
Attachment A: The CATI Survey

INTRODUCTION

Intro 1. Hello, this is _____ calling from ICF Macro on behalf of the Internal Revenue Service. May I please speak with [NAME]?

The IRS has asked us to conduct a brief survey to gather feedback on how they can improve the services and products they provide to taxpayers like you. The survey should take no more than five minutes. I want to assure you that your answers will be held private to the extent covered by law. No identifying information will be associated with your responses. May we continue?

PART 1

A1. Did you use IRS resources or contact the IRS for information or help to prepare your Form 1040 Individual Income Tax Return for 2007?

- 1 Yes (Skip to A3)
- 2 No (Continue)
- 3 Not Sure/Don't Know (Continue)

A2. Have you used IRS resources or contacted the IRS for information or help to prepare your Form 1040 Individual Income Tax Return anytime in the last 5 years?

- 1 Yes (Continue)
- 2 No (Skip to B2)
- 3 Not Sure/Don't Know (Skip to B3)

A3. What were the tax topics for which you used IRS resources or contacted the IRS for information or help?
[Interviewer: DO NOT READ- Record all topics mentioned]

- | | | | |
|----|---------------------------------|----|--------------------------------------|
| 01 | Taxability of Income | 08 | Capital Gains/Losses |
| 02 | Earned Income Tax Credit (EITC) | 09 | Deductions |
| 03 | Other Tax Credits | 10 | Pension/IRA/Social Security Benefits |
| 04 | Exemptions | 11 | Small Business Income/Expenses |
| 05 | Filing Status | 12 | State Income Tax Related issues |
| 06 | Charitable Contributions | 13 | Other [RECORD VERBATIM] |
| 07 | Interest Income/Expense | 14 | Do Not Recall [Skip to B3] |

A4. What IRS resources did you use to seek information or help?
[Interviewer: DO NOT READ- Record all resources mentioned]

- | | | | |
|----|---------------------------------------|----|-------------------------------------|
| 01 | Forms and/or Instruction Booklets | 06 | E-mail Correspondence with the IRS |
| 02 | Website (irs.gov) | 07 | Written Correspondence with the IRS |
| 03 | Tax Assistance Center (Walk-In Site) | 08 | IRS Free File Site or Software |
| 04 | IRS Telephone Representative | 09 | Other [RECORD VERBATIM] |
| 05 | Automated Telephone System (Teletrax) | 10 | Do Not Recall [Skip to B3] |

PART 2

[Use B1 text if A1 = 1 and A4 = 01 – 09]

B1.. You said that you contacted the IRS for information or help. I am now going to read a list of IRS resources, which may include the resource you already mentioned. Please tell me whether or not you used any of these resources to prepare your 2007 Form 1040 Individual Income Tax Return. We want to make sure you did not forget anything. (Skip to B4)

[Use B2 text if A2 = 2]

B2. You said that you did not contact the IRS for information or help. I am now going to list some IRS resources and ask you to tell me whether or not you used any of them to prepare your Form 1040 Individual Income Tax Return. We want to make sure you did not forget anything. (Skip to B4)

[Use B3 text if A2 = 3 OR A3=14 OR A4=9]

B3. You said that you are not sure or don't recall if you contacted the IRS for information or help. I am now going to list some IRS resources and ask you to tell me whether or not you used any of them to prepare your Form 1040 Individual Income Tax Return. We want to make sure you did not forget anything. (Continue to B4)

[If any B4a – B4i = 1, continue to B5 after B4i. If all B4a – B4i = 2 or 9, skip to Closing.]

B4. [Interviewer: READ LIST]

Did you ...?

