

IN DATABASE: DO NOT ASK

CONTACT NAME	CONTACT TELEPHONE
CONTACT ADDRESS	CONTACT E-MAIL ADDRESS
ORGANIZATION	LOGIN/PASSWORD

SCREENER INTRODUCTION

Hello, my name is [CALLER NAME] calling from Macro International on behalf of the Internal Revenue Service, or IRS.

S1. May I speak to [INSERT NAME]?

- 01 Yes, respondent answers
- 02 No such person Thank and terminate call
- 03 Respondent not available/Not a good time Set time to call back

S2. Macro International is an independent research firm working for the IRS to conduct a survey of tax professionals who prepare individual returns and assist individual taxpayers. First, are you a tax professional who prepared 25 or more returns in Tax Year 2006?

- 01 Yes Skip to S4
- 02 No Continue.

S3. How many returns would you say you prepared in Tax Year 2006?

(Record response)

S4. The overall goal of the research is to help the IRS provide better service to you as an individual tax professional. You may recall receiving a survey in the mail asking for your help in providing feedback to the IRS. We are now following up by telephone to give everyone a chance to respond. Would you be willing to participate in this survey? It will take about 20 minutes to complete.

- 01 Yes Skip to INTRODUCTION
- 02 Soft refusal Schedule new date and time—ensure correct time zone
- 03 Hard refusal Thank you and terminate call

[INTERVIEWER: Do not volunteer the web survey as an option. If the respondent requests taking the web survey, you may provide them login/password and terminate call.]

I. Introduction

Thank you. Please, feel free to be open and frank with us. Your identity and individual responses will be held confidential by Macro International, and any data provided to the IRS will be completely anonymous. Your feedback will be provided to the IRS in aggregate only with all

personally identifying information removed. Your responses are important in helping the IRS understand how to better serve individual tax professionals like yourself.

In thinking of your experiences, concentrate on the individual tax returns (for example, W2 filers) you have prepared in the past year. Our first few questions are about your satisfaction with tax services and products provided by the IRS.

II. Tax Professional Satisfaction

Q1. On a scale of 1 to 5, where 1 means very dissatisfied and 5 means very satisfied, considering all your experiences in the past year, overall, how satisfied are you with the tax services provided by the IRS to you in your role as a tax professional?

- 00 Did not use
- 01 Very dissatisfied
- 02
- 03
- 04
- 05 Very satisfied
- 08 [DK]
- 09 [Refused]

Q2. The IRS provides many tax services and products to tax professionals to help them complete the tax returns of their clients. I will ask you two questions about several of these resources. First, are you aware of this service or product? Second, if you have used this resource or service in the last 12 months, how satisfied are you with it? Please use the same scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied. If you did not use this service in the past 12 months, please tell me. [Read A & B; Read and rotate C-J]

A. IRS's Practitioner Priority Service professional support line

1. Are you aware of this service?
 - 01 Yes
 - 02 No (Skip to Q2B)
 - 08 [DK] (Skip to Q2B)
 - 09 [Refused] (Skip to Q2B)

2. How satisfied are you with this service?
 - 00 Did not use
 - 01 Very dissatisfied
 - 02
 - 03
 - 04
 - 05 Very satisfied
 - 08 [DK]
 - 09 [Refused]

B. The IRS Toll-Free Telephone Line

1. Are you aware of this service?

- 01 Yes
- 02 No (Skip to Q2C)
- 08 [DK] (Skip to Q2C)
- 09 [Refused] (Skip to Q2C)

2. How satisfied are you with this service?

- 00 Did not use
- 01 Very dissatisfied
- 02
- 03
- 04
- 05 Very satisfied
- 08 [DK]
- 09 [Refused]

C. IRS tax publications

1. Are you aware of this service?

- 01 Yes
- 02 No (Skip to Q2D)
- 08 [DK] (Skip to Q2D)
- 09 [Refused] (Skip to Q2D)

2. How satisfied are you with this service?

- 00 Did not use
- 01 Very dissatisfied
- 02
- 03
- 04
- 05 Very satisfied
- 08 [DK]
- 09 [Refused]

D. IRS Nationwide Tax Forums

1. Are you aware of this service?

- 01 Yes
- 02 No (Skip to Q2E)
- 08 [DK] (Skip to Q2E)
- 09 [Refused] (Skip to Q2E)

