

W&I Taxpayer Experience Survey 2021
Cognitive Interview Questions
5/3/2021

INTERVIEW INTRODUCTION

Thank you very much for agreeing to participate in this interview. I want to start out by introducing myself: my name is _____ and I work for a research company called ICF, which is located near Washington, D.C. *I am not an employee of the IRS.*

My company has been hired by the IRS to conduct interviews with taxpayers such as yourself. We are interested in finding out how people understand and interpret questions in an IRS customer satisfaction survey. We want to know if the way the questions are worded and the answer choices provided in the survey make sense to you.

I am going to ask you some questions based on the survey questions and invite you to give your interpretation, thoughts, and opinions. There are no right or wrong answers. Also, we are not interested in your actual survey responses; rather, we are interested in your reactions to and interpretations of the questions.

IF APPLICABLE: We also have additional team members observing this interview. They have all signed confidentiality agreements in order to observe.

I also am required to let you know that for the IRS to speak with the public, we are required to have approval from the Office of Management and Budget. The approval number for this project 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.

Before we begin, did you review the informed consent that was sent in your invitation to this interview?

If YES: Obtain verbal consent to record interview and ask if they have any questions.

If NO: I'd like to go over the informed consent. [Obtain verbal consent to record interview and ask if they have any questions].

INTERVIEWER: VERBAL CONSENT TO PARTICIPATE MUST BE RECORDED.

Your participation in this interview is completely voluntary, and we will not be using any of your answers to the survey questions. If at any point during the interview you wish to stop, you may do so. We greatly appreciate any feedback you have to offer us. Please speak loudly and clearly so that our microphones can pick up your voice.

Do you have any questions?

- Yes
- No

INTERVIEWER: IF RESPONDENT ANSWERS NO, PROCEED TO START THE INTERVIEW.

This is a national IRS survey that will be administered online and over the phone. During this discussion I am going to guide you through some of the survey question through the Teams screenshare. As we go through, I'd like you to read each survey question and answer choice out loud before letting me know which answer choices to select. As you answer the questions, please also think out loud. For example, if you are surprised by an answer choice, not sure what the choice means, or unsure of what we are asking, please let me know. After you respond to each question, I will ask you a few questions about how you arrived at your answer. I might ask you if anything was unclear or confusing about the question or what certain words/phrases mean to you. Additionally, please let me know if you have thoughts or questions about something even if I don't ask you about it.

INTERVIEWER QUESTIONS APPEAR IN RED.

W&I Taxpayer Experience Survey 2021

Q1. Are you aware of either of the following IRS resources on savings and banking?

Resource	Yes, I was aware	No, I was not aware
<u>Publication 4870 (Rev. 5-2020): Financial Education and Asset Building (FEAB) Opportunities for Taxpayers</u> Mentions FEAB programs for taxpayers at tax time, including savings bonds, checking/savings accounts, etc.		
<u>Publication 5380--Filing Season 2021: Buying US Savings Bonds With Your Tax Refund</u> Provides information and guidance on selecting this option		

- To what extent is the question clear?
- What does being "aware" of resources mean to you?
- To what extent are the descriptions helpful?
- What, if anything, is unclear in the descriptions?
- To what extent are the items easy or difficult to respond to?

Q2. Are you aware of any of the following non-IRS resources related to savings and banking?

Resource	Yes, I was aware	No, I was not aware
<u>FDIC website</u> People who don't have a bank account can visit the FDIC website for information on where to find a bank that can open an account online and how to choose the right account.		
<u>FDIC Initiatives</u> Initiatives such as the <i>Bank On</i> program and the FDIC's <i>#GetBanked</i> website are leading the effort to strengthen financial inclusion by assisting unbanked Americans in		

accessing convenient, low-cost accounts.		
<u>Veterans Benefits Banking Program</u> Veterans can use the Veterans Benefits Banking Program for access to financial services at participating banks.		
Tax return preparers may also offer electronic payment options.		
Some <u>mobile apps and prepaid debit cards</u> allow for direct deposit of tax refunds. They must have routing and account numbers associated with them that can be entered on a tax return. People should check with the mobile app provider or financial institution to confirm what numbers to use.		
NCUA <u>Credit Union Locator</u> Tool on the NCUA's website at MyCreditUnion.gov.		

- To what extent is the question clear?
- To what extent are the descriptions helpful?
- What, if anything, is unclear in the descriptions?
- To what extent are the items easy or difficult to respond to?

