INTERNAL REVENUE SERVICE **OMB Control Number: 1545-2256**

INSTRUMENT 08

Business Digital Feedback Participant Screener

Feedback activity: [INSERT EXACT IRS BUSINESS 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 for business users. These questions help us determine whether the activity matches your role and 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 a business tax account or access to IRS services. The screener does not ask for your name or business name. If you qualify and choose to continue, contact and scheduling information will be collected separately.

Important: Do not include business or client names; SSNs, TINs, or EINs; passwords or verification codes; contact information; account, card, notice, or case numbers; or other specific business or 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. Which of the following describes your relationship to a business or organization for which you handle federal tax work? Select all that apply.

☐ Sole proprietor or single-owner business
☐ Partner, shareholder, member, or owner
☐ Officer or other person responsible for the organization
☐ Employee involved in finance, accounting, payroll, or tax work
☐ Employee or other person with assigned online-account access
☐ Representative of a tax-exempt organization or government entity
☐ External tax professional working only for clients
☐ Another business or organization role
☐ None of these
☐ Prefer not to answer

If “External tax professional working only for clients” is the only applicable role, route to the Tax Professional Participant Screener. If “None of these” or “Prefer not to answer,” show the not-eligible closing message. Treat the final two options as exclusive.

Q4. Which business federal tax tasks did you handle or try to handle during the past 12 months? Select all that apply.

☐ View balances, payments, payment plans, or payment history
☐ Make or manage a payment or payment plan

☐ Prepare, file, or track business tax forms or returns
☐ View or respond to notices, correspondence, or unresolved issues
☐ View or request transcripts, records, compliance reports, or certificates
☐ Update business or organization information
☐ Manage access, roles, approvals, or assigned users
☐ Authorize a third party or tax professional
☐ Handle payroll or employment tax work
☐ Handle tax-exempt or government-entity tax work
☐ Work across several businesses or a high volume of transactions
☐ Another business-tax task
☐ None of these
☐ Not sure

Treat the final two options as exclusive. Require at least one relevant task.

Q5. Which statement best describes your experience with [INSERT BUSINESS SERVICE OR EXPERIENCE] during the past 12 months?

☐ I used it and completed at least part of a business 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 my role may reasonably require it during the next 12 months
☐ It is not relevant to my business role
☐ I am not sure

The first four responses may qualify. If the service is not relevant, 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.

Q6. Which of the business-tax tasks selected in Q4 was most important or most recent?

☐ Carry forward the selected task categories
☐ Not sure

Q7. Which of the following best describes your business-account access or responsibility? Select all that apply.

☐ I have or expect full access for the business or organization
☐ I manage or help manage who can access the account
☐ I have assigned or designated access for specific work
☐ I have or expect limited access as a partner, shareholder, or other limited owner
☐ I am eligible for business-tax work but have not used the applicable online account
☐ I do not know what access I have
☐ None of these

Use for routing and quotas. Do not request access codes, EINs, or business-account identifiers.

Q8. What type of business or organization do you work with for this task? Select all that apply.

☐ Sole proprietorship or single-member LLC
☐ Partnership or multi-member LLC
☐ S corporation
☐ C corporation
☐ Tax-exempt organization
☐ Federal, state, local, or tribal government entity
☐ Estate or trust
☐ Another entity type
☐ Not sure
☐ Prefer not to answer

Use for quotas and analysis. Confirm current service eligibility before fielding; this answer does not establish eligibility for a particular IRS account feature.

Q9. For how many businesses or organizations do you personally handle federal tax or online-account work?

☐ One
☐ Two or three
☐ Four to ten
☐ Eleven or more
☐ Not sure
☐ Prefer not to answer

Q10. When did you most recently try to complete the primary business-tax 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

Q11. 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

Q12. Which device do you use most often for IRS business digital tasks?

☐ Smartphone
☐ Tablet
☐ Laptop
☐ Desktop computer
☐ Shared or public computer
☐ Another device
☐ Not sure

Q13. Which of the following, if any, describe how you use websites, apps, or digital services? Select all that apply.

☐ I use a screen reader, magnification, enlarged text, or high-contrast settings
☐ I use a keyboard without a mouse, voice control, 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 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.

Q14. 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

Q15. 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 diagnosis. Keep detailed accommodation information in the restricted scheduling or accessibility file.

Q16. 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. Reconfirm consent at the session.

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 an internal business role rather than an external tax-professional-only role; Q4 and Q5 confirm a relevant business task or approved prospective need; and Q14 confirms an available participation path.
ROUTE TO TPA	Q3 identifies only an external tax-professional role. Route to Instrument 09 rather than treating the person as a business user.
QUOTA_HOLD	The person is eligible, but the applicable role, entity, access type, task, device, success/failure, or other approved quota is full.
INELIGIBLE	A fixed required criterion is not met. Do not infer legal business authority or IRS-account eligibility from the disposition.
DECLINED / BREAKOFF	The person declines or does not finish. Count the response for burden reporting and retain only what is permitted by the approved retention plan.
CONTACT SEPARATION	Do not place names, business names, email addresses, telephone numbers, incentive-payment information, or detailed scheduling or accommodation information in the analytic screener file.

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.