

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

[SP, PROMPT]

S1. Who typically prepares your annual personal income tax return?

- 1 I do
- 2 Someone else
- 77 Not sure [TERMINATE]

S7.

How familiar are you with how your tax return was prepared and filed in 2022?

- 1 Very familiar
- 2 Somewhat familiar
- 3 Not very familiar [TERMINATE]
- 4 Not familiar at all [TERMINATE]

Q1a_1

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

Select all that apply

- 1 **Interactive Tax Assistant (ITA)** (asks you a series of questions that guide you to a response tailored to your situation)
- 2 **IP PIN (Identity Protection Personal Identification Number) Application** (a unique number from the IRS used for identity theft protection)
- 3 **Tax Withholding Estimator** (helps you determine whether you have the right amount of tax withheld from your paycheck)
- 4 **Online Employer Identification Number (EIN) Request** (online application to receive an EIN)
- 5 **Tax Exempt Charity Search** (online search for tax exempt organizations)
- 6 **Tax Topics** (a listing of tax topics that contain general individual and business tax information)
- 7 **Where's My Refund?** (check the status of your refund)
- 8 **Where's My Amended Return?** (check the status of your amended return (1040X))
- 9 **Get Transcripts Online** (online downloading of transcript or prior year return)
- 10 **Get Transcripts by Mail** (online ordering of transcript or prior year return sent to you in the mail)
- 11 **EITC Assistant** (helps taxpayers determine Earned Income Tax Credit eligibility)
- 12 **Directory of Tax Return Preparers** (find preparers in your area who hold professional credentials recognized by the IRS)

- 13 **IRS Online Account** (secure tool allowing taxpayers to view their IRS account balance, payment history, tax record information, and more)
 - 17 **Online Payment Agreement (OPA)** (online application for an installment agreement)
 - 18 **Online Chat with an Automated Bot**
 - 19 **Online Chat with a Live Representative**
-

[DISPLAY]
DISPLAY1.

We want to find out about your impressions of the IRS. We are partnering with the consulting firm ICF on behalf of the IRS by inviting a small number of AmeriSpeak panelists to participate in some virtual focus groups via MS Teams.

[DISPLAY3]

If you would like to participate, you will be asked to indicate when you are available between [dates]. If you would like to participate and are selected, you will participate in a call with 2-4 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 be participating in a discussion through Microsoft Teams. You will need to have your camera on throughout the discussion and be able to interact with the other group members.

You will get a chance tell us the best date/times for a focus group with ICF.

1. Yes
 2. No
-

If TZONE = 05 "(GMT-08:00) Pacific Time (US & Canada); Tijuana":

1. 6 AM - 7 AM
2. 7 AM - 8 AM
3. 8 AM - 9 AM
4. 9 AM - 10 AM
5. 10 AM - 11 AM
6. 11 AM - 12 PM
7. 12 PM - 1 PM
8. 1 PM - 2 PM
9. 2 PM - 3 PM

10. 3 PM – 4 PM

If TZONE = 07 “(GMT-07:00) Mountain Time (US & Canada)” OR 08 “(GMT-07:00) Arizona”:

1. 7 AM – 8 AM
2. 8 AM – 9 AM
3. 9 AM – 10 AM
4. 10 AM – 11 AM
5. 11 AM – 12 PM
6. 12 PM – 1 PM
7. 1 PM – 2 PM
8. 2 PM – 3 PM
9. 3 PM – 4 PM
10. 4 PM – 5 PM

If TZONE = 12 “(GMT-06:00) Central Time (US & Canada)”:

1. 8 AM – 9 AM
2. 9 AM – 10 AM
3. 10 AM – 11 AM
4. 11 AM – 12 PM
5. 12 PM – 1 PM
6. 1 PM – 2 PM
7. 2 PM – 3 PM
8. 3 PM – 4 PM
9. 4 PM – 5 PM
10. 5 PM – 6 PM

If TZONE = 13 “(GMT-05:00) Eastern Time (US & Canada)”:

1. 9 AM – 10 AM
2. 10 AM – 11 AM
3. 11 AM – 12 PM
4. 12 PM – 1 PM
5. 1 PM – 2 PM
6. 2 PM – 3 PM
7. 3 PM – 4 PM
8. 4 PM – 5 PM
9. 5 PM – 6 PM
10. 6 PM – 7 PM

[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 times for you to participate in a 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 computer with a camera.

Please select all your available dates and times.

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