OMB Package

A Customer Satisfaction Study For e-Signature

Introduction

The IRS is interested in determining current levels of customer satisfaction with e-Signature options among key stakeholder segments. In addition, the Service is interested in getting customer feedback on several possible future e-Signature options.

Key stakeholders at this time include:

- <u>Tax Return Preparers</u> Who Are EROs and prepare both Individual and Business returns
- <u>Individual Taxpayers</u> filing via e-file both Self-Select PIN Users and Practitioner PIN Users
- And <u>Software Developers</u> for IRS e-file Business and Individual Forms

Objectives of Research

The objectives of this research are to:

- Determine customer satisfaction with current e-Signature options.
- And collect stakeholder feedback on possible new options.

Methodology

This study would be conducted via telephone methodology because of the availability of phone numbers for potential respondents (and because it is unlikely they can be reached via the Internet and because it would be prohibitively expensive to conduct the survey in person, with the respondents widely dispersed). The contractor is Russell Research, Inc., and all interviewing would be conducted from its national telephone interviewing center in Wayne, NJ, using its executive staff interviewers (who are trained in both completion of ample sample sizes among small universes in the case of the Software Developers and in probing to reach below surface responses to secure deeper feedback and perceptions in the case of all interviews in this study).

Lists will be provided by the IRS for each stakeholder segment and the contractor will screen through those lists on an nth sample, random basis.

One of the segments – Software Developers – is a very small universe, and opinions from this group are being collected for directional learning only.

After completing all fieldwork, Russell will tabulate the data for each stakeholder segment and prepare a report of findings.

The survey package is being forwarded to OMB for approval. Attachment 1 contains the three separate surveys for each stakeholder group.

Sample Design

A total of 1,025 interviews will be conducted – 500 each with the Preparer and Taxpayer segments and 25 with the Software Developers.

Data Collection Date

Data will be collected via telephone by Russell Research in a 2-week period following OMB authorization (TBD).

Data to be collected

This survey will collect overall satisfaction with current e-Signature methods, open-end feedback on current options, ratings of current options, and similar measures for each of 3 potential new e-Signature options; along with respondent characteristics (for possible cross-tab purposes).

How data will be used

Data will be used to evaluate current satisfaction levels as well as possible product improvements.

How data will be analyzed

Analysis of the survey data will be conducted by Russell Research on a stakeholder-by-stakeholder basis. The 3 groups will not be combined in analysis, since they represent very different universes.

Who is conducting research?

This research will be conducted by Russell Research. Russell Research will conduct all fieldwork, tabulation, analysis and reporting, and additionally provide IRS with a raw data file in an Excel spreadsheet.

Location

This survey will be fielded via telephone interviewing from Russell's national telephone interviewing center in Wayne, NJ.

Stipend

Survey participants will not be paid a stipend for participation.

Burden Hours

The survey will take approximately 12 minutes to complete across 1,025 respondents.

Based on the in-going goal on n=1,025 ending sample size and a response rate as high as 60%, a total of 1,708 potential respondents will have to be called in order to reach the 1,025 ending sample. 1,708 minus 1,025 leaves 683 non-participants.

- The contact time to determine non-participation could be up to 1 minute, with the resulting burden for <u>non-participants</u> being 683 x 1 = 683 minutes / 60 minutes = 11.38 burden hours.
- Then, for those who do participate, the length of the survey is 12 minutes, with the time burden for that group being 1,025 x 12 minutes = 12,300 total minutes / 60 minutes = 205 burden hours.
- Thus, the <u>total burden hours for the study</u> would be (11.38 + 205 =) 216.38 hours.

Efforts to not duplicate research

This research will provide original perspective because no research currently exists on satisfaction with e-Signature, or with the possible new e-Signature options.

Privacy, Security, Disclosures, Confidentiality

Russell Research has in place strict procedures for non-disclosure of respondent information, which have been a part of its work for the IRS since the late 1990's. In addition, not even the IRS will know the identity of survey respondents as this is shielded from all view beyond the staff at Russell Research (who are trained in and monitored for adherence to Government non-disclosure procedures).

Attachment 1

Questionnaires for the survey – one for each target stakeholder group.

2006 e-Signature Customer Satisfaction Survey Taxpayer/Individual Filer Cell

RMR #TBD Summer 2006 PAGE 1 (C1)

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Hello, I am______ of Russell Research in New York, an independent national survey research firm. The internal Revenue Service has asked us to contact a sample of Taxpayers who have filed a Federal Income Tax Return electronically to get your opinions about the tax filing services provided to the public by the IRS. Your participation in this survey is entirely voluntary and your responses to questions will be kept in the strictest confidence by Russell Research. The survey should take about 10-12 minutes to complete and we'd appreciate your participation. Would you be willing to participate in the survey?

- >> IF "YES", CONTINUE.
- >> IF "NO", THANK & RECORD AS "Ref" ON LINE FOR THIS ATTEMPT IN BOX ABOVE.

IF "YES", CONTINUE SCREENING WITH

A. In filing your Federal Income Tax Return electronically, do you recall the process of signing your return electronically – specifically, do you recall (CELL 1: selecting a PIN number to serve as your electronic signature) (CELL 2: your Tax Preparer applying a PIN number to serve as your electronic signature)? (CIRCLE JUST ONE ANSWER BELOW.)

Yes (RESPONDENT QUALIFIES - CONTINUE REST OF SURVEY)	4
NO (RESPONDENT DOES NOT QUALIFY - THANK, TERM & TALLY)	3

>> IF "NO", THANK, TERM & TALLY BELOW.

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PRODUCTION: ROTATE NEXT 4 PAGES TO ASSURE EQUAL # OF 1S1 POSITION EVALUATIONS OF THE 4 E-SIGNATURE CONCEPTS.

INTERVIEWER: READ THIS INTRO TO THE CONCEPT EVALUATIONS: I'd like to describe some other possible ways that a Taxpayer might electronically sign a Federal Income Tax Return. THEN CONTINUE TO NEXT PAGE.

...40

...41

6.	Here is (the first) (the next) (the last) of the possible ways that a Taxpayer might
	electronically sign a Federal Income Tax Return. Please listen closely as I read this
	description, and then I'd like to get your feedback on it. (READ CONCEPT CLEARLY, SLOWLY $\underline{TWICE}\ \&$
	ASK FEEDBACK Qs.)

Let's call this concept"Providing Taxpay	ers With An Improved	Taxpay	rer PIN S	ystem"
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• To make it easier for Taxpayers using *e-file* to electronically sign their Federal Income Tax Return, the IRS would improve its Taxpayer PIN (Personal Identification Number) system by letting Taxpayers register and obtain a PIN that IRS would use to validate their identity. ◆ This PIN registration would also be available while using a web-based or personal computer tax preparation software.

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☐ Makes the whole Federal Tax Return filing process easier.......... 5

☐ Shows the IRS cares about making tax filing easier...... 5

12. Here is (the first) (the next) (the last) of the possible ways that a Taxpayer might electronically sign a Federal Income Tax Return. Please listen closely as I read this description, and then I'd like to get your feedback on it. (READ CONCEPT CLEARLY, SLOWLY TWICE & ASK FEEDBACK Qs.)

Let's call this one	"Providing	Taxpayers With	n A Homeland Se	ecurity Personal	Identification	Verification":
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To make it easier for Taxpayers using e-file to electronically sign their Federal Income Tax Return, the IRS would use technology developed by Homeland Security to provide you with a computer-readable identity card that would let you authorize and digitally sign an electronically filed tax return.
 Note: this would not be used for any purpose other than digitally signing an electronic tax return.

3.	How <u>appealing or unappealing</u> is the electronic signature method I just described. Do find it (READ CHOICES & CIRCLE JUST ONE ANSWER BELOW.)	you
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	Yes (ASK Q16 NEXT)	2
	No (SKIP TO Q17 NEXT)	2
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18.	Here is (the first) (the next) (the last) of the possible ways that a Taxpayer might
	electronically sign a Federal Income Tax Return. Please listen closely as I read this
	description, and then I'd like to get your feedback on it. (READ CONCEPT CLEARLY, SLOWLY TWICE &
	ASK FEEDBACK Qs.)