Q3. Has the COVID-19 pandemic changed your preference for having funds direct deposited by the IRS vs. receiving a paper refund check?

- 1 No, I still prefer direct deposit
- 2 No, I still prefer paper checks
- 3 Yes, I used to prefer paper checks but now prefer direct deposit
- 4 Yes, I used to prefer direct deposit but now prefer paper checks
- 5 I do not prefer either of these methods

- To what extent is the question clear?
- Could you restate the question in your own words?
- To what extent are the response options clear?
- To what extent is the question easy or difficult to respond to?

Q4. Would you be interested in any of the following options for receiving your refund or other payments from the IRS?

Select *all* that apply

- 1 Google Pay
- 2 PayPal
- 3 Venmo
- 4 Debit card

- 5 A government portal where you can sign up to receive all federal payments (e.g., tax refunds, SSA or VA benefits) the same way and can update anytime
- 6 None of the above

- To what extent is the question clear?
 - What does being "interested" in the options mean to you?
 - To what extent are the response options clear?
 - Are there any response options you are not familiar with?
 - To what extent is the question easy or difficult to respond to?
 - Are you more, or less, interested in some options vs others?
 - The current question asks you to indicate *if* you are interested in the following options. It does not ask *how* interested you are. Would you be able to answer a question on how interested you were in using these options? The question might include a four-point response scale (Very, somewhat, not very, not at all)?
-

Q5. Why did you choose not to use the callback feature on the IRS toll-free line?

Select *all* that apply

- 1 Preferred to wait on hold
- 2 Had the time to wait on hold
- 3 Felt it would be faster to wait on hold
- 4 Callback would not occur at a convenient time
- 5 Felt I would miss the callback
- 6 Did not have confidence callback would occur
- 7 Other

- To what extent is the question clear?
 - To what extent are the response options clear?
 - Would you add anything to the response options?
 - Would you remove any of the response options?
 - How is response 1 different from response 2, in your mind?
 - How is response 2 different from response 3, in your mind?
 - To what extent is it easy or difficult to respond to the question?
-

Q6. Why did you choose not to e-file your return?

Select *all* that apply

- 8 It was less expensive to file by paper
- 9 It was easier to file by paper
- 10 I had to file a form or other document with my return that prevented me from being able to e-file
- 11 Another reason (please specify)

- To what extent is the question clear?
 - To what extent are the response options clear?
 - To what extent is the question easy or difficult to respond to?
-

Q7. Which form(s) or document(s) kept you from being able to e-file?

Select *all* that apply

- 1 **Form W-7**, Application for IRS Individual Taxpayer Identification Number
- 2 **Form 1042**, Annual Withholding Tax Return for U.S. Source Income of Foreign Persons
- 3 **Form 7202**, Credits for Sick Leave and Family Leave for Certain Self-Employed Individuals
- 4 **Form 8288**, U.S. Withholding Tax Return for Dispositions by Foreign Persons of U.S. Real Property Interests
- 5 **Form 1098-C**, Contributions of Motor Vehicles, Boats, and Airplanes
- 6 Another form/document (please specify) _____
- 7 Don't remember

- To what extent is the question clear?
 - To what extent are the descriptions clear?
 - To what extent is the question easy or difficult to respond to?
-

Q8. Are you aware of the new IRS Notice 1445: Tax Help in Other Languages? This notice explains that the IRS offers tax help in other languages online and by phone.

- 1 Yes, I was aware
- 2 No, I was not aware

- To what extent is the question clear?
 - To what extent are the response options clear?
 - To what extent is the question easy or difficult to respond to?
-

Q9. The IRS.gov website offers a Free File program for taxpayers who meet certain criteria. To use the program, taxpayers can visit the IRS.gov page on Free File, answer a few questions to confirm their eligibility, then choose a software company to file their federal return online (for example: Turbo Tax, TaxAct, 1040NOW, etc.). The IRS Free File program is different from IRS fillable forms and other free options from tax companies.

Were you aware of the IRS Free File program described above?

- 1 Yes, I was aware
- 2 No, I was not aware

- To what extent is the description of the Free File program clear?
- To what extent is the question easy or difficult to respond to?

- How confident are you in your response to this question?
- Please take me through the process you used to get Free File. [Confirm use a non-IRS tax software/website that filed federal taxes at no cost.]

