

Web survey to be administered to AmeriSpeak panelists to recruit interested panelists

OMB #1545-1349 – this will display on each screen of the web survey under the navigation buttons

[SP, PROMPT]

S1.

During 2019, were you self-employed or an independent contractor? This could include full-time work, freelancing, or a part-time side job or “side gig”, such as driving for a ride-sharing company, renting out property (Airbnb), or dog-walking. You may or may not have received a 1099 tax form from your employer or clients.

- 1 Yes
 - 2 No
 - 77 Not sure
-

[SHOW IF S1 = 1]

S1A.

Was any of your income in 2019 specifically from “gig” work, such as driving for a ride-sharing company, pet sitting, or other work where you were paid by the task for specific tasks?

- 1 Yes
 - 2 No
-

[SHOW IF S1 = 1]

S1B.

For approximately how many years have you filed an annual income tax return as self-employed or as an independent contractor?

- 1 1-2 years
 - 2 3-5 years
 - 3 More than 5 years
-

S2.

During 2019, did you own or operate a small business? This can include partnerships, S corporations, and LLCs with assets under \$10 million.

- 1 Yes
 - 2 No
 - 77 Not sure
-

[SHOW IF S2 = 1]

S2A.

For approximately how many years have you filed an annual income tax return as a small business?

- 1 1-2 years
 - 2 3-5 years
 - 3 More than 5 years
-

[SHOW IF (S1=1) OR (S2=1)]

S3.

Who typically prepares your annual personal income tax return?

- 1 I did
 - 2 Someone else
 - 77 Not sure [TERMINATE]
-

S3a.

How familiar are you with how your tax return was prepared and filed this year?

- 1 Very familiar
 - 2 Somewhat familiar
 - 3 Not very familiar
 - 4 Not familiar at all [TERMINATE]
-

S4.

Did you or do you expect to file any of the following forms or schedules with your federal income tax return for 2019? Select all that apply.

- 1 Small business income (Schedule C)
 - 2 Supplemental income, such as rental income, royalties, and trusts (Schedule E)
 - 3 Farm income (Schedule F)
 - 4 Self-employment income (Schedule SE)
 - 5 Employee business expenses (Form 2106)
 - 6 Partnerships (Form 1065)
 - 7 S Corporation (Form 1120-S)
 - 8 Another kind of corporation (Form 1120-C)
 - 9 None of the above
 - 77 Not sure
-

[DISPLAY1]

We want to find out about your experience with taxes as someone who is self-employed or has a small business. We are partnering with the consulting firm ICF on behalf of the IRS to provide feedback on a

survey being developed on this topic by inviting a small number of AmeriSpeak panelists to participate in some interviews via phone and web.

For the IRS to speak with the public, we are required to have approval from the Office of Management and Budget. Their approval number for this project is 1545-1349. If you have any comments regarding this study, please write to: IRS, Special Services Committee, SE:W:CAR:MP:T:M:S – Room 6129, 1111 Constitution Avenue, NW, Washington, DC 20224.

[DISPLAY2]

If you would like to participate, a researcher from ICF will call you during the date and time you choose between [DATE] and [DATE]. You will need to be at a computer because you will get to preview a web survey that we are currently developing and provide LIVE feedback on the survey questions!

The interview will take about an hour to complete and panelists who complete the interview will receive 75,000 AmeriSpeak points (worth \$75!).

[SP; PROMPT]

S5.

Are you willing and available to participate in this type of interview?

You will need to have access to a phone and a computer connected to the internet at the time of the interview.

You will get a chance to tell us the best dates and times for an interview with a researcher from ICF on the following screens.

1. Yes
 2. No
-

[IF RACETHNICITY=4 and S5=1, SP; PROMPT]

S5A.

Would you be interested in participating in Spanish? Feedback on our Spanish-language survey would be especially helpful to make sure we get it right!

1. Yes
 2. No
-

[IF S5=1; GRID, MP ACROSS, MP DOWN]

S6.

While we may not be able to accommodate everyone's preferences, we would like to know the most convenient time you to participate in the 1 hour interview.

Which days and times are you available to be interviewed? Keep in mind, you will want 1 hour in a quiet place with access to the internet. You will need to be able to look at a web page (preferably on a screen larger than your smartphone) while also talking to the interviewer on the phone. You will be reviewing a web survey live, while chatting on the phone!

Please select all your preferred time slots.

Date	9 AM - 10 AM	10 AM - 11 AM	11 AM - 12 PM	12 PM - 1 PM	1 PM - 2 PM	2 PM - 3 PM	3 PM - 4 PM	4 PM - 5 PM	5 PM - 6 PM	6 PM - 7 PM
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[IF S5=1; 3x numboxes]

S7.

What phone number would you like us to call you on?

Enter phone number: ([xxx]) [xxx]-[xxxx]

Record as: (S4_TEL1) S4_TEL2-S4_TEL3

Leave Refusals as blank (no need to record)

[DISPLAY3]

Thank you for your interest in participating in this phone interview with researchers from ICF!

If you are selected, AmeriSpeak Support will send you email reminders so you don't miss out on this opportunity to help us develop our survey!

Email reminder #1 to be sent to recruited panelists (from NORC)

Email subject: You're in! Confirming upcoming phone interview with ICF (worth \$75 in AmeriSpeak Points!)

Email body:

Hello,

Thank you for your interest in participating in a one-hour phone interview to review a questionnaire and help us design a better survey! A member of the survey development team from ICF will give you a call on **[DATE]** at **[TIME]**, your local time.

When you complete the interview, you will earn 75,000 AmeriPoints (worth \$75!).

Please make sure you have internet access from a computer where you can view a webpage and are in a quiet place to talk during your scheduled interview time.

Within 24 hours of your scheduled interview session, a researcher from ICF will send you an email with a link to use to join them online to view the survey during your interview. You will also receive a phone call from ICF for your interview.

Before your interview time, please review the following materials. In order to participate, you must read these before your interview on **[DATE]** at **[TIME]**.

[Link to materials](#)

Only a few people have been selected to participate in these interviews. If something comes up and you will not be able to talk with ICF at the scheduled time, please contact them directly at TaxpayerSurvey@icf.com or 1-844-282-3435 so they can reschedule your interview or allow someone else to participate.

Sincerely,

The AmeriSpeak Support Team

Email reminder #2 to be sent to recruited panelists (from ICF)

Email subject: Your phone interview with ICF is coming up!

Email body:

Hello,

Thanks again for your interest in participating in this exclusive opportunity for AmeriSpeak panelists. For completing this one-hour phone interview, you will receive 75,000 AmeriPoints (worth \$75). A member of the survey development team from ICF will call you at **[TIME]**, your local time [IF NEEDED:tomorrow/Monday].

Please make sure you have internet access from a computer where you can view a webpage and are in a quiet place to talk. You will receive a call from the ICF researcher at xxx-xxx-xxxx.

Sincerely,

ICF, in collaboration with AmeriSpeak