2. How satisfied are you with this service?

- 00 Did not use
- 01 Very dissatisfied
- 02
- 03
- 04
- 05 Very satisfied
- 08 [DK]
- 09 [Refused]

E. IRS Offices (walk-in centers, or Taxpayer Assistance Centers)

1. Are you aware of this service?
 - 01 Yes
 - 02 No (Skip to Q2F)
 - 08 [DK] (Skip to Q2F)
 - 09 [Refused] (Skip to Q2F)

2. How satisfied are you with this service?
 - 00 Did not use
 - 01 Very dissatisfied
 - 02
 - 03
 - 04
 - 05 Very satisfied
 - 08 [DK]
 - 09 [Refused]

F. Written correspondence with the IRS other than e-mail

1. Are you aware of this service?
 - 01 Yes
 - 02 No (Skip to Q2G)
 - 08 [DK] (Skip to Q2G)
 - 09 [Refused] (Skip to Q2G)

2. How satisfied are you with this service?
 - 00 Did not use
 - 01 Very dissatisfied
 - 02
 - 03
 - 04
 - 05 Very satisfied
 - 08 [DK]
 - 09 [Refused]

G. E-mails from the IRS regarding tax law changes

1. Are you aware of this service?
 - 01 Yes
 - 02 No (Skip to Q2H)
 - 08 [DK] (Skip to Q2H)
 - 09 [Refused] (Skip to Q2H)

2. How satisfied are you with this service?
 - 00 Did not use
 - 01 Very dissatisfied
 - 02
 - 03
 - 04
 - 05 Very satisfied

- 08 [DK]
- 09 [Refused]

H. IRS advanced notices

1. Are you aware of this service?
 - 01 Yes
 - 02 No (Skip to Q2I)
 - 08 [DK] (Skip to Q2I)
 - 09 [Refused] (Skip to Q2I)

2. How satisfied are you with this service?
 - 00 Did not use
 - 01 Very dissatisfied
 - 02
 - 03
 - 04
 - 05 Very satisfied
 - 08 [DK]
 - 09 [Refused]

I. Biweekly e-news sent by the IRS to tax professionals

1. Are you aware of this service?
 - 01 Yes
 - 02 No (Skip to Q2J)
 - 08 [DK] (Skip to Q2J)
 - 09 [Refused] (Skip to Q2J)

2. How satisfied are you with this service?
 - 00 Did not use
 - 01 Very dissatisfied
 - 02
 - 03
 - 04
 - 05 Very satisfied
 - 08 [DK]
 - 09 [Refused]

J. Tax Hints Practitioners Guide to the Filing Season

1. Are you aware of this service?
 - 01 Yes
 - 02 No (Skip to Q3)
 - 08 [DK] (Skip to Q3)
 - 09 [Refused] (Skip to Q3)

2. How satisfied are you with this service?
 - 00 Did not use
 - 01 Very dissatisfied
 - 02

- 03
- 04
- 05 Very satisfied
- 08 [DK]
- 09 [Refused]

Q3. As you may know, there are many resources available to tax professionals on the IRS's website—www.IRS.gov. Again, I will ask you two questions about several of these resources. First, are you aware of this resource? Second, if you have used this resource in the last 12 months, how satisfied are you with it? Please use the same scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied. If you did not use this service in the past 12 months, please tell me. [\[Read A; Read and rotate B-D\]](#)

A. The IRS website as a whole

1. Are you aware of this service?
 - 01 Yes
 - 02 No (Skip to Q3B)
 - 08 [DK] (Skip to Q3B)
 - 09 [Refused] (Skip to Q3B)

2. How satisfied are you with this service?
 - 00 Did not use
 - 01 Very dissatisfied
 - 02
 - 03
 - 04
 - 05 Very satisfied
 - 08 [DK]
 - 09 [Refused]

B. Online AMT Assistance (calculator)

1. Are you aware of this service?
 - 01 Yes
 - 02 No (Skip to Q3C)
 - 08 [DK] (Skip to Q3C)
 - 09 [Refused] (Skip to Q3C)

2. How satisfied are you with this service?
 - 00 Did not use
 - 01 Very dissatisfied
 - 02
 - 03
 - 04
 - 05 Very satisfied
 - 08 [DK]
 - 09 [Refused]

