



**Mediabarn Phone Survey
IRS Recruitment Screener
Personas 2020**

Location: all sessions will be conducted remotely

Scheduled Dates: July- August 2020

Session Length: 60 minutes

Number of participants: min 40 participants total (min 8-9 interviews x 5 audience groups)

Incentives (Amazon.com gift cards):

1. Advanced booking: \$75

Paperwork Reduction Act

Paperwork Reduction Act: OMB No: 1505-0231. This report is authorized under the Paperwork Reduction Act. Data collected will be shared with IRS staff, but your responses will be used for research and aggregate reporting purposes only and will not be used for other non-statistical or non-research purposes such as direct enforcement activities. The information that you provide will fully be protected allowable under the Freedom of Information Act (FOIA). Public reporting burden for this collection of information is estimated to average 75 minutes, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to Special Services Section, SE:W:CAR:MP:T:M:S, Room 6129, 1111 Constitution Avenue, NW, Washington, DC 20224.

Phone SCRIPT

Hello, may I please speak to (name)? This is (name) from **Mediabarn** in Arlington, VA. I am calling you today because you responded to an ad we posted about a user research study. Is this a good time to speak with you?

Again, I am calling about the ad we posted to participate in a phone interview.

We are running our study on (date) and are offering a \$75 **Amazon.com gift card** to those who participate. If you qualify, are you available to participate?

IF AVAILABLE

Great! I'll need to ask you a several follow-up questions to assess whether you will qualify for this specific study. All the information you provide will be kept confidential at Mediabarn.

(Continue to IRS-specific recruitment questions.)

IF NOT AVAILABLE

May we call you for a future testing opportunity?

YES/NO

Thank you very much for your time. Good-bye.

IRS-Specific Recruitment Questions SCRIPT

1. Sometimes we need to speak with those who have and those who have not been part of a market research study in the past. When, if ever, was the last time you participated in a market research study? _____

THANK AND TERMINATE IF LESS THAN SIX MONTHS AGO, OR IF TOPIC WAS IRS.

If over six months ago: What was the topic of that study? _____

2. These research study sessions will be audio recorded for internal use only. Therefore, we will ask you to consent to be recorded; would you be agreeable to that?
- Yes
 - No **(Terminate call – Skip to bottom of script.)**
3. Do you currently work, or have you ever worked, for any of the following? **(Terminate if YES to any.)**
- Department of Treasury
 - Internal Revenue Service
4. Do you currently work as a tax professional, that is, is your occupation one that involves helping others to file or prepare their tax returns, or otherwise interacting with the IRS on behalf of others?
- Yes **(Terminate call – Skip to bottom of script.)**
 - No
5. Are you responsible for...**(Select all that apply.)**
- Gathering information about or from the Internal Revenue Service for your taxes
 - Communicating with the Internal Revenue Service for your taxes
 - Preparing tax or other documents for the Internal Revenue Service for your taxes
 - Filing tax or other documents for the Internal Revenue Service for your taxes
 - Ensuring the payment of or paying taxes to the Internal Revenue Service for your taxes
 - None of the above
6. Did you or anyone in your household file a Federal Income Tax Return between 2018-2020?
(Recruit a mix.)
- Yes
 - No – **Skip to Q8**
7. Who filed your most recent Federal Tax Return and how?
- Nobody, I didn't need to file
 - Myself, filling out forms by hand
 - Myself, using tax preparation software or an online application
 - Another in my household filed on my behalf either by filling out forms by hand, using tax preparation software, or an online application
 - A professional tax preparer, accountant or bookkeeper filed on behalf of my household
 - Friend or family member filed on behalf of my household
 - Volunteer (at a volunteer tax preparation location) filed on behalf of my household
 - IRS Service representative at an IRS office filed on behalf of my household

- Other
 - o Record: _____
- Do not know

HOLD
(Terminate call – Skip to bottom of script.)

8. Have you needed to contact the IRS for any reason **unrelated** to your U.S. Federal Income Tax Return within the past two years?

- Yes
- No

9. Have you done any of the following activities within the past two years? **(Select all that apply.)**

- Called the IRS
- Emailed the IRS
- Visited IRS.gov
- Visited an IRS office
- None of the above **(Terminate call IF both Q6 & Q8 responses are also No/Not Applicable – Skip to bottom of script.)**

[Prioritize recruiting of individuals who are responsible for their taxes (Q5), have filed their Income Tax Return (Q6 & Q7), and contacted the IRS for reasons unrelated to filing (Q8) across all audience groups. Recruit ONLY non-filers where reasonably expected (Examples: Retired & Un/Underbanked). CONTINUE to Q10.]