Let's call this one"Providing Taxpayers The Opportunity To Use A Digital Certific

• To make it easier for Taxpayers using *e-file* to electronically sign their Federal Income Tax Return, the IRS would recognize the use of a Digital Certificate. • A digital certificate is similar to an electronic "credit card" that establishes your identity and your digital signature when you conduct transactions on the Internet. • The certificate would be issued by a trusted third-party and would contain your name, a serial number, expiration dates, and your digital signature.

digita	al signature.								
9.	How appealing or unappealing is the electronic signature method I just described. Do you find it (READ CHOICES & CIRCLE JUST ONE ANSWER BELOW.)								
	Extremely Appealing					5			
	Very Appealing								
	Somewhat Appealing								
	Somewhat Unappealing								
	Or Very Unappealing								
	(DON'T READ, BUT CIRCLE IF)	Jon't Kn	ow/Hetus	sea		y			
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	(PROBE FURTHER WITH:) Anything else?		_		_	_			
١.	In your opinion, can this method of electronic signing improved in any way? (CIRCLE ANSWER BELOW.)	of a Fe	ederal In	come 1	ax Retu	n be			
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	No (SKIP TO Q23 NEXT)								
	(DON'T READ) Don't Know/Re	efused (SKIP TO Q	23 NEXT)		y			
2.	(IF "YES" TO Q21, ASK) In what specific ways can it be impro	<u>ved</u> ? (El	NTER <u>VER</u>	BATIM & I	PROBE.)				
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	Assures that a Federal Tax Return is processed quickly 5	4	3	2	1	y			
	Is easy to use, with no hassle5	4	3	2	1	У			
	Is a private and secure way to sign a Federal Tax Return	4	3	2	1	У			
	Saves you time in filing your Federal Tax Return 5	4	3	2	1	У			

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24.	Here is (the first) (the next) (the last) of the possible ways that a Taxpayer might
	electronically sign a Federal Income Tax Return. Please listen closely as I read this
	description, and then I'd like to get your feedback on it. (READ CONCEPT CLEARLY, SLOWLY <u>TWICE</u> & ASK FEEDBACK Qs.)
	non i Elbanon de-j

Let's call this concept"Providing Taxpayers With Credit Card Authentication"
--

• To make it easier for Taxpayers using *e-file* to electronically sign their Federal Income Tax Return, the IRS would provide Taxpayers with Credit Card Authentication. • Credit Card Authentication means that the IRS would use a third-party to verify information from your credit card or debit card, along with information from your tax return, and know for sure that it is you who is signing your electronic tax return.

Extremely Appealing		g or unappealing is the electronic signature method I just described. Do you CHOICES & CIRCLE JUST ONE ANSWER BELOW.)
Very Appealing		Extremely Appealing5
Somewhat Appealing		, ,,
Somewhat Unappealing		
Or Very Unappealing		
What, if anything, do you think you would like about this method of electronically signing a Federal Income Tax Return? (ENTER VERBATIM & PROBE.) [PROBE FURTHER WITH:) Anything else? [In your opinion, can this method of electronic signing of a Federal Income Tax Return be improved in any way? (CIRCLE ANSWER BELOW.) Yes (ASK Q22 NEXT)		
In your opinion, can this method of electronic signing of a Federal Income Tax Return be improved in any way? (CIRCLE ANSWER BELOW.) Yes (ASK Q22 NEXT)		(DON'T READ, BUT CIRCLE IF) Don't Know/Refusedy
In your opinion, can this method of electronic signing of a Federal Income Tax Return be improved in any way? (CIRCLE ANSWER BELOW.) Yes (ASK Q22 NEXT)		
Yes (ASK Q22 NEXT)	(PROBE FURTHE	R WITH:) Anything else?
(ASK ALL:) Based on the description you just heard, please rate the extent to which you agree or disagree that this method of electronically signing a Federal Income Tax Return would have each of the following characteristics. Please use the same agreement rating scale as before, that is, "Agree Completely", "Agree Mostly", "Agree Somewhat", "Disagree Somewhat", or "Disagree Completely". Let's start with this first characteristic(START AT PRE-CHECK, READ CHARACTERISTIC, CIRCLE RATING AND THEN CONTINUE UNTIL THIS SIGNATURE METHOD HAS BEEN RATED ON ALL CHARACTERISTICS,) (NOTE: DO NOT OFFER "DON'T KNOW"/"CANT SAY" AS A CHOICE BUT CIRCLE IT IF RESPONDENT CANNOT RATE THE CHARACTERISTIC.)		
(ASK ALL:) Based on the description you just heard, please rate the extent to which you agree or disagree that this method of electronically signing a Federal Income Tax Return would have each of the following characteristics. Please use the same agreement rating scale as before, that is, "Agree Completely", "Agree Mostly", "Agree Somewhat", "Disagree Somewhat", or "Disagree Completely". Let's start with this first characteristic(START AT PRE-CHECK, READ CHARACTERISTIC, CIRCLE RATING AND THEN CONTINUE UNTIL THIS SIGNATURE METHOD HAS BEEN RATED ON ALL CHARACTERISTICS.) (NOTE: DO NOT OFFER "DON'T KNOW"/"CANT SAY" AS A CHOICE BUT CIRCLE IT IF RESPONDENT CANNOT RATE THE CHARACTERISTIC.)		Yes (ASK Q22 NEXT)
disagree that this method of electronically signing a Federal Income Tax Return would have each of the following characteristics. Please use the same agreement rating scale as before, that is, "Agree Completely", "Agree Mostly", "Agree Somewhat", "Disagree Somewhat", or "Disagree Completely". Let's start with this first characteristic(START AT PRE-CHECK, READ CHARACTERISTIC, CIRCLE RATING AND THEN CONTINUE UNTIL THIS SIGNATURE METHOD HAS BEEN RATED ON ALL CHARACTERISTICS,) (NOTE: DO NOT OFFER "DON'T KNOW"/"CANT SAY" AS A CHOICE BUT CIRCLE IT IF RESPONDENT CANNOT RATE THE CHARACTERISTIC.)	improved in a	Yes (ASK Q22 NEXT)
disagree that this method of electronically signing a Federal Income Tax Return would have each of the following characteristics. Please use the same agreement rating scale as before, that is, "Agree Completely", "Agree Mostly", "Agree Somewhat", "Disagree Somewhat", or "Disagree Completely". Let's start with this first characteristic(START AT PRE-CHECK, READ CHARACTERISTIC, CIRCLE RATING AND THEN CONTINUE UNTIL THIS SIGNATURE METHOD HAS BEEN RATED ON ALL CHARACTERISTICS,) (NOTE: DO NOT OFFER "DON'T KNOW"/"CANT SAY" AS A CHOICE BUT CIRCLE IT IF RESPONDENT CANNOT RATE THE CHARACTERISTIC.)	improved in an	Yes (ASK Q22 NEXT)
each of the following characteristics. Please use the same agreement rating scale as before, that is, "Agree Completely", "Agree Mostly", "Agree Somewhat", "Disagree Somewhat", or "Disagree Completely". Let's start with this first characteristic(START AT PRE-CHECK, READ CHARACTERISTIC, CIRCLE RATING AND THEN CONTINUE UNTIL THIS SIGNATURE METHOD HAS BEEN RATED ON ALL CHARACTERISTICS,) (NOTE: DO NOT OFFER "DON'T KNOW"/"CANT SAY" AS A CHOICE BUT CIRCLE IT IF RESPONDENT CANNOT RATE THE CHARACTERISTIC.)	(IF "YES" TO Q21,	Yes (ASK Q22 NEXT)
that is, "Agree Completely", "Agree Mostly", "Agree Somewhat", "Disagree Somewhat", or "Disagree Completely". Let's start with this first characteristic(START AT PRE-CHECK, READ CHARACTERISTIC, CIRCLE RATING AND THEN CONTINUE UNTIL THIS SIGNATURE METHOD HAS BEEN RATED ON ALL CHARACTERISTICS,) (NOTE: DO NOT OFFER "DON'T KNOW"/"CANT SAY" AS A CHOICE BUT CIRCLE IT IF RESPONDENT CANNOT RATE THE CHARACTERISTIC.)	(IF "YES" TO Q21, (PROBE FURTHE	Yes (ASK Q22 NEXT)
RESPONDENT CANNOT RATE THE CHARACTERISTIC.)	(IF "YES" TO 021, (PROBE FURTHE (ASK ALL:) Based disagree that	Yes (ASK Q22 NEXT)
Agree Agree Disagree Disagree DK/Can'	(IF "YES" TO 021, (PROBE FURTHE (ASK ALL:) Based disagree that if each of the foothat is, "Agree" "Disagree Core CHARACTERISTIC	Yes (ASK Q22 NEXT)
Completely Mostly Somewhat Completely Say	(IF "YES" TO 021, (PROBE FURTHE (ASK ALL:) Basedisagree that the each of the found that is, "Agree" Disagree Core Characteristic ALL Characteris	Yes (ASK Q22 NEXT)

☐ Shows the IRS cares about making tax filing easier...... 5

Makes the whole Federal Tax Return filing process easier........ 5

30.	These last few ques	tions are <u>for classific</u>	ation purposes only. Like all of your previous	PAGE 7
	responses, these too male or female? (CIRC		ctest of confidence. First, for the record, are you	
		Malo		60
				00
			Voice	
31.	Which of the followin	g best describes your <u>a</u>	ge? (CIRCLE ANSWER BELOW.)	
		Under 18	1	61
			2	
			3	
		••	4	
			5	
			6	
			7	
			IF:) Refused 9	
32.	Including yourself ho	,	tly live in your household?	
JZ.	melading yoursen, <u>ne</u>	W many people curren	#	62-63
			(ENTER EXACT NUMBER)	02-00
IF "MO	RE THAN 1" IN Q26, ASK:		,	
33.	Are there any children	ı in the household who	are(READ LIST & CIRCLE ALL THAT APPLY.)	
			Under Age 6 1	64
			Ages 6 to 12	
			Ages 13 to 18 3	
			No children present0	
ASK A			,	
34.	What is your marital s	tatus? Is it (READ CHO	DICES.)	
			Married 1	65
			Single But Living With Someone2	
			Single & Never Married3	
			Or, Separated, Divorced or Widowed4	
			(DON'T READ BUT CIRCLE IF:) Refusedy	
35.	Are you currently em	oloyed, either full-time	or part-time? (CIRCLE ANSWER BELOW.)	
		Vos	1	66
			2	00
			#F:) Refused	
36.	What was the last gra	de of <u>education</u> you co	mpleted. (DON'T READ LIST.)	
	Some High School Or Les	ss1	College Undergraduate Degree (BS/BA/etc.)	67
	High School Graduate	2	Post-Graduate College Degree (MS/MBA/etc.) 6 (DON'T READ BUT CIRCLE IF:) Refusedy	

CLOSING COMMENTS

37.

