INTERNAL REVENUE SERVICE OMB Control Number: 1545-2256

INSTRUMENT 07

Individual and Household Digital Feedback Participant Screener

Feedback activity: [INSERT EXACT IRS DIGITAL SERVICE, TASK, CONCEPT, OR PROTOTYPE]

Session format and length: [INSERT REMOTE, TELEPHONE, OR IN-PERSON FORMAT] / [INSERT DURATION]

Screening dates: [MM/DD/YYYY - MM/DD/YYYY]

Thank you for your interest in an IRS digital feedback activity. These questions help us determine whether the activity matches your experience and help us recruit a varied group of participants. The screener is voluntary and should take about 5 minutes. You may skip any question or stop at any time, and your decision will not affect your taxes or access to IRS services. The screener does not ask for your name. If you qualify and choose to continue, contact and scheduling information will be collected separately.

Important: Do not include names; SSNs, TINs, or EINs; passwords or verification codes; contact information; account, card, notice, or case numbers; or other specific tax-account information.

Paperwork Reduction Act Burden Statement. Public reporting burden for this collection of information is estimated to average 5 minutes per response. An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless it displays a valid OMB control number. Send comments regarding this burden estimate or any other aspect of this collection of information to the Internal Revenue Service, Office of Online Services, User Experience Services, ashley.n.webb2@irs.gov. OMB Control Number 1545-2256.

Screening questions

Programming notes appear in gray italics and are not shown to respondents.

Q1. Are you 18 years of age or older?

☐ Yes
☐ No
☐ Prefer not to answer

If “No” or “Prefer not to answer,” show the not-eligible closing message.

Q2. Which of the following describes your current or former work relationship with the IRS or the U.S. Department of the Treasury?

☐ I currently work for the IRS
☐ I currently work for another Treasury office or bureau
☐ I currently work for a contractor supporting the IRS or Treasury
☐ I previously worked for the IRS or Treasury
☐ None of these
☐ Prefer not to answer

Current IRS or Treasury employees and current support contractors are not eligible for this external screener. Former personnel may continue when allowed by the approved quota plan.

Q3. During the past 12 months, which of the following federal tax activities applied to you? Select all that apply.

☐ I handled or helped handle federal taxes for myself or my household
☐ I helped another person with a federal tax task outside a professional role
☐ I used an IRS digital service to look for information or decide what to do
☐ None of these
☐ Prefer not to answer

If “None of these” or “Prefer not to answer,” show the not-eligible closing message. Treat the final two options as exclusive.

Q4. Which statement best describes your experience with [INSERT SERVICE OR EXPERIENCE] during the past 12 months?

☐ I used it and completed at least part of a task
☐ I tried to use it but could not access it or complete the task
☐ I knew about it but used another IRS service or channel instead
☐ I have not used it, but I may reasonably need it during the next 12 months
☐ It is not relevant to me
☐ I am not sure

The first four responses may qualify. If "It is not relevant to me," show the not-eligible closing message. Use "I am not sure" only when the approved activity includes a prospective-user or account-status-uncertain group.

Q5. During the past 12 months, which federal tax tasks did you try to complete online for yourself, your household, or another person you were helping? Select all that apply.

☐ File, prepare for, or plan an individual tax return
☐ Check a return, refund, amended return, or verification status
☐ Make a payment, view a balance, manage a payment plan, or handle estimated taxes
☐ Understand or respond to an IRS notice, letter, penalty, debt, case, or unresolved issue
☐ View or request transcripts, records, forms, or other documents
☐ Create an account, sign in, verify identity, recover access, or protect an account
☐ Find forms, instructions, publications, official guidance, or general tax information
☐ Find help, an appointment, a location, or the right service channel
☐ Another general federal tax task
☐ None of these
☐ Not sure

Treat the final two options as exclusive. Require at least one relevant task unless the approved activity includes prospective users.

Q6. Which of those tasks was most important or most recent for you?

☐ Carry forward the task categories selected in Q5
☐ Not sure

Q7. When did you most recently try to complete that task?

☐ Within the past 30 days
☐ 2 to 3 months ago
☐ 4 to 6 months ago
☐ 7 to 12 months ago
☐ I have not tried it yet
☐ Not sure

Q8. What happened with that task?