IF RESPONSE TO QUESTION IS NO

- Have you heard of "Free File" options, even if you were not aware that there is a list of them on the IRS.gov website?
 - What do you think this question is asking, in your own words?
-

Q10. Why didn't you use tax software that you found through the Free File program this year?

Select *all* that apply

- 1 I already file for free outside of the Free File program
- 2 My income was too high to qualify for the Free File program
- 3 I do not have confidence/trust in the Free File program
- 4 I do not think free software would be as good as a paid version
- 5 I could not file the forms/schedules I needed to with the Free File program
- 6 I could get a faster refund using another method
- 7 Confusing instructions or too difficult to understand the Free File program
- 8 I tried to use the Free File program but ended up having to pay
- 9 I prefer to continue with previous method
- 10 Another reason (please specify) _____

- To what extent is the question clear?
 - To what extent are the response options clear?
 - How did you interpret the response "Prefer to continue with previous method"? How would you say that in your own words?
 - To what extent is the question easy or difficult to respond to?
-

Q11. To address the impacts of the COVID-19 pandemic, the Federal government provided Economic Impact Payments and other tax credits and relief programs. Additionally, the IRS extended the federal tax filing deadline.

How did this affect your tax filing, if at all?

- 1 It did not affect when I filed my taxes
- 2 It caused me to file **earlier** than I would have otherwise
- 3 It caused me to file **later** than I would have otherwise
- 4 It caused me to file when I would not have filed otherwise

- To what extent is the description of government response clear?
- To what extent is the question clear?
- What does the phrase "affect your tax filing" mean to you?
- To what extent are the response options clear?

-To what extent is the question easy or difficult to respond to?

Q12. Were any of the following included with your federal tax return this year?

Form/Schedule	Yes	No	Don't Know
Itemized deductions including home mortgage deductions, charitable contributions, and other types of deductions (Schedule A)			
Earned Income Tax Credit (EITC/EIC) (e.g., Schedule EIC, series 886 forms)			
Interest and dividend income (Schedule B)			
Small business or self-employment income (Schedule C)			
Capital gains or losses (Schedule D)			
Supplemental income, such as rental income, royalties, and trusts (Schedule E)			
Farm income (Schedule F)			
Employee business expenses (Form 2106)			
Partnerships or S Corp (e.g., Forms 1120, 1120s, 1065)			

-To what extent is the question clear?

-To what extent are the forms and schedules clear?

-To what extent are you familiar with these forms and schedules?

-To what extent is the question easy or difficult to respond to?

Q13. Did you claim the Recovery Rebate Credit this year? You may have claimed this if you were eligible for an Economic Impact Payment but did not receive it or received less than you were entitled to.

1—Yes

2—No

77—Don't Know

-To what extent is the question clear?

-Are you familiar with the Recovery Rebate Credit?

-To what extent is the question easy or difficult to respond to?

Q14. The following questions are about your awareness of different ways to contact the IRS.

Did you know you could get information or help such as obtaining forms or tax law information, checking refund status or getting help to resolve a notice from the IRS in the following ways?

Communication channel	Yes, I was aware	No, I was not aware
Calling an IRS Toll-Free line		
Visiting a local IRS office (Taxpayer Assistance Center, walk-in		

center)		
Visiting the IRS website (IRS.gov)		
Sending regular mail to the IRS		
Online chat with the IRS		
Secure messaging with the IRS regarding a notice you have received		

- To what extent is the introduction sentence clear?
- To what extent is the question clear?
- What does “different ways to contact the IRS” mean to you?
- What does “getting information or help” mean to you? To what extent are the examples helpful in explaining what is meant?
- To what extent are the different channels clear to you?
 - Do any channels not make sense to you?
 - To what extent are visiting the IRS website and online chat similar or different to you?
 - [If aware of secure messaging] Please tell me more. How is this secure messaging conducted?
- To what extent is it easy or difficult to respond about each channel?
- Do you think each of these channels are ways to “contact” the IRS? Is “contact” the best term? Would you recommend a different term? What about “interact with” in place of “contact”?

Q15. Which of the following IRS.gov (online) services/tools have you heard of?