C. Online EITC Assistant (calculator)

1. Are you aware of this service?
 - 01 Yes
 - 02 No (Skip to Q3D)
 - 08 [DK] (Skip to Q3D)
 - 09 [Refused] (Skip to Q3D)

2. How satisfied are you with this service?
 - 00 Did not use
 - 01 Very dissatisfied
 - 02
 - 03
 - 04
 - 05 Very satisfied
 - 08 [DK]
 - 09 [Refused]

D. IRS e-services

1. Are you aware of this service?
 - 01 Yes
 - 02 No (Skip to Q4)
 - 08 [DK] (Skip to Q4)
 - 09 [Refused] (Skip to Q4)

2. How satisfied are you with this service?
 - 00 Did not use
 - 01 Very dissatisfied
 - 02
 - 03
 - 04
 - 05 Very satisfied
 - 08 [DK]
 - 09 [Refused]

Q4. What additional tax administration services would you like to receive from the IRS to support you as a tax professional? In other words, are there any services that the IRS does not currently provide to you that would help you better serve your clients?

[Open End]

III. Resources

Q5. There are also many resources available outside IRS that tax professionals can use to help them complete the tax returns of their clients. Please tell me if you have used each of the following resources in the last 12 months to help you complete a client's tax return. If you are not aware of a resource, please tell me. [Read and rotate A-E]

- A. Non-IRS books and publications
- B. Tax preparation software
- C. Websites other than the IRS website
- D. Professional Associations or Organizations—for example, associations for tax professionals or CPAs
- E. Peers or colleagues

- 01 Used this resource
- 02 Did not use this resource
- 03 Not aware
- 06 [Not applicable/Have not used/No experience]
- 08 [DK]
- 09 [Refused]

Q6. Now I'm going to ask you about tax law issues for which you may have sought assistance when helping an individual client during the past 12 months. First, I will ask you whether or not you sought assistance on this particular issue. If Yes, I will ask if you sought assistance from the IRS, from a resource outside the IRS, or from both the IRS and non-IRS resources. For each of the following items, did you seek assistance or information concerning...? [Read and rotate A-G]

- A. Alternative Minimum Tax
- B. Estate and Gift Taxes
- C. Retirement and Pension Income
- D. Itemized deductions
- E. Definition of a child
- F. Earned Income Tax Credit
- G. Innocent Spouse Relief

1. Did you seek assistance or information on...? [Read and rotate A-G]

- 01 Yes
- 02 No (Skip to next item)
- 08 [DK] (Skip to next item)
- 09 [Refused] (Skip to next item)

2. From whom did you seek assistance or information on this tax law issue? [Check all that apply.]

- 01 Sought assistance from the IRS
- 02 Sought assistance from a non-IRS resource
- 08 [DK]
- 09 [Refused]

Q7. Thinking back over the past 12 months, how did you get your tax law information? Again, please let me know, Yes or No. Did you get tax law information from...? [Read list and check all that apply.]

- A. IRS Practitioner Priority Service (PPS) professional support line
- B. IRS Toll-Free telephone line
- C. IRS Offices (walk-in centers, or Taxpayer Assistance Centers)
- D. IRS Website (www.irs.gov)
- E. E-mails from the IRS regarding tax law changes
- F. Written correspondence with the IRS other than e-mail
- G. IRS tax publications

- H. Professional Associations or Organizations
- I. Professional Tax Research or Preparation Software
- J. Peers and colleagues
- K. Websites other than the IRS website
- L. IRS Nationwide Tax Forums on tax laws, compliance, and ethics

- 01 Yes
- 02 No
- 08 [DK]
- 09 [Refused]

Q8. IF Q7A= 01 ASK, ALL ELSE SKIP TO Q9
How often did you use the IRS Practitioner Priority Service (PPS) professional support line while preparing tax returns for your clients in the last year?

- 01 Call once a week or more
- 02 Call at least once a month
- 03 Call less than once a month
- 07 Never
- 08 [DK]
- 9 [Refused]

Q9. In your experience, what are the three best ways to get tax information to help you prepare 1040 returns for individual clients?