Attended College But Did Not Complete Degree ... 4

That completes the survey. We are required by law to report to you the OMB (Office Of Management and Budget) Control Number for this public information request. That number is 1545-1432 In addition, if you have any comments about the time estimate to complete the survey or ways to improve the survey, you may write to the IRS. Would you like the address? (IF YES, ADDRESS IS...) IRS Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224.

Finally, for classification purposes only, please tell me which of the following categories best

...68

OMB # T80 RUSSELL RESEARCH, INC 1775 BROADWAY, STE 630 NY NY 10019-1903

2006 e-Signature Customer Satisfaction Survey Software Developer Cell

RMR #T8D Summer 2006 PAGE 1 (C1)

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RESPONDEN	T ID#							(1-5)	
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AFTER REACHING POTENTIAL RESPONDENT, INTRODUCE YOURSELF WITH:

Hello, I am______of Russell Research in New York, an independent national survey research firm. The Internal Revenue Service has asked us to contact a sample of Software Developers who work on electronic filing products, or "e-file" and get your opinions about electronic filing – specifically about the electronic signature or "e-Signature" options currently available. Your participation in this survey is entirely voluntary and your responses to questions will be kept in the strictest confidence by Russell Research and never identified with you personally or with your company. The survey should take about 10 minutes to complete and we'd appreciate your participation. Would you be willing to participate in the survey?

- >> IF "YES", CONTINUE.
- >> IF "NO", THANK & RECORD AS "Ref" ON LINE FOR THIS ATTEMPT IN BOX ABOVE.

IF "YES", CONTINUE WITH THE REMAINDER OF THE QUESTIONNAIRE, WHICH CONTINUES ON THE NEXT PAGE.

		ction to it, <u>how satisfied are yo</u> choices offered by the IRS? A	re voi				
	ONE ANSWER BELOW.)	choices offered by the ins:	ue you	···· (HEAD	CHOICES	α CINCLE	3031
	,	Completely Satisfied					5
		Mostly Satisfied					4
		Somewhat Satisfied					
		Somewhat Dissatisfied					
		Or Very Dissatisfied					
		(DON'T READ, BUT CIRCLE IF) D	on't Kn	ow/Refus	ed		у
 	n your opinion, can the IRS	6's current e-Signature method	ds be <u>i</u>	mproved	in any	way? (C	IRCLE
		Yes (ASK Q3 NEXT)					1
		No (SKIP TO Q4 NEXT)					
		(DON'T READ) Don't Know/Ref	used (8	SKIP TO Q4	NEXT)		у
_			_				
(F	PROBE FURTHER WITH:) How e l	se?					
_ (<u>s</u> _ () ()	ASK ALL:) Please rate the extatements about the IRS's 'Agree Completely'', "Agree Completely". Let's start with CONTINUE UNTIL THIS SIGNATURE		isagre Here, "Disag	e with ear please uree Some	ach of 1 ise a ra what", RCLE RA	the folio iting sca or "Disa TING AND NOTE: DO	wing le of gree THEN
- (/ SI " C C C	ASK ALL:) Please rate the extatements about the IRS's Agree Completely", "Agree Completely". Let's start with ONTINUE UNTIL THIS SIGNATURE TOON'T KNOW"/"CANT SA	tent to which you agree or decurrent e-Signature methods. Mostly", "Agree Somewhat", h(START AT PRE-CHECK, READ CHECK METHOD HAS BEEN RATED ON	lisagre Here, "Disag IARACTI ALL CHA T IF R	e with ear please uree Some	ach of 1 ise a ra ewhat", RCLE RA TICS,) (IT CANN Disagree	the folio ting sca or "Disa TING AND NOTE: DO OT RATE Disagree	wing le of gree THEN NOT THE
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- (/ SI; CCCC A	ASK ALL:) Please rate the extatements about the IRS's Agree Completely", "Agree Completely". Let's start with CONTINUE UNTIL THIS SIGNATURE PREER "DON'T KNOW"/"CANT SIGNATURE CHARACTERISTIC.)	tent to which you agree or decurrent e-Signature methods. Mostly", "Agree Somewhat", " 1(START AT PRE-CHECK, READ CHEMETHOD HAS BEEN RATED ON AY" AS A CHOICE BUT CIRCLE IN Agree Completely astry IRS can do right now	lisagre Here, "Disag ARACTI ALL CHA T IF R Agree Mostly	e with ear please uree Some ERISTIC, CI ARACTERIS ESPONDEN Agree Somewhat	ach of the second of the secon	the folio ting sca or "Disa TING AND NOTE: DO OT RATE Disagree Completely	wing ile of gree THEN NOT THE DK/Can Say
- (/ SI CCCC	ASK ALL:) Please rate the extatements about the IRS's Agree Completely", "Agree Completely". Let's start with CONTINUE UNTIL THIS SIGNATURE PREPARACTERISTIC.) Are accepted throughout the industration as the best the core easy for customers to use	tent to which you agree or decurrent e-Signature methods. Mostly", "Agree Somewhat", " 1(START AT PRE-CHECK, READ CHE METHOD HAS BEEN RATED ON AY" AS A CHOICE BUT CIRCLE II Agree Completely Stry IRS can do right now	lisagre Here, "Disag ARACTI ALL CHA T IF R Agree Mostly 4	e with ear please use Some ERISTIC, CI ARACTERIS ESPONDEN Agree Somewhat	ach of 1 Ise a ra ewhat", RCLE RA ETICS,) (IT CANN DISAgree Somewhat 9	the folionting sca or "Disa TING AND NOTE: DO OT RATE Disagree Completely	wing ile of gree THEN NOT THE DK/Car Say y
- (AST COOCI A AI AI	ASK ALL:) Please rate the extatements about the IRS's Agree Completely", "Agree Completely". Let's start with ONTINUE UNTIL THIS SIGNATURE FER "DON'T KNOW"/"CANT SHARACTERISTIC.) The accepted throughout the induse as the best the releasy for customers to use	tent to which you agree or decurrent e-Signature methods. Mostly", "Agree Somewhat", " 1(START AT PRE-CHECK, READ CHEMETHOD HAS BEEN RATED ON AY" AS A CHOICE BUT CIRCLE II Agree Completely Stry IRS can do right now	lisagre Here, "Disag ARACTI ALL CHA T IF R Agree Mostly 4 4 4	e with ear please use Some Somewhat 3 3 3	ach of fise a racewhat", RCLE RACETICS,) (IT CANN Disagree Somewhat 9	the folionting sca or "Disa TING AND NOTE: DO OT RATE Disagree Completely	wing ile of igree THEN NOT THE DK/Car Say y y

PRODUCTION: ROTATE NEXT 4 PAGES TO ASSURE EQUAL # OF 151 POSITION EVALUATIONS OF THE 4 E-SIGNATURE CONCEPTS

INTERVIEWER: READ THIS INTRO TO THE CONCEPT EVALUATIONS: I'd like to describe some other possible e-Signature methods that the IRS might offer. THEN CONTINUE TO NEXT PAGE.

5.	Here is (the first) (the next) (the last) of the possible e-Signature methods that the
	IRS might offer. Please listen closely as I read this description, and then I'd like to get your
	feedback on it. (READ CONCEPT CLEARLY, SLOWLY TWICE & ASK FEEDBACK Qs.)

Let's call this concept.	"An :	Improved	PIN S	system":
--------------------------	-------	----------	-------	----------

• To make it easier to use *e-file*, the IRS would improve and expand the IRS Personal Identification Number (PIN) system to let Taxpayers register and obtain a PIN that IRS would use to validate their identity. • This PIN registration would also be available while using a web-based or personal computer tax preparation software.

Thinking from the perspective of a Software Developer, overall how <u>appealing</u> or <u>unappealing</u> is the e-Signature method I just described. Do you find it (READ CHOICES & CIRCLE JUST ONE ANSWER BELOW.)	
Extremely Appealing5	
Very Appealing4	
Somewhat Appealing3	
Somewhat Unappealing2	
Or Very Unappealing1	
(DON'T READ, BUT CIRCLE IF) Don't Know/Refusedy	
I know you've heard only a rough sketch of the idea of this e-Signature method, but based on what you heard, what are your <u>first thoughts about how this method might work</u> for you as a developer of e-file software? (ALLOW TIME FOR REFLECTION AND THEN ENTER VERBATIM & PROBE.)	
<u> </u>	
(PROBE FURTHER WITH:) Anything else?	
Can you offer any <u>suggestions for improving this idea</u> of a new e-Signature method and, if so, what would you do to improve it? (ENTER <u>VERBATIM</u> & PROBE.)	
what would you do to improve it? (ENTER VERBATIM & PROBE.)	
what would you do to improve it? (ENTER VERBATIM & PROBE.)	
What would you do to improve it? (ENTER VERBATIM & PROBE.)	
What would you do to improve it? (ENTER VERBATIM & PROBE.) (PROBE FURTHER WITH:) How else? Based on the description you just heard, please rate the extent to which you agree or disagree	
What would you do to improve it? (ENTER VERBATIM & PROBE.)	
What would you do to improve it? (ENTER VERBATIM & PROBE.) (PROBE FURTHER WITH:) How else? Based on the description you just heard, please rate the extent to which you agree or disagree that this e-Signature method would have each of the following characteristics. Please use the same agreement rating scale as before, that is, "Agree Completely", "Agree Mostly", "Agree Somewhat", "Disagree Somewhat", or "Disagree Completely". Let's start with this first	

Completely	<u>Mostly</u>	Somewhat		t Completely	Say	
Would be an improvement over current e-Signature methods 5 Would be easy for customers to use	4 4 4	3 3 3	2 2 2	1 1 1	у у у	34 35
Would enhance your overall e-file products5	4	3	2	1	У	37
Would work well within current software programs5	4	3	2	1	У	38
Other Key Attribute (to be provided by IRS)	4	3	2	1	У	39

10. Here is (the first) (the next) (the next) (the last) of the possible e-Signature methods that the IRS might offer. Please listen closely as I read this description, and then I'd like to get your feedback on it. (READ CONCEPT CLEARLY, SLOWLY TWICE & ASK FEEDBACK Qs.)

