

**Participant Screener for Online Account (OLA) Testing**  
Round One  
April 2019

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Participant Screener for Online Account (OLA) Testing Sessions

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**INTRODUCTION**

Hello, my name is \_\_\_\_\_ and I am calling on behalf of Fors Marsh Group. We are conducting a paid study to gather feedback on IRS Taxpayer Online Account, an online service available to taxpayers that allows them to view their account information.

The study will consist of one-on-one interviews on \_\_\_\_\_ and \_\_\_\_\_. The interview will last about 60 minutes, and we are offering both day and evening sessions for your convenience. If you are eligible and decide to participate, you will receive a \$100 honorarium. The interview will be strictly for research, and all of your comments will be held private to the extent covered by law. Would you be interested in participating?

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

[If YES above] I'd now like to ask a few questions to see if you meet the criteria that we are looking for.

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**Screening Questions**

1. Did you file a tax return in at least one of the previous four tax years?

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

2. Some of our questions about Online Account will relate to services we offer for taxpayers that have paid money to the IRS. In the last four years have you ever owed taxes when filing your tax return, had a balance due, had a balance deducted from your refund amount, or made a tax payment to the IRS?

- Yes – Continue
- No –

3. Some taxpayers make regular (quarterly or estimated) payments directly to the IRS, do you make regular payments to the IRS? This can include installment agreement payments or payments made on a payment plan.

- Yes – Continue
- No – (if no to q2 and q3 then terminate)

4. Do you currently have a Taxpayer Online Account (<https://www.irs.gov/payments/view-your-tax-account>) with the IRS?

- Yes (continue to Q4a)
- No (continue to Q5)
- Not Sure (continue to Q5)

4a. When was the last time you accessed your Taxpayer Online Account with the IRS?

- Before May 2017 (Continue to Q4b)
- After May 1, 2017 (Continue to Q6)
- Not Sure (Continue to Q4b)

4b. The IRS introduced the current Taxpayer Online Account in May 2017. Taxpayers who created an account before then can still use their username and password, but must complete a quick process to recertify. In order to recertify, you will need to provide the information below to the IRS during your account recertification. Please note that the requested information will not be provided to <Facility name> or to the researchers. No one else will see or have access to this information. This is just a courtesy notification of what the secure IRS website will ask when you renew your IRS account.

- Your full name
- Your most recent tax filing status
- Your mailing address as it was listed on your most recent tax filing
- A personal mobile phone number that is in your name and can receive text messages (cannot be a business or government phone)
- An email address
- Financial information to identify your account, such as an auto loan number, a home loan number, a credit card number (cannot be a debit card or an American Express Card), or a home equity line of credit number

Are you willing and able to provide this information in order to recertify your account?

- Yes (Continue to Q6)
- No – (Terminate)

5. Would you be willing to create a Taxpayer Online Account so that you can participate in this study? In order to create an IRS Taxpayer Online Account, you will need to provide the information below to the IRS during your account creation. Please note that the requested information will not be provided to <Facility name> or to the researchers. No one else will see or have access to this information. This is just a courtesy notification of what the secure IRS website will ask when you create your IRS account.

- Your full name
- Your most recent tax filing status
- Your mailing address as it was listed on your most recent tax filing
- A personal mobile phone number that is in your name and can receive text messages (cannot be a business or government phone)

- An email address
- Financial information to identify your account, such as an auto loan number, a home loan number, a credit card number (cannot be a debit card or an American Express Card), or a home equity line of credit number

Are you willing and able to provide this information in order to set up and verify your account?

- Yes – Continue
- No – (Terminate)

6. To which age group do you belong? (Read list)

- under 18- Terminate: Thank you for your time. Have a good [*day/evening*].
- 18-30
- 31-55
- 56+

7. What is the total annual income of your household? (Read list)

- Less than \$15,000.....Continue
  - \$15,000 but less than \$25,000.....
- Continue
- \$25,000 but less than \$50,000.....
  - Continue
  - \$50,000 or more.....Continue

8. Gender? (**Note to recruiter: Do not ask. Fill in using Name on record and their voice tone during the call. If not clear, leave blank.**)

- Female
- Male

9. What was your Filing Status on your 2017 tax return?

- Single
- Married Filing Joint
- Married Filing Separate
- Head of Household
- Widow/Widower

10. What was your Tax Preparation Method on your 2017 tax return?

- Self prepared paper
- Self prepared with off the shelf computer program
- Self prepared with online software
- Paid Preparer

11. Do you live in...
- An urban area
  - A suburban area
  - A rural area

## **INVITATION**

Thank you for answering our questions. Based on your responses, you qualify for the research interviews. We would like to invite you to take part in this study. The research interviews will take place on <dates> at <location>. If you choose to participate, you will receive a \$75 honorarium at the end of the session for participating.

1. Would you like to hear what times we have available?
  - Yes – Discuss time options
  - No – Terminate: Thank you for your time. Have a good [day/evening].
  
2. Are you free at any of those times and are you willing to participate?
  - Yes – Continue
  - No – Terminate: Thank you for your time. Have a good [day/evening].