10. Are you a current U.S. Citizen?

- Yes
- No – **Capture as Non-Citizen**

[Recruit a total of 8-9 respondents who are Non-Citizens; CONTINUE to Q11.]

11. Do you currently live in the United States?

- I live in the United States
- I live outside the United Status – **Capture as Overseas Taxpayer**

[Recruit a total of 8-9 respondents who are Overseas Taxpayer. Aim to recruit mix of U.S. Citizen Overseas and Non-Citizen Overseas Taxpayers. CONTINUE to Q12.]

12. Which one of the following best describes your current employment status? **(Select all that apply.)**

- Employed Full-Time
- Employed Part-Time
- Unemployed
- Student
- Retired – **Capture as Retiree/SS**
- None of the above, please specify – **HOLD**

13. Do you currently receive Social Security benefits?

- Yes – **Capture as Retiree/SS**
- No

[Recruit a mix of 8-9 respondents who are Retirees and/or Employed while receiving Social Security income.]

14. Are you currently employed by the military on active duty?

- Yes
- No **- SKIP to Q17**

[Recruit a total of 8-9 respondents who are Active duty military. CONTINUE to Q15.]

15. Are you currently or have you ever been stationed outside of the U.S.?

- Yes - I am currently stationed outside of the U.S.
- Yes - I have been stationed outside of the U.S.
- No

[Aim to recruit a 50/50 mix of stationed inside vs. outside.]

16. What branch of the military do you serve?

- Army
- Navy
- Air Force
- Marine Corps
- Coast Guard
- Other **- HOLD**

17. Do you have a checking or savings account, or share one with someone in your household?

- Yes
- No **- Capture as Unbanked**

18. Have you used any of the following financial products or services from an alternative financial services provider (a product or service provided outside of your bank) within the past 12 months?

- Money orders **- Capture as Underbanked**
- Check cashing **- Capture as Underbanked**
- International remittances **- Capture as Underbanked**
- Payday loans **- Capture as Underbanked**
- Refund anticipation loans **- Capture as Underbanked**
- Rent-to-own services **- Capture as Underbanked**
- Pawn shop loans **- Capture as Underbanked**
- Auto title loans **- Capture as Underbanked**
- Other

o Record: _____ **HOLD**

- None of the above

[Recruit a total of 8-9 respondents who are Unbanked; minimum 6 Unbanked & 3 Underbanked. CONTINUE to Q18.]

19. Is English the primary language spoken in your household?

- Yes
- No

What is the language primarily spoken?

- RECORD

20. Do you have a social security number (SSN) or taxpayer identification number (ITIN)?

- Social Security Number
- Taxpayer Identification Number
- Both
- None of the above

21. What tax forms do you file? **(Select all that apply.)**

- U.S. Individual Income Tax Return, Form 1040
- U.S. Nonresident Alien Income Tax Return, Form 1040-NR
- U.S. Tax Return for Seniors, Form 1040-SR
- Miscellaneous Income, Form 1099-MISC
- Distributions From Pensions, Annuities, Retirement or Profit Sharing Plans, IRAs, Insurance Contracts, etc., Form 1099-R
- Other
 - RECORD
- None
- Not sure

IF ELIGIBLE → Invite to Participate

Thank you for answering all of my questions. As a continuation of our research, we would like to invite you to participate in our phone interview. The session will take about 45 minutes and you will be paid a \$75 **Amazon.com gift card** for your time.

What time of day would work best for you to participate? **SEE SCHEDULE**

You are the only person scheduled to participate at [time & date of session]. You should plan to be available approximately 10 minutes prior to your scheduled appointment.

Do you have any questions for me at this time?

We will attempt to phone you on the day prior to your appointment to confirm that you have received your login directions and remembered your appointment. Should we contact you at the same phone number when making this confirmation call?

Thank you for your willingness to participate in this study. We will see you on (day, date at time). Good-bye.

IF NOT ELIGIBLE → Discontinue call

I am sorry we are looking for people who fit a specific circumstance and it doesn't appear that we will be able to use you for this test. May we call you for a future testing opportunity? YES/NO

Thank you very much for your time. Good-bye.