Services/Tools	Yes, I've heard of this	No, I haven't heard of this
Interactive Tax Assistant (ITA) (asks you a series of questions that guide you to a response tailored to your situation)		
IP PIN (Identity Protection Personal Identification Number) Application (a unique number from the IRS used for identity theft protection)		
Tax Withholding Estimator (helps you determine whether you have the right amount of tax withheld from your paycheck)		
Online Employer Identification Number (EIN) Request (online application to receive an EIN)		
Tax Exempt Charity Search (online search for tax exempt organizations)		
Tax Topics (a listing of tax topics that contain general individual and business tax information)		
Where's My Refund? (check the status of your refund)		
Where's My Amended Return? (check the status of your amended return (1040X))		
Get Transcripts Online (online downloading of transcript or prior year return)		
Get Transcripts by Mail (online ordering of transcript or prior year return sent to you in the mail)		
EITC Assistant (helps taxpayers determine Earned Income Tax Credit eligibility)		

Directory of Tax Return Preparers (find preparers in your area who hold professional credentials recognized by the IRS)		
IRS Online Account (secure tool allowing taxpayers to view their IRS account balance, payment history, tax record information, and more)		
Get My Payment (helps taxpayers determine status of their Economic Impact payments)		

- To what extent is the question clear?
- What does it mean to you to have “heard” of these services/tools?
- To what extent are all of the services/tools clear?
Are any of the descriptions unclear?
- To what extent is it easy or difficult to respond about each service/tool?

Q16. Which of the following online tools/services are you aware of?

Tools/Services	Yes, I was aware	No, I wasn't aware
Estimating the amount of your withholding		
Requesting an Employer Identification Number		
Checking the status of your tax refund		
Checking the status of your economic impact payments		
Checking the status of an amended return		
Requesting a transcript online		
Requesting a transcript by mail		

- To what extent is the question clear?
- To what extent are all of the tools/services clear?
Are any of the tools/services unclear?
- To what extent is it easy or difficult to respond about each service/tool?
- This last question is an alternate of the previous question. Which do you prefer, and why?

Q17. Which of the following payment options have you heard of?

Payment Options	Yes, I've heard of this	No, I haven't heard of this
Pay by bank account with Electronic Federal Tax Payment System (EFTPS) (allows taxpayers to transmit regular tax payments electronically)		
Pay by bank account without registration (pay money you owe the IRS securely directly from your bank account for free)		
Pay by credit/debit card (card payment with a fee)		
Pay with cash via a retail partner		
Offer in compromise		
Short term payment plans		

Installment agreements		
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- To what extent is the question clear?
- To what extent are all of the payment options clear?
Are any of the descriptions unclear?
- To what extent is it easy or difficult to respond about each option?

Q18. In the *past 12 months*, did you do any of the following?

Communication channel	Yes	No
Called an IRS Toll-Free line		
Visited a local IRS office (Taxpayer Assistance Center, walk-in center)		
Visited the IRS website to obtain specific information. Please do not count casual browsing		
Contacted the IRS through regular mail		
Used the online chat with the IRS		
Used secure messaging with the IRS		

- To what extent is the question clear?
- To what extent are the different channels clear to you?
-Do any channels not make sense to you?
-To what extent are visiting the IRS website and online chat similar or different to you?
- To what extent is it easy or difficult to respond about each channel?

Q19. Which of the following services/tools on the IRS website did you use during this year's filing season?

Services/Tools	Yes	No
Made a payment to the IRS using the Electronic Federal Tax Payment System (EFTPS) (allows taxpayers to transmit regular tax payments electronically)		
Made a payment to the IRS using Direct Pay (pay money you owe the IRS securely directly from your bank account for free)		
Made a payment to the IRS using a credit/debit card on IRS.gov (card payment with a fee)		
IRS Online Account (secure tool allowing taxpayers to view their IRS account balance, payment history, tax records, and more)		
Interactive Tax Assistant (ITA) (asks you a series of questions that guide you to a response tailored to your situation)		
PIN (Identity Protection Personal Identification Number) Application (a unique number from the IRS used for identity theft protection)		
Tax Withholding Estimator (helps you determine whether you have the right amount of tax withheld from your paycheck)		
Online Employer Identification Number (EIN) Request (online application to receive an EIN)		

Set up a payment plan online using an Online Payment Agreement (OPA) (online application for an installment agreement)		
Tax Exempt Charity Search (online search for tax exempt organizations)		
Tax Topics (a listing of tax topics that contain general individual and business tax information)		
Where's My Refund? (check the status of your refund)		
My Amended Return? (check the status of your amended return (1040X))		
Get Transcripts Online (online downloading of transcript or prior year return)		
Get Transcripts by Mail (online ordering of transcript or prior year return sent to you in the mail)		
Earned Income Tax Credit Assistant (helps taxpayers determine Earned Income Tax Credit eligibility)		
Directory of Tax Return Preparers (find preparers in your area who hold professional credentials recognized by the IRS)		
Get My Payment (helps taxpayers determine status of their Economic Impact Payments)		

- To what extent is the question clear?
- To what extent are the services/tools clear to you?
 - Do any of the services/tools not make sense to you?
 - What about the Tax Withholding Estimator? How would you explain that in your own words?
- To what extent is it easy or difficult to respond about each service/tool?

