

IRS 1040 Usability Testing

Task 3 Screener and Phone Guide

Intro

Thank you for your call, this is [NAME] with the MITRE Corporation.

i. Did you receive a letter about the new 1040 form study that we are doing for the IRS?

Yes **[Record in Spreadsheet]**

No **[If no, determine how participant learned of study/why calling]**

ii. How did you learn about this study?

[If answer to question i is no]:

We appreciate your interest in our independent study. We are trying to understand a very specific group of taxpayers, and sent letters to members of that group. If you did not receive a letter, you are not eligible to participate. Thank you for calling. Have a nice [day/evening].

[If answer to Question i is yes]:

We are conducting an independent research study for the IRS to gather feedback from paper filers like you, and we are traveling to your area to conduct this research. We are looking for eligible volunteers to participate in this study. Eligible volunteers will participate in a 60- to 90-minute in-person interview at a public location near you. If eligible, you will receive a \$100 Visa gift card as a token of appreciation for your participation. We will not ask you for your Tax ID number or Social Security Number during this call, or during the in-person interview.

Do you have about five minutes to answer some questions, so we can verify your eligibility to participate in the study? If eligible, we will go ahead and schedule an in-person interview.

Screener

1. What is your full name?

[Record in Spreadsheet]

2. What is the best contact phone number for you?

[Record in Spreadsheet]

3. Do you have an e-mail address that you would like to use for any future correspondence about the study?

[Record in Spreadsheet]

3. What is the zip code of your primary residence?

[Record zip code on spreadsheet]

Within set zip code limits of 4 travel locations **[WILL LIST ELIGIBLE ZIP CODES IN FINAL TRACKING SPREADSHEET]**

Outside of set zip code/city limits – **Terminate:** I'm sorry, we are only conducting interviews within a certain set of zip codes, so you don't qualify for this study. Thank you for your time. Have a good [day/evening].

4. We will be conducting sessions at your location between [date] and [date]. We are looking for participants to meet us at [LOCATION] for a 60 to 90 minute interview. Are you available to meet us at [specific location] during this time frame?

Yes - Continue

No - **Terminate:** Thank you for your time. Have a good [day/evening].

5. Did you complete paper tax return in at least one of the previous two tax years (2016, 2017)?

Yes - Continue to next question

No - **Terminate:** I'm sorry, we are only looking for people who have previously filed a paper form. Thank you for your time. Have a good [day/evening].

a. What form did you file?

1040

1040A

1040EZ

Don't know

6. Would you say that you are the adult in your household who is most familiar with the preparation and filing of your federal income tax returns? **[If no]** Would you say you are equally familiar as the adult most familiar with the preparation and filing of your federal income tax returns?

Yes - Continue

Equally familiar - Continue

No - **Terminate:** I'm sorry, we are only conducting interviews with people who are familiar with their tax form. Thank you for your time. Have a good [day/evening].

7. What was your filing status for tax year 2017?

Single

Married Filing Joint

Married Filing Separate

Head of Household

Widow/Widower

8. What is your age?

under 18- **Terminate:** Thank you for your time. Have a good [day/evening].

18-30

31-55

56-68

69-81

82+

9. Is your household's annual income less than \$15,000 a year?

Yes - SKIP TO NEXT SCREENER QUESTION

No

Is your household's annual income less than \$35,000 a year but more than \$15,000?

Yes - SKIP TO NEXT SCREENER QUESTION

No

Is your household's annual income less than \$50,000 a year but more than \$35,000?

Yes - SKIP TO NEXT SCREENER QUESTION

No

Is your household's annual income less than \$75,000 a year but more than \$50,000?

Yes - SKIP TO NEXT SCREENER QUESTION

No

Is your household's annual income less than \$90,000 a year but more than \$75,000?

Yes - SKIP TO NEXT SCREENER QUESTION

No

Is your household's annual income more than \$90,000 a year?

Yes

No

10. What is the highest degree or level of school you have completed?

No schooling completed

Completed schooling through Grade ____ .

Received High School Diploma, GED or alternative credential for high school graduation

Associate's Degree

Bachelor's Degree

Master's Degree (for example: MA, MS, Meng, MEd, MSW, MBA)

Professional degree beyond a bachelor's degree (for example: MD, DDS, DVM, LLB, JD)

Doctorate degree (for example: PhD, EdD)

Thank you for taking time to answer these questions. Please hold for a moment while I verify your eligibility.

Thank you for waiting. You are eligible to take part in our study. Participation requires that you attend an in-person interview at a public location where MITRE researchers are conducting the interviews. At the in-person interview, you will receive a \$100 VISA prepaid gift card as a thank you for participating in this important study. Of the following time slots, which works best for you? **[Read list of available time slots from tracking spreadsheet, record in spreadsheet and confirm follow up contact information]**. We will contact you again before the interview to confirm your participation. Have a great day!