Let's call this concept"Homeland Se	curity Personal Identification Verification":
-------------------------------------	---

• To make it easier to use *e-file*, the IRS would use the standards and technology developed under Homeland Security Presidential Directive 12 (HSPD12) to register and authenticate Tax Professionals, EROs & Business Filers and the documents they transmit. • This would involve Tax Professionals and/or their clients using a standard, government-issued, computer-readable identity card to authorize and digitally sign an electronically filed tax return or other tax documents. • The registration process for Tax Professionals, business, and other non-Individual filers would have to meet the HSPD12 biometric standards. • Note: this would **not** be an "identity card" that would be usable for any purpose other than conducting business with the IRS.

	rom the perspective of a Software Developer, overall how <u>appealing or</u> e-Signature method I just described. Do you find it (READ CHOICES & CIRCLE ELOW.)
	Extremely Appealing
about how this me	h sketch of the idea of this e-Signature method, what are your <u>first thoughts</u> ethod might work for you as a developer of e-file software? (ALLOW TIME FOR IN ENTER VERBATIM & PROBE)
(PROBE FURTHER WIT	TH:) Anything else?
Can you offer any what would you do	suggestions for improving this idea of a new e-Signature method and, if so, to improve it? (ENTER VERBATIM & PROBE.)
(PROBE EURTHER WI)	TH:) How else?
Based on the desc that this e-Signatu same agreement re Somewhat", "Disa characteristic(ST	ription you just heard, please rate the extent to which you agree or disagree re method would have each of the following characteristics. Please use the ating scale as before, that is, "Agree Completely", "Agree Mostly", "Agree agree Somewhat", or "Disagree Completely". Let's start with this first ART AT PRE-CHECK, READ CHARACTERISTIC, CIRCLE RATING AND THEN CONTINUE UNTIL THOO HAS BEEN RATED ON ALL CHARACTERISTICS,) (NOTE: DO NOT OFFER "DON'T

Agree	Agree	Agree	Disagree	Disagree	DK/Can't	
<u>Completely</u>	Mostly	Somewhar	Somewhat	Completely	<u>Say</u>	
Would be an improvement over current e-Signature methods 5	4	3	2	1	у	41
Would be easy for customers to use	4	3	2	1	ý	42
Would be easy to explain to customers5	4	3	2	1	У	43
Would enhance your overall e-file products5	4	3	2	1	у	44
Would work well within current software programs5	4	3	2	1	У	45
Other Key Attribute (to be provided by IRS)5	4	3	2	1	у	46

15.	Here is (the first) (the next) (the last) of the possible e-Signature methods that the
	IRS might offer. Please listen closely as I read this description, and then I'd like to get your
	feedback on it. (READ CONCEPT CLEARLY, SLOWLY TWICE & ASK FEEDBACK Qs.)

Let's call this concept"Digita	al Certificates":
--------------------------------	-------------------

To make it easier to use *e-file*, the IRS would utilize industry standards for e-authentication by allowing the use of digital certificates.
 Digital certificates enable government agencies to authenticate users for access control, as well as for submission of digitally signed files or forms on the internet.
 The IRS would accept and support digital certificates from SSA, banks, or other trusted issuers.
 Note: Software Developers and the IRS would authenticate returns with digital certificates over secure servers.

	Extremely Appealing5
	Very Appealing4
	Somewhat Appealing
	Somewhat Unappealing2
	Or Very Unappealing1
	(DON'T READ, BUT CIRCLE IF) Don't Know/Refusedy
	u heard, what are your <u>first thoughts about how this method might work</u> of e-file software? (ALLOW TIME FOR REFLECTION AND THEN ENTER <u>VERBATIM</u> &
PROBE FURTHER WITH:) A	Anything else?
	gestions for improving this idea of a new e-Signature method and, if so,
	gestions for improving this idea of a new e-Signature method and, if so, mprove it? (ENTER VERBATIM & PROBE.)
hat would you do to i	

19. Based on the description you just heard, please rate the extent to which you agree or disagree that this e-Signature method would have each of the following characteristics. Please use the same agreement rating scale as before, that is, "Agree Completely", "Agree Mostly", "Agree Somewhat", "Disagree Somewhat", or "Disagree Completely". Let's start with this first characteristic...(START AT PRE-CHECK, READ CHARACTERISTIC, CIRCLE RATING AND THEN CONTINUE UNTIL THIS SIGNATURE METHOD HAS BEEN RATED ON ALL CHARACTERISTICS.) (NOTE: DO NOT OFFER "DON'T KNOW"/"CANT SAY" AS A CHOICE BUT CIRCLE IT IF RESPONDENT CANNOT RATE THE CHARACTERISTIC.)

□ Would be easy for customers to use	Agree <u>Completely</u>	Agree <u>Mostly</u>	Agree Somewha	Disagree t Somewha	Disagree Completely	DK/Can't <u>Say</u>	
□ Would enhance your overall <i>e-file</i> products	Would be easy for customers to use	4 4 4 4 4	3 3 3 3 3	2 2 2 2 2 2	1 1 1 1 1	у у у у у	48 49 50 51 52

20.	Here is (the first) (the next) (the next) (the last) of the possible e-Signature IRS might offer. Please listen closely as I read this description, and then I feedback on it. (READ CONCEPT CLEARLY, SLOWLY TWICE & ASK FEEDBACK Qs.)		
	Let's call this concept"Credit Card Authentication":		
• To	To make it easier to use e-file, the IRS would use a third party or current industry st	tandards to verify information	on
	om a credit card or debit card, along with information from a Taxpayer's return, to		
	no is signing an electronic tax return.	, , , , , , , , , , , , , , , , , , , ,	
21.	From a Software Developer's perspective, overall how appealing or unage Signature method I just described. Do you find it (READ CHOICES & CIRCLE BELOW.)		
	Extremely Appealing	5	4
	Very Appealing		
	Somewhat Appealing		
	Somewhat Unappealing		
	Or Very Unappealing		
	(DON'T READ, BUT CIRCLE IF) Don't Know/Refused.	у	
22.	And based on what you heard, what are your <u>first thoughts about how this m</u> for you as a developer of <i>e-file</i> software? (ALLOW TIME FOR REFLECTION AND THE PROBE.)	<u>nethod might work</u> N ENTER <u>VERBATIM</u> &	
	(PROBE FURTHER WITH:) Anything else?		
23.	Can you offer any <u>suggestions for improving this idea</u> of a new e-Signature what would you do to improve it? (ENTER VERBATIM & PROBE.)	method and, if so,	
	(PROBE FURTHER WITH:) How else?		
24.	Based on the description you just heard, please rate the extent to which you that this e-Signature method would have each of the following characteristic same agreement rating scale as before, that is, "Agree Completely", "Agree	s. Please use the	
	Somewhat", "Disagree Somewhat", or "Disagree Completely". Let's statement of the characteristic (START AT PRE-CHECK, READ CHARACTERISTIC, CIRCLE RATING AND THE THIS SIGNATURE METHOD HAS BEEN RATED ON ALL CHARACTERISTICS.) (NOTE: DO KNOW"/"CANT SAY" AS A CHOICE BUT CIRCLE IT IF RESPONDENT CANNOT RATE THE CHARACTERISTICS.)	Art with this first HEN CONTINUE UNTIL NOT OFFER "DON'T	
		sagree Disagree DK/Can't newhat Completely Say	
	☐ Would be an improvement over current e-Signature methods 5 4 3	2 1 v	4
		,	44 49
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			52
	· •	•	5

(DDARE EUDZU	ER WITH:) Anythi i	na alca?		
(PROBE FORTH	ER WITE:) Anytin	ng eiser		

NO DEMOGRAPHIC OR PROFILING INFORMATION NEEDED ON THE SMALL SAMPLE OF SOFTWARE DEVELOPERS.

GO TO CLOSURE OF SURVEY.

CLOSING COMMENTS

That completes the survey. We are required by law to report to you the OMB (Office Of Management and Budget) Control Number for this public information request. That number is 1545-1432. In addition, if you have any comments about the time estimate to complete the survey or ways to improve the survey, you may write to the IRS. Would you like the address? (IF YES, ADDRESS IS...) IRS Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224.