Q20. What type of payment did you make through an Electronic Federal Tax Payment System (EFTPS)?

- 1 One-time payment of the amount owed on your tax return
- 2 Installment Agreement Payments
- 3 Quarterly Estimated Payments
- 4 An extension payment
- 5 Other (please specify): _____

- To what extent is the question clear?
- To what extent are the response options clear to you?
 - Do any of the options not make sense to you?
- To what extent is it easy or difficult to respond to the question?

Q21. What type of payment plan did you set up online?

- 1 Full pay agreement
- 2 Short-term payment plan
- 3 Regular installment agreement
- 4 Direct debit installment agreement (with payments automatically withdrawn from your bank account)

- To what extent is the question clear?

- To what extent are the response options clear to you?
 - Do any of the options not make sense to you?
 - To what extent is it easy or difficult to respond to the question?
-

Q22. What type of payment did you make through Direct Pay?

- 1 One-time payment of the amount owed on your tax return
- 2 Installment Agreement Payments
- 3 Quarterly Estimated Payments
- 4 An extension payment
- 5 Other (please specify): _____

- To what extent is the question clear?
 - To what extent are the response options clear to you?
 - Do any of the options not make sense to you?
 - To what extent is it easy or difficult to respond to the question?
-

Q23. When thinking about notices you've received from the IRS, how interested would you be in each of the following?

- 1 Accessing a digital copy of the notice on IRS.gov
- 2 Receiving email alerts from the IRS about any notice issued to you
- 3 Receiving notices only via email or an IRS online account (going paperless)
 - 1 Very interested
 - 2 Somewhat interested
 - 3 Not very interested
 - 4 Not at all interested

- To what extent is the question clear?
 - What does being "interested" mean to you?
 - To what extent are each of the sub-items clear to you?
 - Do any of them not make sense to you?
 - To what extent is it easy or difficult to respond to the question?
 - This question asks how interested you are in these things. Are the different levels of interest meaningful to you? What is the difference between very and somewhat interested, to you? How would you answer if the question asked only if you were interested, and not how much?
-

Q24. Which of the following best describes the payment / refund issue that was explained in your most recent notice?

- 1 I didn't make a payment with my return
- 2 I didn't pay the full amount due with my return
- 3 I didn't make an Installment Agreement payment
- 4 My refund was being held

- 5 My refund was used to pay an outstanding debt
- 6 I received an additional / larger refund
- 7 Confirmation/statement of a payment plan
- 8 Reminder about my installment agreement payment
- 9 Other (please specify): _____ [SMALL TEXTBOX] _____
- 77 Don't remember

- To what extent is the question clear?
- To what extent are each of the response options clear to you?
- Do any of them not make sense to you?
- To what extent is it easy or difficult to respond to the question?

Q25. In the past 12 months, did you try to get help with any of the following tax-related issues? This help could have been from the IRS or any other source.

Issues	Yes	No
Get help obtaining a form or publication		
Get help obtaining transcripts online or by mail (i.e., copies of your previous tax returns)		
Get help with tax law while preparing my return such as information on withholding, dependents, deductions, or tax credits		
Get answers to tax return preparation questions such as which forms to file, record keeping, filling out forms, how to file or how to get more help		
Get help making tax-related calculations		
Get information or assistance about an IRS notice — notices are mailed letters about issues such as balance dues, overpayments, underpayments, information about tax credits or requests for more information		
Get tax law information after filing my tax return to help me clarify the tax process or remain/become compliant such as information about estimated taxes (do <i>not</i> count contacts about IRS notices)		
Get information or assistance related to identity theft		
Get help obtaining an IP PIN (Identity Protection Personal Identification Number), a unique number from the IRS used for identity theft protection (not a PIN you choose yourself to sign a tax return)		
Get information about making payments		
Get information about a refund		
Get help obtaining an Individual or Employer Tax ID (ITIN, EIN)		
Get information about Economic Impact Payments		
Update my information with the IRS		
Other, specify: _____		

- To what extent is the question clear?
- How do you interpret the phrase “try to get help”? How would you restate that in your own words?
- To what extent are each of the issues clear to you?
- Do any of them not make sense to you?
- Was it clear here how each item was different from the others?