(Open End; Probe for three responses)

Q10. Thinking back over the past 12 months, how did you receive your tax forms and publications? For each of the following, please let me know, Yes or No. Did you receive your tax forms and publications from...? [Read list and check all that apply.]

- A. The IRS—electronic forms and publications
- B. The IRS—paper forms and publications
- C. Professional Association/Organization
- D. Professional Tax Research or Preparation Software
- E. Tax Preparation Software, i.e., TurboTax
- F. Any other source not mentioned (specify)

- 01 Yes
- 02 No
- 08 [DK]
- 09 [Refused]

Q11. How can the IRS improve customer service to tax professionals?
(Open End)

IV. Taxpayer Demographics

The next few questions are about the taxpayers you serve.

Q12. In the past 12 months, please tell me approximately how many of your tax returns were prepared for each of the following populations—None of my returns, A few, Some, Most, or All of my returns.

- A. Seniors (65 Years and above)
- B. Schedule C filers/Small Business Owners
- C. Military
- D. People with disabilities
- E. Limited English Proficiency taxpayers
- F. Earned Income Tax Credit recipients

- 01 None
- 02 A few
- 03 Some
- 04 Most
- 05 All
- 08 [DK]
- 09 [Refused]

Q13. Do you or anyone else in your office communicate with clients in languages other than English?

- 01 Yes
- 02 No [Skip to Q14]
- 08 [DK] [Skip to Q14]
- 09 [Refused] [Skip to Q14]

Q14. Which languages besides English do you or someone else in your office use to communicate with clients? (Read list and check all that apply)

- A. Spanish
- B. Chinese
- C. Vietnamese
- D. Korean
- E. Russian
- F. Other (specify)

- 01 Use this language
- 02 Do not use this language
- 08 [DK]
- 09 [Refused]

V. Tax Professional Demographics

We'll now ask you a few questions about your individual practice, not your entire firm

Q15. Are you an Electronic Return Originator (ERO)?

- 01 Yes
- 02 No
- 08 [DK]
- 09 [Refused]

Q16. If you do not file your clients' returns electronically, we are interested in the reasons. For each of the following choices, please tell me, Yes or No, whether it is a reason that you do not file electronically. [Read and rotate A-E]

- A. Cost
- B. Taxpayer preference
- C. Not sure how to file electronically
- D. Am not approved to file returns electronically
- E. Registering to file electronically is too much trouble
- F. Any other reason not mentioned (specify)

- 01 Yes
- 02 No
- 03 I do file electronically [Skip to Q17]
- 08 [DK]
- 09 [Refused]

Q17. How many years have you prepared tax returns professionally?

- 01 Less than one year
- 02 1-5 years
- 03 6-15 years
- 04 16-25 years
- 05 26 years or more
- 08 [DK]
- 09 [Refused]

Q18. Please indicate which of the following best describes your status as a tax professional.

- 01 Self-employed working year round
- 02 Self-employed working mainly during tax season
- 03 Employed by a tax service year round
- 04 Employed by a tax service mainly during tax season
- 08 [DK]
- 09 [Refused]

Q19. IF Q18 = 03,04, ASK. ALL ELSE SKIP TO Q20

Is your practice a local affiliate of a large tax firm?

- 01 Yes
- 02 No
- 08 [DK]
- 09 [Refused]

Q20. Which category of tax professional are you? [Read and record all that apply]

- 01 Enrolled Agent
- 02 Certified Public Accountant
- 03 Tax attorney
- 04 Other tax professional employed by a small/regional tax preparation firm
- 05 Other tax professional employed by a national tax preparation firm
- 06 Other (specify)
- 08 [DK]

09 [Refused]

VI. Close

CLOSE1 That concludes this survey. The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests along with the address where you can send comments regarding the study. The OMB number for this study is **XXXX-XXXX**. Would you like the address where you can send comments?

- 01 Yes
- 02 No [Skip to Close3]
- 08 [DK] [Skip to Close3]
- 09 [Refused] [Skip to Close3]

CLOSE2 If you have any comments regarding this study, please write to: IRS, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Avenue, NW, Washington, DC 20224. [The OMB number assigned to this study is 1545-1432.](#)

CLOSE3. That concludes our survey. Your responses will be very helpful for the IRS in better serving your needs and the needs of your clients. On behalf of the IRS and Macro International Inc., thank you very much for your participation.