### **3a. FOR THOSE WHO DO NOT CURRENTLY HAVE AN ACCOUNT:**

I'm glad that you will be able to join us! You will receive a reminder call 24 hours before your session. At that point we will ask you for information that will confirm you have established your IRS Online Account. Please attempt to establish your account as soon as possible, and contact us as soon as possible if you encounter any issues.

- Do you understand that you need to establish an IRS Online Account for this study?
- Yes – Continue
  - No – Recruiter, please clarify the requirements for the caller as needed.

### **3b. FOR THOSE WHO DO CURRENTLY HAVE AN ACCOUNT:**

I'm glad that you will be able to join us! You will receive a reminder call 24 hours before your session. At that point we will ask you for information that will confirm you have verified access to your IRS Online Account. Please attempt to sign in as soon as possible, and contact us as soon as possible if you encounter any issues.

- Do you understand that you need to verify access to your IRS Online Account for this study?
- Yes – Continue
  - No – Recruiter, please clarify the requirements for the caller as needed.

Great! Thank you!

At this point I need to collect some contact information from you.

**(Note: This information is required only as a part of this study. Your information is kept strictly private to the extent allowed by law. Your phone number is required only for a reminder call that will be made prior to the start of the research study).**

- First name:
- Last name:
- Email:
- Daytime phone:
- Evening phone:

Thank you. We are only inviting a few people, so if for some reason you are unable to participate, it is very important that you notify us as soon as possible so we can find someone else to take your place. Please call or email *[insert contact and phone, email]* if this should happen. We look forward to having you participate on *[insert appropriate date]*.

We are required by law to report to you the OMB (Office of Management and Budget) Control Number for this public information request. That number is 1545-2274. In addition, if you have any comments about the time estimate associated with this study or suggestions on making this process simpler, you may write to the IRS. Would you like the address?

**[If yes]**

Internal Revenue Service, Tax Products Coordinating Committee,  
SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224.

Thank you for your time. We will be in touch again the day before the session to confirm your attendance.

#### **TERMINATE TEXT**

Thank you very much for your time, and thank you for answering our questions. Unfortunately, based on the requirements, we are not able to extend you an invitation. Perhaps we can include you in a future research session. Have a good *[day/evening]*.

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is 1545-2274. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to the, Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224.

## OLA Round One Participant Reminder Call

Good Morning/Afternoon/Evening Mr./Mrs. \_\_\_\_\_

I am calling from XYZ to confirm that you are planning to attend our scheduled testing session on Monday, October 12 at 1:30PM. (Insert appropriate info as needed). Are you still able to attend?

- Yes – Continue
- No – Would you be interested in re-scheduling your session? (If yes, please reschedule accordingly)

Thank you for confirming your ability to attend.

When you created or re-authenticated your IRS Online Account, you should have received a text message access code. Can you please tell me what number texted you that access code? If it is easier, you can just read the text message to me. Do you have that information to provide to me?

- Yes –

The correct response is 77958.

The message reads: IRS Password Service: Your security code is XXXXXX. – Reply HELP for more information.

- No – **(Deleted Text)** If you have deleted that message, you will need to log in to your account again. Each time you log in you will receive a text message from the same number. I will be happy to stay on the line while you log in and provide me with that information, or you can call me back if needed.

- No – **(Didn't Create Account)** If you have not created an account, you will need to follow the instructions that were originally provided to you when you were contacted for this study. Please note that you did previously agree to follow these steps. Would you like for me to send those instructions to you again? I can also email them to you again if needed. Would you like for me to email those to you? **If yes, then email in addition to reading.**

- No – **(Had Issues with Creation)** Please explain your issue to me in detail. I apologize that you have had issues with creating your account. If you are able to try again, please do. I can email the account set-up information to you if that would be helpful. Would you like that information? **If yes, please email instructions again.**

**If no due to account issues, keep them recruited with well documented notes of the issue that the individual explained.**

**If no due to not creating an account, please read the text below.**

Are you willing to create a Taxpayer Online Account so that you can participate in this study? In order to create an IRS Taxpayer Online Account, you will need to provide the information below to the IRS during your account creation. Please note that the requested information will not be provided to <Facility name> or to the researchers. No one else will see or have access to this information. This is just a courtesy notification of what the secure IRS website will ask when you create your IRS account.

- Your full name
- Your most recent tax filing status
- Your mailing address as it was listed on your most recent tax filing
- A personal mobile phone number that is in your name and can receive text messages (cannot be a business or government phone)
- An email address
- Financial information to identify your account, such as an auto loan number, a home loan number, a credit card number (cannot be a debit card or an American Express Card), or a home equity line of credit number

If you are still interested in participating, please visit <https://www.irs.gov/payments/view-your-tax-account> and create your account.

Once you have successfully created your account please call me back at \_\_\_\_\_ to provide me with the information you receive through a text message. If you have issues creating your account, please contact me as soon as possible to let me know.

**If you are not willing to attempt to make an account, you are not eligible to participate at this time. (terminate)**