☐ I completed it online
☐ I partly completed it online
☐ I could not complete it online
☐ It is still in progress
☐ I used another channel instead
☐ I have not tried it yet
☐ Not sure

Q9. Which device do you use most often for IRS digital tasks?

☐ Smartphone
☐ Tablet
☐ Laptop
☐ Desktop computer
☐ Shared or public computer
☐ I usually get help from someone using their device
☐ Another device
☐ Not sure

Q10. Which of the following, if any, describe how you use websites, apps, or digital services? Select all that apply.

☐ I use a screen reader
☐ I use screen magnification, enlarged text, or high-contrast settings
☐ I use a keyboard without a mouse or touch input
☐ I use voice control, speech recognition, switch access, or another input method
☐ I use captions, transcripts, sign language, or text-based communication
☐ I use reading, memory, attention, or other cognitive supports
☐ I rely on another person for some digital tasks
☐ I primarily or only use a mobile device
☐ I use a shared or public device
☐ I have limited or unreliable internet access
☐ None of these

☐ Prefer not to answer

Use these answers for inclusion, accessibility planning, and quotas. Do not exclude someone solely because one of these applies.

Q11. Which language would you prefer to use for this feedback activity?

☐ English
☐ Spanish
☐ Another language
☐ No preference
☐ Prefer not to answer

Offer only languages supported by the approved fielding plan. Document any language limitation; do not treat it as a general disqualifier.

Q12. Would you be able to participate in a [INSERT FORMAT] feedback session lasting about [INSERT DURATION] during [INSERT DATE OR TIME WINDOW]?

☐ Yes
☐ Yes, with an accommodation or scheduling adjustment
☐ No
☐ Not sure

If “No,” show the not-eligible message only when no other approved format or time is available. Collect detailed scheduling information separately.

Q13. Would any of the following help you participate? Select all that apply.

☐ Captions, text chat, or text-based communication
☐ A sign language interpreter
☐ Materials compatible with a screen reader, keyboard, magnification, or another assistive technology
☐ Additional time, pauses, or breaks
☐ Telephone or in-person participation instead of video
☐ Another adjustment that can be discussed with the scheduler
☐ No adjustment needed
☐ Not sure
☐ Prefer not to answer

Do not ask for a medical diagnosis. Keep detailed accommodation information with authorized scheduling or accessibility staff, not in the routine response file.

Q14. This feedback activity may record [INSERT AUDIO, VIDEO, SCREEN, OR INTERACTION DATA]. Which option best describes your preference?

☐ I am willing to participate with the described recording
☐ I would participate in a notes-only session if available
☐ I am not willing to participate if recording is required
☐ I am not sure and would like more information

Show this question only when recording is part of the approved activity. This is an initial preference, not final consent. Reconfirm consent at the session and offer a notes-only option when feasible.

Programming and disposition instructions - not shown to respondents

Disposition	Fixed rule and use
QUALIFY	Q1 = Yes; Q2 does not indicate current IRS/Treasury employment or support-contractor work; Q3 confirms a relevant individual or household context; Q4 and Q5 confirm a relevant current, attempted, or approved prospective experience; and Q12 confirms an available participation path.
QUOTA_HOLD	The person is eligible, but the applicable task, device, language, access-context, success/failure, or other approved quota is full.
INELIGIBLE	A fixed required criterion is not met. Do not infer tax status or account eligibility from the disposition.
DECLINED	The person chooses not to continue. Do not retain unnecessary screening information.
BREAKOFF	The person begins but does not finish. Count the response for burden reporting and retain only what is permitted by the approved retention plan.
CONTACT SEPARATION	Names, email addresses, telephone numbers, incentive-payment information, and detailed scheduling or accommodation information are collected in a separate approved system and linked only by a study-specific identifier when necessary.

Respondent-facing closing messages

Condition	Message shown
Eligible or quota available	Thank you. Based on your answers, you may be eligible for this feedback activity. If you choose to continue, contact and scheduling information may be requested in a separate approved system.
Eligible but quota full	Thank you for your interest. The current participant group is full, but your response has been recorded as eligible for this activity.
Not eligible	Thank you for your interest. This feedback activity is not the right fit based on the participant criteria. Your decision to participate or not participate will not affect your taxes or access to IRS services.
Declined or breakoff	Thank you. You may stop at any time. Information that is no longer needed will be handled according to the approved retention and deletion procedures.