	Yes	No	Do Not Recall
a. Use Forms and/or Instruction Booklets	1	2	9
b. Use the IRS Website, also known as irs.gov	1	2	9
c. Go to a Tax Assistance Center or Walk-In Site	1	2	9
d. Talk to an IRS Telephone Representative	1	2	9
e. Use the Automated Telephone System, also known as Teletrax	1	2	9
f. Exchange e-mail Correspondence with the IRS	1	2	9
g. Exchange written Correspondence with the IRS	1	2	9
h. Use the IRS Free File Site or Software	1	2	9
i. Use Something Else [RECORD VERBATIM]	1	2	9

B5. I'm now going to list some topics you might have contacted us about. Please tell me whether you contacted the IRS for any of these topics. Do you contact the IRS regarding...?

[Interviewer: READ LIST]

Recall

	Yes	No	Do Not
a. Taxability of Income	1	2	9
b. Earned Income Tax Credit, also known as EITC	1	2	9
c. Other Tax Credits	1	2	9
d. Exemptions	1	2	9
e. Filing Status	1	2	9
f. Charitable Contributions	1	2	9
g. Interest Income or Expense	1	2	9
h. Capital Gains or Losses	1	2	9
i. Deductions	1	2	9
j. Pension, IRA, or Social Security Benefits	1	2	9
k. Small Business Income or Expenses	1	2	9
l. State Income Tax Related issues	1	2	9
m. Something Else [RECORD VERBATIM]	1	2	9

CLOSING

Those are all of the questions I have. We are required by law to report to you the OMB Control Number for this public information request. That number is 1545-1432. I can give you an address if you have any comments about the time estimate for completing the survey or about ways to improve the survey. Would you like the address?

[INTERVIEWER: If yes, read "Tax Products Coordination Committee, 1111 Constitution Avenue NW, Washington DC 20024"]

On behalf of the IRS and ICF Macro, I would like to thank you for your time and feedback. Have a great [day, evening].

Attachment B: Letter to Taxpayers with Phone Number on File

<Name>
<Address 1>
<Address 2>
<Address 3>

Dear <Taxpayer Name>:

I am writing to ask for your help with an important initiative we are undertaking to improve our service to America's taxpayers.

The IRS seeks to measure the use and effectiveness of its tax resources available to the public. ICF Macro, an independent research company, will be calling you soon to ask you to evaluate your experience using IRS resources when completing a 2007 tax return. Even if you don't think you remember what resources you used for your 2007 tax return, we hope you will still give us just a few minutes of your time. The survey should take only five minutes or less. Your opinions are important and will assist us in improving the services and products we provide to taxpayers.

The survey is strictly for research. All of your comments will be held private to the extent covered by law. No identifying information will be associated with your responses. Your responses will be combined with others to give us a better understanding of taxpayer experiences.

If you have any questions about this study, or wish to verify the IRS's sponsorship of the survey, please contact Eric Spitzer at 202-874-9844 or Eric.J.Spitzer@irs.gov.

We are committed to improving service to every taxpayer. Please help me in this effort by providing ICF Macro with your candid feedback when they call.

Sincerely,

William W. Hannon
Director, National Research Program

Attachment C: Letter to Taxpayers without Phone Number on File

<Name>
<Address 1>
<Address 2>
<Address 3>

Dear <Taxpayer Name>:

I am writing to ask for your help with an important initiative we are undertaking to improve our service to America's taxpayers.

The IRS seeks to measure the use and effectiveness of its tax resources available to the public. To help get this feedback, we have asked an independent research company, ICF Macro, to conduct a short survey with our customers.

We invite you to call this toll-free number, <toll-free number> to participate in this brief survey. This number will connect you with an ICF Macro interviewer who will ask you to evaluate your experience using IRS resources when completing a 2007 tax return. Even if you don't think you remember what resources you used for your 2007 tax return, we hope you will still give us just a few minutes of your time. The survey should take only five minutes or less. Your opinions are important and will assist us in improving the services and products we provide to taxpayers.

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We are committed to improving service to every taxpayer. Please help me in this effort by calling ICF Macro with your candid feedback.

Sincerely,

William W. Hannon
Director, National Research Program