OMB # TBD RUSSELL RESEARCH, INC 1775 BROADWAY, STE 630 NY, NY 10019-1903

2006 e-Signature Customer Satisfaction Survey Preparer/ERO Cell

RMR #T8D Summer 2006 PAGE 1 (C1)

RESPONDEN	NT ID#						(1-5)	
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	Area #55	Area #66	Area #7	. 7				
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AFTER REACHING POTENTIAL RESPONDENT, INTRODUCE YOURSELF WITH:

Hello, I am______of Russell Research in New York, an independent national survey research firm. The Internal Revenue Service has asked us to contact a sample of Tax Professionals who file client Federal Income Tax Returns electronically, and to get your opinions about electronic filing – specifically about the electronic signature options currently available. Your participation in this survey is entirely voluntary and your responses to questions will be kept in the strictest confidence by Russell Research. The survey should take about 10-12 minutes to complete and we'd appreciate your participation. Would you be willing to participate in the survey?

- >> IF "YES", CONTINUE.
- >> IF "NO", THANK & RECORD AS "Ref" ON LINE FOR THIS ATTEMPT IN BOX ABOVE.

IF "YES", CONTINUE WITH THE REMAINDER OF THE QUESTIONNAIRE, WHICH CONTINUES ON THE NEXT PAGE.

ı.	method of signature that we'd like to talk to you about too where you apply a PIN number to serve as the Taxpayer's or fax the paper signature form. Overall, how satisfied are signature for your clients' Federal Income Tax Returns? A	lay is t ignatu you v	the Prac re, remo vith this	titioner ving the method	PIN meth need to l of elect	mail tronic	
	ONE ANSWER BELOW.) Completely Satisfied					5	
	Mostly Satisfied						
	Somewhat Satisfied						
	Somewhat Dissatisfied						
	Or Very Dissatisfied						
	(DON'T READ, BUT CIRCLE IF) DO						
2.	What, if anything, do you <u>like</u> about this method of electron Return? (ENTER VERBATIM & PROBE.)	ically	signing	a Federa	al Incom	e Tax	
	(PROBE FURTHER WITH:) Anything else?						
3.	In your opinion, can this method of electronic signing o improved in any way? (CIRCLE ANSWER BELOW.)	fa Fe	deral In	come T	ax Retur	rn be	
						4	
	Yes (ASK Q4 NEXT)				***********	2	
1.	No (SKIP TO Q5 NEXT)	used (S	KIP TO Q	5 NEXT)	***************************************	2	
1.	No (SKIP TO Q5 NEXT)(DON'T READ) Don't Know/Refu	used (S	KIP TO Q	5 NEXT)	ROBE.)	2 y	
1 .	(IF "YES" TO Q3, ASK) In what specific ways can it be improved (PROBE FURTHER WITH:) How else? (ASK ALL:) Please rate the extent to which you agree or destatements about this method of signing a Federal Incompating scale of "Agree Completely", "Agree Mostly" Somewhat", or "Disagree Completely". Let's start CHARACTERISTIC, CIRCLE RATING AND THEN CONTINUE UNTIL THIS SALL CHARACTERISTICS,) (NOTE: DO NOT OFFER "DON'T KNOW"/"CARESPONDENT CANNOT RATE THE CHARACTERISTIC.)	isagrene Tax , "Ag with NT SAY	e with e Return ree So (START RE METH	each of Here, mewhat AT PRE OD HAS E	the follo please u ", "Disa -CHECK, BEEN RATE JT CIRCLE	owing use a agree READ ED ON	
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	(IF "YES" TO Q3, ASK) In what specific ways can it be improved (PROBE FURTHER WITH:) How else? (ASK ALL:) Please rate the extent to which you agree or d statements about this method of signing a Federal Incompating scale of "Agree Completely", "Agree Mostly" Somewhat", or "Disagree Completely". Let's start CHARACTERISTIC, CIRCLE RATING AND THEN CONTINUE UNTIL THIS SALL CHARACTERISTICS,) (NOTE: DO NOT OFFER "DON'T KNOW"/"CARESPONDENT CANNOT RATE THE CHARACTERISTIC.) Agree Completely	isagree isagree isagree	e with e Return ree So (START RE METH " AS A C	each of Here, mewhat AT PRE OD HAS E HOICE BU	the folloplease unit of the control	ewing use a agree READ ED ON IT IF	
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5.	(IF "YES" TO Q3, ASK) In what specific ways can it be improved (PROBE FURTHER WITH:) How else? (ASK ALL:) Please rate the extent to which you agree or distatements about this method of signing a Federal Incompating scale of "Agree Completely", "Agree Mostly" Somewhat", or "Disagree Completely". Let's start CHARACTERISTIC, CIRCLE RATING AND THEN CONTINUE UNTIL THIS SALL CHARACTERISTICS.) (NOTE: DO NOT OFFER "DON'T KNOW"/"CA RESPONDENT CANNOT RATE THE CHARACTERISTIC.) Agree Completely Is better than other methods of signing a Federal Tax Return 5 Assures that a Federal Tax Return is processed quickly 5	isagrene Tax , "Agree Mostly 4	e with e Return. ree So (START RE METH AS A C Agree Sornewhat	each of Here, mewhat AT PRE OD HAS E HOICE BU Disagree Somewhat	the folio please L ", "Disa -CHECK, BEEN RATE JT CIRCLE Disagree Completely	wing use a agree READ ED ON E IT IF DK/Can't Say y	
5.	(IF "YES" TO Q3, ASK) In what specific ways can it be improved (PROBE FURTHER WITH:) How else? (ASK ALL:) Please rate the extent to which you agree or destatements about this method of signing a Federal Incomparing scale of "Agree Completely", "Agree Mostly" Somewhat", or "Disagree Completely". Let's start CHARACTERISTIC, CIRCLE RATING AND THEN CONTINUE UNTIL THIS SALL, CHARACTERISTICS,) (NOTE: DO NOT OFFER "DON'T KNOW"/"CARESPONDENT CANNOT RATE THE CHARACTERISTIC.) Agree Completely Is better than other methods of signing a Federal Tax Return	isagrene Tax , "Ag with IIGNATUNT SAY Agree Mostiy 4	e with e Return. ree So. (START " AS A C Agree Sornewhat 3 3	each of Here, mewhat AT PRE OD HAS E HOICE BU Disagree Somewhat 2	the folioplease Law, "Disa-CHECK, BEEN RATE Disagree Completely 1	wing use a agree READ ED ON E IT IF DK/Can't Say y y y	
5. 	(IF "YES" TO Q3, ASK) In what specific ways can it be improved (PROBE FURTHER WITH:) How else? (ASK ALL:) Please rate the extent to which you agree or destatements about this method of signing a Federal Incomparing scale of "Agree Completely", "Agree Mostly" Somewhat", or "Disagree Completely". Let's start CHARACTERISTIC, CIRCLE RATING AND THEN CONTINUE UNTIL THIS SALL CHARACTERISTICS,) (NOTE: DO NOT OFFER "DON'T KNOW"/"CARESPONDENT CANNOT RATE THE CHARACTERISTIC.) Agree Completely Is better than other methods of signing a Federal Tax Return 5 Assures that a Federal Tax Return is processed quickly	isagree Mostly Agree Mostly 4 4 4	e with a Return. Return. REMETH AS A C Agree Sornewhat 3 3 3 3 3	each of Here, mewhat AT PRE OD HAS E HOICE BU Disagree Somewhat 2 2 2 2	the folloplease umage of the completely the complet	wing use a agree READ ED ON E IT IF DK/Can't Say y y y y	
5. 0	(IF "YES" TO Q3, ASK) In what specific ways can it be improved (PROBE FURTHER WITH:) How else? (ASK ALL:) Please rate the extent to which you agree or distatements about this method of signing a Federal Incomparing scale of "Agree Completely", "Agree Mostly" Somewhat", or "Disagree Completely". Let's start CHARACTERISTIC, CIRCLE RATING AND THEN CONTINUE UNTIL THIS SALL CHARACTERISTICS,) (NOTE: DO NOT OFFER "DON'T KNOW"/"CA RESPONDENT CANNOT RATE THE CHARACTERISTIC.) Agree Completely Is better than other methods of signing a Federal Tax Return	isagree ne Tax , "Agree Mostly 4 4 4	e with e Return. ree So. (START " AS A C Agree Sornewhat 3 3 3 3 3 3	each of Here, mewhat AT PRE OD HAS E HOICE BUDisagree Somewhat 2 2 2 2 2 2 2	the folio please u.", "Disa-CHECK, BEEN RATE JT CIRCLE Completely 1 1 1 1 1 1 1 1	wing see a agree READ ED ON E IT IF DK/Can't Say y y y y y	
5.	No (SKIP TO Q5 NEXT)	isagrene Tax , "Ag with IIGNATU NT SAY Agree Mostiy 4 4 4 4	e with a Return. Return. REMETH AS A C Agree Sornewhat 3 3 3 3 3	each of Here, mewhat AT PRE OD HAS E HOICE BU Disagree Somewhat 2 2 2 2	the folio please L. ", "Disa-CHECK, BEEN RATE JT CIRCLE Disagree Completely 1 1 1 1	wing use a agree READ ED ON E IT IF DK/Can't Say y y y y	

PRODUCTION: ROTATE NEXT 4 PAGES TO ASSURE EQUAL # OF 1ST POSITION EVALUATIONS OF THE 4 E-SIGNATURE CONCEPTS.

