

Web recruitment instrument to be administered to AmeriSpeak panelists

[DISPLAY - WINTRO_1]

Thank you for agreeing to participate in our new AmeriSpeak survey! This survey is about taxes. To thank you for sharing your opinions, we will give you a reward of 75,000 AmeriSpeak points (worth \$75!) after completing the survey. As always, your answers are confidential.

Please use the "Continue" and "Previous" buttons to navigate between the questions within the questionnaire. Do not use your browser buttons.

[SP, PROMPT]

S1.

How familiar are you with how your tax return was prepared and filed in 2021?

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

[SP]

S2.

Who usually prepares your federal income tax return?

RESPONSE OPTIONS

- 1 I do
 - 2 My spouse/partner
 - 3 Paid preparer
 - 4 Someone else
 - 77 Not sure [TERMINATE]
-

[SHOW IF S2=1 OR 2]

[SP]

Q30a.

How did you file your federal tax return this year? Was the return:

¿Cómo presentó su declaración de impuestos federales este año? La declaración fue:

- 1 Filed electronically (e-filed)

- 2 Sent by U.S. mail or commercial delivery service
 - 3 Delivered in person
 - 77 Don't know
-

[MP; PROMPT]

S3.

Have you used any of the following to get information from the IRS?

Please check all that apply.

- 1. IRS website (IRS.gov)
 - 2. IRS social media
 - 3. IRS toll-free phone line
 - 4. An IRS office
 - 5. Sending mail to the IRS
 - 6. Something else
 - 7. I have not used any of these
-

Q1a_1

Which of the following IRS services and programs have you heard of?

Please check all that apply.

- 1 Interactive Tax Assistant (ITA)
 - 2 Tax Withholding Estimator
 - 3 Tax Exempt Charity Search
 - 4 Where's My Refund?
 - 5 Get Ready for Taxes
 - 6 Child Tax Credit Update Portal
-

S1a.

When did you file your Federal Income Tax Return this year? <u>Your best guess is fine.</u>

CAWI RESPONSE OPTIONS

- 1 Before February 15
 - 2 Between February 15 and February 28
 - 3 Between March 1 and March 15
 - 4 Between March 16 and March 31
 - 5 Between April 1 and April 18
 - 6 After April 18
 - 7 I have not filed yet this year
-

[SP]

Q43b.

When you prepared your federal tax return this year, did you get a refund, owe money or neither?

- 1 Got a refund
 - 2 Owed money [TERMINATE]
 - 3 Neither [TERMINATE]
 - 77 Don't know [TERMINATE]
-

Q47

How did you receive your refund this year?

Select <i>all</i> that apply

- 1 Direct deposit
 - 2 Paper check
 - 3 Prepaid credit or debit card
 - 4 Tax-time financial product (Refund advance, Refund transfer, Refund anticipation loan, etc.)
 - 5 Government Savings Bond
 - 6 Other
-

[DISPLAY]
DISPLAY1.

We want to find out about your experience filing taxes. 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 focus groups via phone.

[DISPLAY]
DISPLAY2.

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]
S4.

Are you willing to participate in this focus group? You will need to have access to a phone at the time of the group.

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

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

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
11. 4 PM - 5 PM

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

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
11. 5 PM - 6 PM

If TZONE = 13 "(GMT-05:00) Eastern 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
- 11. 6 PM – 7 PM

[SHOW IF S4=1]

[MP;GRID]

S5.

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 you be available to be interviewed? Keep in mind, you will want 1 hour in a quiet place with access to a telephone.

Please select all your available dates and times.

Date	[time1]	[time2]	[time3]	[time4]	[time5]	[time6]	[time7]	[time8]	[time9]	[time10]	[time11]
TBD	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TBD	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TBD	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TBD	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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TBD	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

[IF S4=1; DISPLAY3]

Thank you for your interest in participating in a focus group with researchers from ICF!

If you are selected, the AmeriSpeak Tax Tools Survey Team will send you an email to let you know the date and telephone information of your focus group. Be sure to look out for an email so you don't miss out on this opportunity to help us understand taxpayers' experiences!

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests along with the address where you can send comments regarding the study. You are not required to respond unless a currently valid OMB approval number is displayed. The OMB number for this study 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.