

VITA Refund Questionnaire

The Internal Revenue Service (IRS) is working to offer better service to taxpayers. You can help in this important mission by answering the questions below about tax refund options. This voluntary survey should take approximately 2 to 5 minutes to complete. Your answers will remain private. We will not ask any information that could identify you personally, such as your name.

Please take this survey only if you:

- Got a tax refund, and
- Chose prepaid card or paper check for the refund.

1. How will you receive this year's tax refund?

- Prepaid Card _____ ➔ Please continue.
- Paper Check _____ ➔ Please continue.
- Direct Deposit _____ ➔ Stop. You do not need to continue.

2. How important were the following in your choice? Please check the box.

	Very important	Somewhat important	Only a little important	Not at all important
Convenience				
Time to get refund				
Ease of getting cash				
Safe or secure				
Fees or cost to get cash				
Ability to use anywhere				
Easily replaced if lost or stolen				
Simple to use				
What you have been used to using				
Other - please specify:				

3. Please tell us how you feel about getting your tax refund with a prepaid card or paper check.

Which is...?	Prepaid card	Paper check	Both the same
More convenient			
Faster for getting a refund			
Easier to get cash			
Safer or more secure			
Lower in fees or cost to get cash			
Able to be used in more places			
Easier to be replaced if lost or stolen			
Simpler to use			
Other - please specify:			

4. Before you came into the VITA offices, had you heard anything about getting your tax refund on a prepaid card? This might have included advertisements or news stories.
- Yes
 - No

5. Did you read any posters or flyers on the prepaid card in the VITA office?
- Yes Please continue.
 - No Go to question 8.

6. If you read any posters or flyers on the prepaid card, please rate them.

	Very	Somewhat	Only a little	Not at all
Helpful				
Easily understood				
Enough information				

7. If you have any suggestions on how to improve the posters or flyers, please describe them below:

8. Did you read any brochures on the prepaid card in the VITA office?
- Yes Please continue.
 - No Go to question 11.

9. If you read any brochures on the prepaid card, please rate them.

	Very	Somewhat	Only a little	Not at all
Helpful				
Easily understood				
Enough information				

10. If you have any suggestions on how to improve the brochures, please describe them below:

11. Did your VITA volunteer explain the differences between getting your tax refund on a prepaid card compared to a paper check?

- Yes Please continue.
- No → Go to question 14.

12. If your VITA volunteer explained the differences, please rate his or her explanation.

	Very	Somewhat	Only a little	Not at all
Helpful				
Easily understood				
Enough information				

13. If there was any information you wish had been provided by the VITA volunteer, please describe it below:

14. In the past year, have you used a store’s gift card to make a purchase?

- Yes
- No

15. Do you already have a prepaid card that can be used anywhere and allows you to add money?

- Yes
- No
- Don’t know

16. Did you receive a letter from the Department of Treasury that offered to setup an account and routing number for you to receive your tax refund?

- Yes
- No

Answers to the following questions will be used to help us understand the needs of different groups of people. Information provided will remain private.

17. Which of the following categories describes your current age?

- 17 years and under
- 18 to 24
- 25 to 34
- 35 to 44
- 45 to 54
- 55 to 64
- 65 to 74
- 75 to 84
- 85 years and over

18. What is your gender?

- Male

- Female

19. Which of the following categories describes your household income before taxes last year?

- Less than \$10,000
- \$10,000 to \$15,000
- \$15,001 to \$25,000
- \$25,001 to \$35,000
- \$35,001 to \$50,000
- \$50,001 to \$75,000
- More than \$75,000

20. Are you of Hispanic or Latino origin (ethnicity)?

- Yes
- No

21. What is your race? Please select one or more.

- White
- Black or African-American
- Asian
- Native Hawaiian or other Pacific Islander
- American Indian or Alaska Native

22. Choose the statement that best describes the language spoken in your home.

- English is the only language spoken.
- English is the language usually spoken.
- A language other than English is the language usually spoken: _____

Thank you very much for taking the time and effort to answer our questions.

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is 1545-XXXX. The time estimated for participation is 2-5 minutes. If you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to the, Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224.