INTERVIEWER: READ THIS INTRO TO THE CONCEPT EVALUATIONS: I'd like to describe some other possible ways to electronically sign a Federal Income Tax Return. THEN CONTINUE TO NEXT PAGE.

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6.	Here is (the first) (the next) (the next) (the last) of the posederal income Tax Return. Please listen closely as I read get your feedback on it. (READ CONCEPT CLEARLY, SLOWLY TWO	l this d	escription	on, and t			
	Let's call this concept"An Improve	d PIN	System ^e	" :			
• To	make it easier to use <i>e-file</i> , the IRS would improve and expan	nd the	IRS Pers	onal Ide	ntificatio	n Number	(PIN)
svste	em to let Taxpayers register and obtain a PIN that IRS would use	e to val	idate thei	ir identity	/. ● This	PIN regist	ration
1 -	d also be available while using a web-based or personal compute			-		3	
7.	How appealing or unappealing is the electronic signature find it (READ CHOICES & CIRCLE JUST ONE ANSWER BELOW.)	e meth	od I jus	t descri	bed. De	o you	
	Extremely Appealing					5	3
	Very Appealing						
	Somewhat Appealing						
	Somewhat Unappealing						
	Or Very Unappealing						
	(DON'T READ, BUT CIRCLE IF) D	on't Kn	ow/Refus	sed	•	y	
8.	What, if anything, do you think you would <u>like</u> about this Federal Income Tax Return? (ENTER <u>VERBATIM</u> & PROBE.)	meth	od of ele	ectronica	ally sign	ing a	
	(PROBE FURTHER WITH:) Anything else?						
9.	In your opinion, can this method of electronic signing of improved in any way? (CIRCLE ANSWER BELOW.)	of a Fe	ederal In	come T	ax Retu	rn be	
	Yes (ASK Q10 NEXT)					1	34
	No (SKIP TO Q11 NEXT)						52
	(DON'T READ) Don't Know/Ref						
10.	(IF "YES" TO Q9, ASK) In what specific ways can it be improve					······,	
	(PROBE FURTHER WITH:) How else?					_ _	
11.	(ASK ALL:) Based on the description you just heard, please redisagree that this method of electronically signing a Federach of the following characteristics. Please use the same that is, "Agree Completely", "Agree Mostly", "Agree Sor "Disagree Completely". Let's start with this first characteristic, circle rating and then continue until this sall characteristics,) (NOTE: DO NOT OFFER "DON'T KNOW"/"CARESPONDENT CANNOT RATE THE CHARACTERISTIC.)	eral Inc e agre newha cteristi	come Ta ement ra t", "Disa c(STAR URE METH	x Returnating sca agree So at AT PRI OD HAS E	n would ale as be omewhan E-CHECK, BEEN RAT	have efore, t", or READ ED ON	
	Agree <u>Completely</u>	Agree Mostly	Agree <u>Somewhat</u>	Disagree Somewhat		DK/Can't <u>Say</u>	
	is better than other methods of signing a Federal Tax Return 5	4	3	2	1	у	35
	Assures that a Federal Tax Return is processed quickly 5	4	3	2	1	ý	36
	Is easy to use, with no hassle5	4	3	2	1	ý	37
	Is easy to explain to clients (replaces "private/secure" in Txpr Survey) 5	4	3	2	1	у	38
	Saves you time in filing clients' Federal Tax Returns	4	3	2	1	у	39

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☐ Makes the whole Federal Tax Return filing process easier.......... 5

12. Here is (the first) (the next) (the last) of the possible ways to electronically sign a Federal Income Tax Return. Please listen closely as I read this description, and then I'd like to get your feedback on it. (READ CONCEPT CLEARLY, SLOWLY TWICE & ASK FEEDBACK Qs.)

Let's call this concept	"Homeland Security	Porconal Ident	ification Verification	w.
Let's can this concept	. nomeiano securio	/ Personai Ident	incation verification	

• To make it easier to use *e-file*, the IRS would use the standards and technology developed under Homeland Security Presidential Directive 12 (HSPD12) to register and authenticate Tax Professionals, EROs & Business Filers and the documents they transmit. • This would involve Tax Professionals and/or their clients using a standard, government-issued, computer-readable identity card to authorize and digitally sign an electronically filed tax return or other tax documents. • The registration process for Tax Professionals, business, and other non-Individual filers would have to meet the HSPD12 biometric standards. • Note: this would **not** be an "identity card" that would be usable for any purpose other than conducting business with the IRS.

How <u>appealing</u> or <u>unappealing</u> is the electronic signature method I just described. Do you find it (READ CHOICES & CIRCLE JUST ONE ANSWER BELOW.)
Extremely Appealing 5 Very Appealing 4 Somewhat Appealing 3 Somewhat Unappealing 2 Or Very Unappealing 1 (DON'T READ, BUT CIRCLE IF) Don't Know/Refused y
What, if anything, do you think you would <u>like</u> about this method of electronically signing a Federal Income Tax Return? (ENTER <u>VERBATIM</u> & PROBE.)
(PROBE FURTHER WITH:) Anything else?
In your opinion, can this method of electronic signing of a Federal Income Tax Return be improved in any way? (CIRCLE ANSWER BELOW.)
Yes (ASK Q16 NEXT)
No (SKIP TO Q17 NEXT)
(IF "YES" TO Q15, ASK) In what <u>specific ways</u> can it be improved? (ENTER <u>VERBATIM</u> & PROBE.)
(PROBE FURTHER WITH:) How else?
(ASK ALL:) Based on the description you just heard, please rate the extent to which you agree or
(ASK ALL:) Based on the description you just heard, please rate the extent to which you agree or disagree that this method of electronically signing a Federal Income Tax Return would have each of the following characteristics. Please use the same agreement rating scale as before,
(ASK ALL:) Based on the description you just heard, please rate the extent to which you agree or disagree that this method of electronically signing a Federal Income Tax Return would have each of the following characteristics. Please use the same agreement rating scale as before, that is, "Agree Completely", "Agree Mostly", "Agree Somewhat", "Disagree Somewhat", or "Disagree Completely". Let's start with this first characteristic(START AT PRE-CHECK, READ CHARACTERISTIC, CIRCLE RATING AND THEN CONTINUE UNTIL THIS SIGNATURE METHOD HAS BEEN RATED ON ALL CHARACTERISTICS,) (NOTE: DO NOT OFFER "DON'T KNOW"/"CANT SAY" AS A CHOICE BUT CIRCLE IT IF
(ASK ALL:) Based on the description you just heard, please rate the extent to which you agree or disagree that this method of electronically signing a Federal Income Tax Return would have each of the following characteristics. Please use the same agreement rating scale as before, that is, "Agree Completely", "Agree Mostly", "Agree Somewhat", "Disagree Somewhat", or "Disagree Completely". Let's start with this first characteristic(START AT PRE-CHECK, READ CHARACTERISTIC, CIRCLE RATING AND THEN CONTINUE UNTIL THIS SIGNATURE METHOD HAS BEEN RATED ON ALL CHARACTERISTICS.) (NOTE: DO NOT OFFER "DON'T KNOW"/"CANT SAY" AS A CHOICE BUT CIRCLE IT IF RESPONDENT CANNOT RATE THE CHARACTERISTIC.)
(ASK ALL:) Based on the description you just heard, please rate the extent to which you agree or disagree that this method of electronically signing a Federal Income Tax Return would have each of the following characteristics. Please use the same agreement rating scale as before, that is, "Agree Completely", "Agree Mostly", "Agree Somewhat", "Disagree Somewhat", or "Disagree Completely". Let's start with this first characteristic(START AT PRE-CHECK, READ CHARACTERISTIC, CIRCLE RATING AND THEN CONTINUE UNTIL THIS SIGNATURE METHOD HAS BEEN RATED ON ALL CHARACTERISTICS.) (NOTE: DO NOT OFFER "DON'T KNOW"/"CANT SAY" AS A CHOICE BUT CIRCLE IT IF RESPONDENT CANNOT RATE THE CHARACTERISTIC.)
(ASK ALL:) Based on the description you just heard, please rate the extent to which you agree or disagree that this method of electronically signing a Federal Income Tax Return would have each of the following characteristics. Please use the same agreement rating scale as before, that is, "Agree Completely", "Agree Mostly", "Agree Somewhat", "Disagree Somewhat", or "Disagree Completely". Let's start with this first characteristic(START AT PRE-CHECK, READ CHARACTERISTIC, CIRCLE RATING AND THEN CONTINUE UNTIL THIS SIGNATURE METHOD HAS BEEN RATED ON ALL CHARACTERISTICS.) (NOTE: DO NOT OFFER "DON'T KNOW"/"CANT SAY" AS A CHOICE BUT CIRCLE IT IF RESPONDENT CANNOT RATE THE CHARACTERISTIC.) Agree Agree Agree Disagree Disagree Disagree Disagree Disagree Disagree Disagree Disagree Completely Say Is better than other methods of signing a Federal Tax Return 5 4 3 2 1 y
(ASK ALL:) Based on the description you just heard, please rate the extent to which you agree or disagree that this method of electronically signing a Federal Income Tax Return would have each of the following characteristics. Please use the same agreement rating scale as before, that is, "Agree Completely", "Agree Mostly", "Agree Somewhat", "Disagree Somewhat", or "Disagree Completely". Let's start with this first characteristic(START AT PRE-CHECK, READ CHARACTERISTIC, CIRCLE RATING AND THEN CONTINUE UNTIL THIS SIGNATURE METHOD HAS BEEN RATED ON ALL CHARACTERISTICS.) (NOTE: DO NOT OFFER "DON'T KNOW"/"CANT SAY" AS A CHOICE BUT CIRCLE IT IF RESPONDENT CANNOT RATE THE CHARACTERISTIC.) Agree Agree Agree Disagree Disagree Disagree Disagree Disagree Disagree Disagree Disagree Disagree Completely Mostly Somewhat Completely Say