-For example, is it clear from the descriptions how help with tax law while preparing a return differs from getting answers to tax return preparation questions or from help making tax-related calculations?

-How about the distinction between getting information or assistance related to identity theft versus help obtaining an IP PIN, which is the unique number from the IRS used for identity theft protection?

-To what extent is it easy or difficult to respond to the question?

-Did you complete any of these tasks without help? If yes, did you consider whether to indicate you did try and get help? What circumstances would make you select yes to issues in this question? If no, imagine that you did complete a task without help. How would you have responded to the question?

Q26. Did the IRS issue you an Identity Protection Personal Identification Number (IP PIN), a unique number from the IRS used for identity theft protection? This is different from the PIN you might select yourself as a personal identifier to sign your tax documents.

- 1 Yes, the IRS issued this for me because of potential identity theft
- 2 Yes, I requested an IP PIN
- 3 No

-To what extent is the description of the IP PIN clear?

-To what extent is the question clear?

-To what extent are each of the response options clear to you?

-To what extent is it easy or difficult to respond to the question?

Q27. You indicated that you tried to get assistance to make a payment. What type of payment were you trying to make?

- 1 One-time payment to the IRS made at the time you filed
- 2 One-time payment to the IRS made after you filed
- 3 Installment Agreement Payments
- 4 Quarterly Estimated Payments
- 5 Other (please specify): _____

-To what extent is the question clear?

-To what extent are each of the response options clear to you?

How do you interpret the phrase "made at the time you filed"?

How do you interpret the phrase "made after you filed"?

-To what extent is it easy or difficult to respond to the question?

Q28. Would you consider using the IRS website for any of the following tax related activities if you needed to do each one?

Select *all* activities for which you would consider using the IRS website.

1. Get an IRS form or publication
2. Get information about completing a tax form
3. Get a transcript or prior year tax return information
4. Find an answer to a tax law question
5. Get information about tax credits and determine my eligibility
6. Get help making tax-related calculations
7. Get help preparing a tax return or form
8. File a tax return or form
9. Set up a payment plan
10. Make a payment
11. Get information about a refund
12. Respond to a notice or letter received from the IRS
13. Get information about tax credits such as EITC, child tax credit and education credit
14. Sign up for an IP PIN (Identity Protection Personal Identification Number) a unique number from the IRS used for identity theft protection
15. Update my information (e.g., name, address) with the IRS
16. None of the above [SP]

-To what extent is the question clear?

-To what extent are each of the response options clear to you?

-Do any of them not make sense?

-How do you interpret "Get help making tax-related calculations?" What does that include?

Would it include "Check you balance"? Would it include "Get withholding information"?

-To what extent is it easy or difficult to respond to the question?

Q29. Would you consider using the IRS2Go mobile app for any of the following tax related activities if you needed to do each one?

Select *all* activities for which you would consider using the IRS2Go app.

1. Get an IRS form or publication
2. Get a transcript or prior year tax return information
3. Find an answer to a tax law question
4. Get information about tax credits and determine my eligibility
5. Get help preparing a tax return or form
6. File a tax return or form
7. Set up a payment plan
8. Make a payment
9. Get information about a refund
10. Respond to a notice or letter received from the IRS
11. Sign up for an IP PIN (Identity Protection Personal Identification Number) a unique number from the IRS used for identity theft protection
12. Update my information (e.g., name, address) with the IRS
13. None of the above [SP]

-To what extent is the question clear?

-To what extent are each of the response options clear to you?

-To what extent is it easy or difficult to respond to the question?

FOR RESPONSES OF NO

-Why would you not consider using the IRS2Go app for this? Would you use a different source, not be looking for the information in the first place, some other reason? [NOTE: Use this question to ensure people are not saying “no” simply because they do not intend to do the given activity. Will not prompt for more than 2 activities.]

COGNITIVE INTERVIEW CLOSING

That concludes the interview. Thank you for your time, and for your helpful feedback on the survey questions. AmeriSpeak will deliver your incentive for participating in this interview. Note that the points will take longer to show up than for a regular survey, but you should get it within two weeks or so, probably less. On behalf of the IRS, and my company ICF, I wish to thank you for your participation today. Have a great [day/afternoon/evening].