

## ATTACHMENT B: Participant Screener

### WISS Behavior Laboratory Participant Screener

*E-mail:* The IRS would like your help to get information [INSERT]. Please complete the following questionnaire and choose only one response per question.

*Phone:* The IRS would like your help to get information about [INSERT]. We would like to ask you a few questions about yourself to determine your eligibility for this study.

***NOTE TO RECRUITERS: Participants must be at least 18 years old, filed a return in 20xx, and be able to complete the screener in English.***

1. What category best describes your current age?
  - Under 18 (TERMINATE)
  - 18 to 24 years
  - 25 to 34 years
  - 35 to 44 years
  - 45 to 54 years
  - 55 to 64 years
  - 65 to 74 years
  - 75 or older
  
2. Did you or your spouse file a Federal Income Tax Return in 2014 for income earned in 2013?
  - Yes, I or my spouse filed a federal tax return
  - No, neither I nor my spouse filed a federal tax return (TERMINATE)
  - Not sure/Refused (TERMINATE)
  
3. Are you of Hispanic or Latino origin (ethnicity)?
  - Yes
  - No
  
- 3a. What is your race? (Please select one or more) [ACCEPT ALL MULTIPLE ANSWERS]
  - White
  - Black or African American
  - Asian
  - Native Hawaiian or other Pacific Islander
  - American Indian or Alaskan Native
  
4. What is the highest level of education you have completed?
  - Less than 9<sup>th</sup> grade
  - 9<sup>th</sup> grade to 12<sup>th</sup> grade, no diploma
  - High school diploma or GED
  - Some technical or vocational school
  - Technical or vocational school graduate
  - Some college, no degree
  - Associate's Degree
  - Bachelor's Degree
  - Master's Degree
  - Post-Master's Degree
  
5. What category best describes your total household income for the past 12 months?
  - \$15,000 or less
  - \$15,001 to \$25,000
  - \$25,001 to \$35,000
  - \$35,001 to \$50,000
  - \$50,001 to \$75,000
  - \$75,001 to \$100,000
  - \$100,001 or more
  
6. What is the primary language spoken at home?
  - English
  - Chinese

- Spanish
   
  Vietnamese  
 Russian
   
  Korean  
 Other (please specify): \_\_\_\_\_

7. What is your marital status?

- Single, never married
   
  Separated  
 Married
   
  Divorced  
 Civil union/domestic partnership
   
  Widowed

8. Which of the following is the filing status you used on your 2014 tax return?

- Single
   
  Married Filing Separately  
 Married Filing Jointly
   
  Qualifying Widow(er) with Dependent Child  
 Head of Household (single with dependent parent or child)  
 Don't Know

9. What is your employment status?

- Full-time Employee
   
  Retired  
 Part-time Employee
   
  Out of Work and Looking for Work  
 Student
   
  Out of Work and not Looking for Work  
 Military
   
  Unable to Work

10. Who did most of the work preparing your most recent tax return?

- I myself (with software)  
 I myself (without software)  
 A paid preparer  
 An unpaid preparer (friend, relative, colleague or a volunteer preparer from a community organization)

11. For this most recent tax return, was your return sent to the IRS by paper via regular mail or electronically?

- Regular mail  
 Electronically (e-File or Free File)  
 Other method (e.g. dropped off in person, etc.)

12. Do you own or use any of the following devices to access the Internet?

- |                                   | Yes                      | No                       |
|-----------------------------------|--------------------------|--------------------------|
| Smartphone or other mobile device | <input type="checkbox"/> | <input type="checkbox"/> |
| Tablet                            | <input type="checkbox"/> | <input type="checkbox"/> |
| Laptop, desktop, or computer      | <input type="checkbox"/> | <input type="checkbox"/> |

13. What familiar are you with <insert notice/form/etc.>?

- Not at all familiar  
 Slightly familiar  
 Somewhat familiar  
 Moderately familiar  
 Extremely familiar

14. <Insert any additional project specific questions>