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Saves you time in filing clients' Federal Tax Returns 5

☐ Makes the whole Federal Tax Return filing process easier........... 5

☐ Shows the IRS cares about making tax filing easier...... 5

18.	Here is (the first) (the next) (the next) (the last) of the Federal Income Tax Return. Please listen closely as I reget your feedback on it. (READ CONCEPT CLEARLY, SLOWLY)	ad this d	escription	, and the			
	Let's call this concept"Digita	l Certific	ates":				
• To	make it easier to use e-file, the IRS would utilize industry st	andards f	or e-authe	ntication	by alloy	vina the ı	use of
ı	al certificates. • Digital certificates enable government agence						
_							
as fo	or submission of digitally signed files or forms on the inter	net. • T	he IR\$ wo	ould acce	pt and	support	digital
certif	ficates from SSA, banks, or other trusted issuers. • Note: So	ftware De	evelopers a	and the I	RS wou	ld authen	ticate
	ns with digital certificates over secure servers.						
19.	How appealing or unappealing is the electronic signate find it (READ CHOICES & CIRCLE JUST ONE ANSWER BELOW.)	ure meth	od I just	describe	 ed. Do	you	
	Extremely Appealing					5	51
	Very Appealing						
	Somewhat Appealing						
	Somewhat Unappealing						
	Or Very Unappealing						
	(DON'T READ, BUT CIRCLE IF'						
20.	What, if anything, do you think you would <u>like</u> about t Federal Income Tax Return? (ENTER <u>VERBATIM</u> & PROBE.)	his meth	od of elec	tronical	ly signi	ng a	
21.	(PROBE FURTHER WITH:) Anything else? In your opinion, can this method of electronic signing			_			
	improved in any way? (CIRCLE ANSWER BELOW.)						
	Yes (ASK Q22 NEXT)						52
	No (SKIP TO Q23 NEXT)						
	(DON'T READ) Don't Know/f	Refused (SKIP TO Q23	NEXT)		у	
22 .	(IF "YES" TO Q21, ASK) In what specific ways can it be impr	oved? (E	NTER <u>VERB</u>	ATIM & PR	OBE.)		
	(PROBE FURTHER WITH:) How else?						
23.	(ASK ALL:) Based on the description you just heard, please disagree that this method of electronically signing a Feeach of the following characteristics. Please use the set that is, "Agree Completely", "Agree Mostly", "Agree Susagree Completely". Let's start with this first characteristic, circle rating and then continue until the ALL CHARACTERISTICS,) (NOTE: DO NOT OFFER "DON'T KNOW".	ederai Indame agre Somewhat Tracterist IS SIGNATI	come Tax ement rat it", "Disaç ic(START JRE METHO	Return ing scal gree Son AT PRE- D HAS BE	would I e as be newhat' CHECK, I EN RATE	have fore, ", or READ D ON	
	RESPONDENT CANNOT RATE THE CHARACTERISTIC.) Agree Complex		Agree Somewhat 9	Disagree [DK/Can't Say	
_						_ _	
	Is better than other methods of signing a Federal Tax Return 5	4	3	2	1	У	53
	Assures that a Federal Tax Return is processed quickly	4	3	2	1	У	54
	Is easy to use, with no hassle	4 4	3 3	2 2	‡ 1	У	55
	Is easy to explain to clients (replaces "private/secure" in Txpr Survey) 5 Saves you time in fiting clients' Federal Tax Returns 5	4	3 3	2	1	y	56 57
ä	Makes the whole Federal Tax Return filing process easier	4	3	2	1	y Y	58
_	The man and the state of the st	-	-	_		,	

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☐ Shows the IRS cares about making tax filing easier...... 5

24.	Here is (the first) (the next) (the last) of the possible ways to electronically sign a Federal Income Tax Return. Please listen closely as I read this description, and then I'd like to get your feedback on it. (READ CONCEPT CLEARLY, SLOWLY TWICE & ASK FEEDBACK Qs.)
	Let's call this concept"Credit Card Authentication":

who is signing an electronic tax return.	
from a credit card or debit card, along with information from a Taxpayer's return, to positiv	ely identify a Taxpayer
 To make it easier to use e-file, the IRS would use a third party or current industry standard 	ds to verify information

