



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

[SP, PROMPT]

S1.

Have you filed a Federal Income Tax Return in 2020 for income earned in 2019, or are you planning to file one?

CAWI RESPONSE OPTIONS

- 1 Yes, I have filed a federal tax return
- 2 I haven't filed a federal tax return yet, but am planning to
- 3 No, and I am not expecting to file a federal tax return this year [TERMINATE]
- 77 Not sure [TERMINATE]

S2.

Who usually prepares your federal income tax return?

- 1 I do
- 2 My spouse/partner [TERMINATE]
- 3 Paid preparer [TERMINATE]
- 4 Someone else [TERMINATE]
- 77 Not sure [TERMINATE]

D7_2

Are you currently or have you ever been in the U.S. Armed Forces?

- 1 Yes
- 2 No

[SHOW IF D7_2=1 "YES"]

[SP]

D7_3

Which of the following best describes your current U.S. Armed Forces service status?

- 1 In the Active Component
- 2 Active Guard and Reserve (AGR)
- 3 In a Reserve or National Guard forces unit
- 4 Veteran, but not retired military
- 5 Retired military veteran

AGE2

What is your current age?

[0-999] Years

[IF AGE2<18, TERMINATE]

HHINCSSI.

Was your total HOUSEHOLD income in 20182019 ...

¿Fue el ingreso total de su HOGAR en 20182019 ...

1	Less than \$5,000	
2	\$5,000 to \$9,999	
3	\$10,000 to \$14,999	
4	\$15,000 to \$19,999	
5	\$20,000 to \$24,999	
6	\$25,000 to \$29,999	
7	\$30,000 to \$34,999	
8	\$35,000 to \$39,999	
9	\$40,000 to \$49,999	
10	\$50,000 to \$59,999	
11	\$60,000 to \$69,999	
12	\$70,000 to \$84,999	[TERMINATE]
13	\$85,000 to \$99,999	[TERMINATE]
14	\$100,000 to \$124,999	[TERMINATE]
15	\$125,000 to \$149,999	[TERMINATE]
16	\$150,000 to \$174,999	[TERMINATE]
17	\$175,000 to \$199,999	[TERMINATE]
18	\$200,000 or more	[TERMINATE]

[DISPLAY1]

We want to find out about your experience filing taxes this year. 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 focus groups via phone.

[DISPLAY2]

If you would like to participate and are selected, you will participate in a call with 5-7 other AmeriSpeak panelists and a researcher from ICF.

The focus group will last about an hour and AmeriSpeak panelists who participate will receive <u>75,000 AmeriSpeak points (worth \$75!)</u>.

[SP; PROMPT]

S1.

Are you willing and available to participate in this focus group? You will need to have access to a phone at the time of the interview.

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

1. Yes
2. No

[IF S1=1; GRID, MP ACROSS, MP DOWN]

S2.

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

Which days would be you be available to be interviewed? Keep in mind, you will want 1 hour in a quiet place with access to a telephone.

Please select all your available dates and times.

Date	Afternoon (2:00 pm – 3:00 pm)	Evening (6:00 pm – 7:00 pm)
DATE TBD		
DATE TBD		
DATE TBD		
DATE TBD		

[IF S1=1; 3x numboxes]

S4.

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)

[IF S1=1; DISPLAY3]

Thank you for your interest in participating in a focus group with researchers from ICF!

If you are selected, the AmeriSpeak Tax Tools Survey Team will send you an email to let you know the date and telephone information of your focus group. Be sure to look out for an email so you don't miss out on this opportunity to help us understand taxpayers' experiences!

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests along with the address where you can send comments regarding the study. You

are not required to respond unless a currently valid OMB approval number is displayed. The OMB number for this study is 1545-2274. 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.

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

Email subject: You're in! Upcoming focus group confirmation (worth \$75!)

Email body:

Hello [FIRSTNAME],

Thank you for your interest in participating in a one-hour focus group! You have been selected to participate in the focus group on:

[DATE] at [TIME], your local time.

After you participate in the focus group, you will earn 75,000 AmeriPoints (worth \$75!).

Please make sure you are in a quiet place to talk during your scheduled focus group time.

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

[Link to Informed Consent](#)

Sincerely,

The AmeriSpeak Tax Tools Survey Team

Email reminder #2 to be sent to recruited panelists (sent by NORC)

Email subject: Your telephone focus group with ICF is here!

Email body:

Hello [FIRSTNAME],

Thanks again for your interest in participating in this exclusive opportunity for AmeriSpeak panelists. As a reminder, your focus group is TODAY at:

[TIME], your local time.

Please be sure to join the dial in for your group at that time, using the following information:

(XXX) XXX-XXXX

When prompted to enter a passcode, please enter:

XXXXXX#

Please make sure you are in a quiet place to talk. For participating in this one-hour telephone focus group, you will receive 75,000 AmeriPoints (worth \$75)!

Sincerely,

The AmeriSpeak Tax Tools Survey Team