better than other methods of signing a Federal Tax Return 5 4 3 2 1 y sures that a Federal Tax Return is processed quickly 5 4 3 2 1 y easy to use, with no hassle		w <u>appealing or unappealing</u> is the electronic signatured it (READ CHOICES & CIRCLE JUST ONE ANSWER BELOW.)	re meth	od I jus	t descri	ibed. Do	you
Very Appealing		Extremely Appealing	<i>.</i>		. .		5
Somewhat Unappealing							
Or Very Unappealing							
(DON'T READ, BUT CIRCLE IF) Don't Know/Refused		Somewhat Unappealing					2
that, if anything, do you think you would like about this method of electronically signing a sederal Income Tax Return? (ENTER VERBATIM & PROBE.) PROBE FURTHER WITH.) Anything else? your opinion, can this method of electronic signing of a Federal Income Tax Return be aproved in any way? (CIRCLE ANSWER BELOW.) Yes (ASK Q22 NEXT)							
your opinion, can this method of electronic signing of a Federal Income Tax Return be aproved in any way? (CIRCLE ANSWER BELOW.) Yes (ASK Q22 NEXT)		(DON'T READ, BUT CIRCLE IF)	Don't Kne	ow/Refus	ed	••••••	у
your opinion, can this method of electronic signing of a Federal Income Tax Return be aproved in any way? (CIRCLE ANSWER BELOW.) Yes (ASK Q22 NEXT)	e	nat, if anything, do you think you would <u>like</u> about thi deral Income Tax Return? (ENTER VERBATIM & PROBE.)	s metho	od of ele	ectronic	ally sign	ing a
Yes (ASK Q22 NEXT)	,	ROBE FURTHER WITH:) Anything else?					
SK ALL:) Based on the description you just heard, please rate the extent to which you agree or sagree that this method of electronically signing a Federal Income Tax Return would have such of the following characteristics. Please use the same agreement rating scale as before at is, "Agree Completely", "Agree Mostly", "Agree Somewhat", "Disagree Somewhat", or Disagree Completely". Let's start with this first characteristic(START AT PRE-CHECK, READ LARACTERISTIC, CIRCLE RATING AND THEN CONTINUE UNTIL THIS SIGNATURE METHOD HAS BEEN RATED ON L. CHARACTERISTICS,) (NOTE: DO NOT OFFER "DON'T KNOW"/"CANT SAY" AS A CHOICE BUT CIRCLE IT IF SPONDENT CANNOT RATE THE CHARACTERISTIC.) Agree Completely Agree Agree Disagree Disagree Disagree Completely Mostly Somewhat Completely Say Determined that a Federal Tax Return is processed quickly							
sagree that this method of electronically signing a Federal Income Tax Return would have school the following characteristics. Please use the same agreement rating scale as before at is, "Agree Completely", "Agree Mostly", "Agree Somewhat", "Disagree Somewhat", or Disagree Completely". Let's start with this first characteristic(START AT PRE-CHECK, READ HARACTERISTIC, CIRCLE RATING AND THEN CONTINUE UNTIL THIS SIGNATURE METHOD HAS BEEN RATED ON L. CHARACTERISTICS,) (NOTE: DO NOT OFFER "DON'T KNOW"/"CANT SAY" AS A CHOICE BUT CIRCLE IT IN SIGNATURE METHOD HAS BEEN RATED ON L. CHARACTERISTICS,) (NOTE: DO NOT OFFER "DON'T KNOW"/"CANT SAY" AS A CHOICE BUT CIRCLE IT IN SIGNATURE METHOD HAS BEEN RATED ON L. CHARACTERISTICS.) Agree	F	(DON'T READ) Don't Know/Re	fused (S	KIP TO Q	23 NEXT) .		
ch of the following characteristics. Please use the same agreement rating scale as before at is, "Agree Completely", "Agree Mostly", "Agree Somewhat", "Disagree Somewhat", or Disagree Completely". Let's start with this first characteristic(START AT PRE-CHECK, READ HARACTERISTIC, CIRCLE RATING AND THEN CONTINUE UNTIL THIS SIGNATURE METHOD HAS BEEN RATED ON L CHARACTERISTICS,) (NOTE: DO NOT OFFER "DON'T KNOW"/"CANT SAY" AS A CHOICE BUT CIRCLE IT IS SPONDENT CANNOT RATE THE CHARACTERISTIC.) Agree Agree Agree Disagree Disag		(DON'T READ) Don't Know/Re	efused (S	KIP TO Q	23 NEXT) . BATIM & F	PROBE.)	у
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better than other methods of signing a Federal Tax Return 5 4 3 2 1 y sures that a Federal Tax Return is processed quickly 5 4 3 2 1 y easy to use, with no hassle	(PI	(DON'T READ) Don't Know/Re EYES" TO Q21, ASK) In what specific ways can it be improve BOBE FURTHER WITH:) How else? K ALL:) Based on the description you just heard, please agree that this method of electronically signing a Fed	efused (S	extent to	o which	PROBE.) 1 You agr	ree or
sures that a Federal Tax Return is processed quickly	(AS dis ea tha CH.	(DON'T READ) Don't Know/Reaves and it be improved to Q21, ASK) In what specific ways can it be improved to Q21, ASK) In what specific ways can it be improved to Q21, ASK) How else? KALL:) Based on the description you just heard, please agree that this method of electronically signing a Federh of the following characteristics. Please use the sand is, "Agree Completely", "Agree Mostly", "Agree So sagree Completely". Let's start with this first characteristic, CIRCLE BATING AND THEN CONTINUE UNTIL THIS CHARACTERISTICS,) (NOTE: DO NOT OFFER "DON'T KNOW"/"C	rate the leral income agreementation	extent to come Talement rate(STAR	o which x Return ting sc gree Sc T AT PR OD HAS E	You agr n would ale as be omewhat E-CHECK, BEEN RAT	ee or have efore, READ ED ON
sures that a Federal Tax Return is processed quickly	(PI	(DON'T READ) Don't Know/Recression Don't Cannot Rate the Characteristics.	rate the leral Income agreemewhat SIGNATU ANT SAY	extent to come Talement rate. (STAR) "AS A C	o which x Return ting scr gree Scr T AT PRI OD HAS BE HOICE BE	PROBE.) You agr n would ale as be omewhat E-CHECK, BEEN RATI	ee or have efore, READ ED ON
easy to explain to clients (replaces "private/secure" in Txpr Survey) 5 4 3 2 1 y lives you time in filling clients' Federal Tax Returns 5 4 3 2 1 y	(PI	(DON'T READ) Don't Know/Recressing to Q21, ASK) In what specific ways can it be improved agree that this method of electronically signing a Federal State of the following characteristics. Please use the sand is, "Agree Completely", "Agree Mostly", "Agree So sagree Completely". Let's start with this first characteristic, CIRCLE BATING AND THEN CONTINUE UNTIL THIS CHARACTERISTICS,) (NOTE: DO NOT OFFER "DON'T KNOW"/"CEPONDENT CANNOT RATE THE CHARACTERISTIC.) Agree Completely	rate the leral Income agree SIGNATU ANT SAY	extent to come Talement rate. (STARIUS AS A Come Manual Come Manua	o which x Return ting sca gree Sca T AT PRI OD HAS BE HOICE BE Disagree Somewhat	PROBE.) You agr n would ale as be omewhat E-CHECK, BEEN RATI	ree or have efore, t", or READ ED ON EIT IF
ves you time in filing clients' Federal Tax Returns	(PI AS has has been seen as the seen as th	(DON'T READ) Don't Know/Recressive to Q21, ASK) In what specific ways can it be improved as the complete specific ways can it be	rate the leral Income agreemewhat SIGNATU ANT SAY	extent to come Talement rate. (STAR METH) " AS A Comewhall and a 3 3	o which x Return ting sca gree Sca T AT PRI OD HAS BE HOICE BE Disagree Somewhat	PROBE.) Tyou agr n would ale as be omewhat E-CHECK, BEEN RAT UT CIRCLE Disagree Completely	ree or have efore, t'', or READ ED ON E IT IF
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ikes the whole Federal Lax Meturn filing process easier 5 4 3 2 1 v	(PI AS	(DON'T READ) Don't Know/Recressive to Q21, ASK) In what specific ways can it be improved an it be improved to Q21, ASK) In what specific ways can it be improved to Q21, ASK) In what specific ways can it be improved to Q21, ASK) How else? [ROBE FURTHER WITH:) How else? [KALL:] Based on the description you just heard, please is agree that this method of electronically signing a Federal Tax fleat with this first characteristics. Please use the san tax flower and tax flower and tax flower	rate the leral Income agreemewhat SIGNATU ANT SAY Agree Mostly 4 4 4 4	extent to come Talement rate. (STAP) ITER WERE C(STAP) IRE METH " AS A C Agree Somewhat 3 3 3 3 3	o which x Return ting sc gree Sc T AT PR OD HAS E HOICE BE Disagree Somewhat 2 2 2 2 2	PROBE.) PROBE.) PROBE.) Problem of the company o	ree or have efore, t", or READ ED ON EIT IF DK/Can Say y
ows the IRS cares about making tax filing easier	(PI AS His Hall S AS A	CON'T READ) Don't Know/Restress to Q21, ASK) In what specific ways can it be improved an it be improved as the control of the following characteristics. Please use the same tas, "Agree Completely", "Agree Mostly", "Agree Sosagree Completely". Let's start with this first characteristic, CIRCLE RATING AND THEN CONTINUE UNTIL THIS CHARACTERISTICS,) (NOTE: DO NOT OFFER "DON'T KNOW"/"CEPONDENT CANNOT RATE THE CHARACTERISTIC.) Agree Completely etter than other methods of signing a Federal Tax Return	rate the leral income agree Mostly Agree Mostly 4 4 4 4 4 4	extent to come Talement rate. (STAP) "Agree Somewhat "A	o which x Return ting sc gree So T AT PR OD HAS B HOICE BE Disagree Somewhat 2 2 2 2 2 2	PROBE.) PROBE.) PROBE.) Problem of the company o	ee or have efore, t", or READ ED ON EIT IF DK/Car Say y y y

١.	These last few questions are for classification purposes only. Like all of your previous	PAGE 7
	responses, these too will be held in the strictest of confidence. First, what is your gender? (READ CHOICES & CIRCLE ONE ANSWER BELOW.)	
	Male 1	60
	Female	00
	Refused & Cannot Tell By Voice	
	Which of the following best describes your age? (CIRCLE ANSWER BELOW.)	
	18-25 1	61
	26-35	01
	36-45	
	46-55	
	56-64	
	65 Or Over	
	(DON'T READ BUT CIRCLE IF:) Refused	
	Which of the following best describes the <u>type of firm</u> , if any, that you work in? (READ CHOICES & CIRCLE ONE ANSWER BELOW.)	
	* H&R Block1	62
	* Jackson-Hewitt	
	* Some Other Major National or Regional Chain Of Tax Preparation Firms3	
	* Do Not Work In A Chain Of Firms - Work In A Single-Office Tax Preparation Firm Locally4	
	Do Not Work In A Firm At All – Am An Independent Tax Preparer5	
	* Do Not Work In A Tax Preparation Firm – Work In A Firm With A Different Focus6	
	(IF WORK IN ANY ASTERISKED FIRM ABOVE, ASK:) In total, including yourself, how many active tax preparers are there working in your firm? (ENTER # BELOW.)	
	TOTAL # PREPARERS WORKING IN FIRM	63-65
	Approximately how many total quarterly or annual Business and Individual Tax Returns did you personally prepare last tax season? Please give me as close to the exact number as	
	possible. (ENTER TOTAL # RETURNS BELOW.)	
	TOTAL RETURNS PREPARED LAST TAX SEASON	66-68
	Of the (READ BACK "TOTAL RETURNS" # FROM ABOVE) total quarterly and annual tax returns that you personally prepared last tax season, about what percentage would you say were quarterly or annual Business Returns and what percentage were Individual Returns? Please be as specific as possible. (ENTER N. EOR FACH TYPE RELIGIE)	
	as possible. (ENTER % FOR EACH TYPE BELOW.)	
	TOTAL MUST = 100% % OF TOTAL RETURNS THAT WERE BUSINESS RETURNS % % OF TOTAL RETURNS THAT WERE INDIVIDUAL RETURNS %	69-71 72-74
	(IF % FOR BUSINESS RETURNS ABOVE WAS 1% OR HIGHER, ASK:) Of all the total <u>quarterly or annual</u> BUSINESS tax returns that you personally prepared last tax season, about <u>what percentage</u> would you say were filed electronically or "e-filed" and involved the use of a PIN number? Again, please be as specific as possible. (ENTER % FOR EACH TYPE BELOW.)	
	% OF BUSINESS RETURNS THAT WERE e-filed AND USED PIN #%	75-77
	(IF % FOR INDIVIDUAL RETURNS ABOVE WAS 1% OR HIGHER, ASK:) Of all the total INDIVIDUAL tax returns	
	that you personally prepared last tax season, about what percentage would you say were filed electronically or "e-filed" and involved the use of a PIN number? Again, please be as specific as possible. (ENTER % FOR EACH TYPE BELOW.)	
		70.00
	% OF <i>Individual</i> . Returns that were <i>e-filed</i> and used PIN #	78-80

CLOSING COMMENTS

That completes the survey. We are required by law to report to you the OMB (Office Of Management and Budget) Control Number for this public information request. That number is 1545-1432. In addition, if you have any comments about the time estimate to complete the survey or ways to improve the survey, you may write to the IRS. Would you like the address? (IF YES, ADDRESS IS...) IRS Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224.