

W&I Market Segment Survey 2007

May 2, 2007

n=3,100 (400 OF WHICH ARE SPANISH-SPEAKING)

Hello, this is _____ calling for the Internal Revenue Service, the federal tax collection agency. The IRS is trying to improve its services by asking customers about their experiences and opinions. This interview is being conducted for the IRS by an independent national research organization, SRBI, so that your answers will be confidential and no personal identifying information will be released to the IRS. **(Verify that you are speaking with an adult over age 18)**

(If Spanish Speaker responds, hang up and make note for Spanish callbacks)

REFCON TACK-UP

(If respondent is hesitant, read:)

Your answers will help the Internal Revenue Service reduce the burden on the average taxpayer in preparing and filing their taxes. They will also help the IRS in finding ways to improve the level of service they provide to taxpayers.

(If respondent is still hesitant, read:)

The interview is strictly confidential. We are bound by law not to link the answers you give with any information that could be used to identify you. Neither the IRS nor anyone else will know who you are or what answers you personally provided. We do this so that you can be comfortable in telling us what you really think, not what you think the government wants to hear.

(If respondent is still hesitant, read:)

It doesn't take very long and we can schedule it at a time convenient to you. We need to represent the opinions of busy people like you, as well as people who have more time to present an accurate picture to the IRS of what the public thinks and wants.

(If not familiar with filing taxes, or not adult in household, read:) I need to speak to the adult in the household who is the most familiar with filing taxes. May I please speak to that person?

(If asks about length, read:) The survey will take about 20 minutes to complete. However, if you are unable to complete the survey at this time, we can call you back at your convenience.

(If asks how they were selected, read:) You were randomly selected from all households in the U.S. with telephone numbers. The IRS does not know your identity, and we are prohibited from ever disclosing your name or number to the IRS or to anyone else.

(If used a professional preparer to file return, read:) This is an opinion survey about YOUR experiences in preparing and filing your taxes. It's okay if you used a tax professional to help prepare your returns. We need to talk to all kinds of people to get a true picture of what Americans think, not just what "experts" say.

- 1 Respondent available **(Continue)**
- 2 Respondent not available/Not a good time - **(Set time to call back)**
- 3 (Soft refusal)
- 4 (Hard refusal) **(Thank and Terminate)**

S1. We would like to hear your experiences and opinions as a taxpayer.

- Continue.....1 **GO TO S1a**
- No, it's a bad time.....2 ARRANGE CALLBACK
- Want to think about it.....3 ARRANGE CALLBACK
- Refused.....6 RECORD REASON

S1a. Did you or your spouse file a FEDERAL INCOME TAX RETURN this year for income earned in 2006?

- Yes, you or spouse filed federal tax return.....1 **SKIP TO S1d**
- No federal income tax return filed for 2005 taxes..2 **CONTINUE**
- Not sure/Refused..... 3 **CONTINUE**

S1b. Did *anyone else* in your household file a Federal Income Tax Return this year for income earned in 2006?

- Yes, you or your spouse.....1 **SKIP TO S1d**
- Yes, someone else.....2 **ASK TO SPEAK TO PERSON; GO TO INTRO2**
- No, no one did.....3 **CONTINUE**

S1c. Did you *not* file a federal income tax return this year for 2006 taxes because you....

READ LIST AND SINGLE RECORD

- Got an extension.....1 **SCREEN OUT**
- Were under the income limit for filing.....2 **SCREEN OUT**
- Were a dependent of someone outside the household.....3 **SCREEN OUT**
- Something else (SPECIFY).....4 **SCREEN OUT**
- Not sure/refused.....5 **SCREEN OUT**
- Did file federal tax return.....6 **SKIP TO S1d**

INTRO2

Hello, this is _____ calling for the Internal Revenue Service, the federal tax collection agency. The IRS is trying to improve its services by asking customers about their experiences and opinions. This interview is being conducted for the IRS by an independent national research organization, SRBI, so that your answers will be confidential and no personal identifying information will be released to the IRS. **(Verify that you are speaking with an adult over age 18.)**

S1d. **(Spanish-speakers only):** Is your preferred language Spanish?

- 1 Yes **(Continue)**
- 2 No **(Switch to English language version)**

S1e. **(Spanish-speakers only):** How well do you read Spanish?

- 1 Very well
- 2 Well
- 3 Not well
- 4 Not at all
- 5 (DK)
- 6 (Refused)

S1f. **(Spanish-speakers only):** How well do you read *English*?

- 1 Very well
- 2 Well
- 3 Not well
- 4 Not at all
- 5 (DK)
- 6 (Refused)

S2. Would you say that you are the adult in your household who is most familiar with the preparation and filing of your 2006 federal income tax return **(Spanish version, add: and your preferred language is Spanish)?**

Yes, most familiar.....1

Equally familiar.....2

Not most/equally familiar....3 **ASK TO SPEAK TO THAT PERSON; GO TO INTRO2**

S3. Who was the main person who prepared your taxes? Was it **(read 1-5)?**

- 1 You (yourself)
- 2 A friend or family member (relative)
- 3 The IRS
- 4 A volunteer (at a Volunteer Income Tax Assistance or Tax Counseling for the Elderly site where volunteers prepare your taxes)
- 1 A paid tax professional, such as an accountant, or a tax preparation firm
- 5 **(Spanish-only)** Notario
- 7 **(DK) (Thank, terminate and tally)**
- 8 **(Refused) (Thank, terminate and tally)**

S4. Which of the following best describes the filing status you used on your return? Please listen to all of the categories before responding. **(Read 1-5)**

- 1 Single
- 2 Married, filing jointly
- 3 Married, filing separately
- 4 Head of Household (single with dependent parent or child)
- 5 Qualifying widow(er) with dependent child
- 6 (DK)
- 7 (Refused)

(If self-filer in S3 and DK/Ref to S4, end interview)

S5. What is the zip code where you lived when you filed your 2006 taxes? (Open-ended **and code all five digits of zip code**)

- _____ (DK) **(Ask S5a)**
99999 (Refused) **(Ask S5a)**

(CATI: Check Zip Code against database of valid U.S. Zip Codes; if Invalid Zip Code, Ask S5a; otherwise, go to S6)

S5a. What city and state did you live in when you filed your 2006 taxes?

- _____ **(OPEN END)**
DK **(Thank, Terminate and Save Case ID)**
Refused **(Thank, Terminate and Save Case ID)**

S6. Which of the following forms were used to file your 2006 tax return (tax return filed in 2007 for income earned in year 2006)?**(Read list)**

- 1 Short form 1040EZ - did not itemize deductions
- 2 Short form 1040A - did not itemize deductions
- 3 Long form 1040 without other forms or schedules - did not itemize deductions
- 4 Long form 1040, with other forms or schedules -did itemize deductions
- 5 (Long form, don't remember if had other forms/schedules)
- 7 (Don't know, someone else prepared or filed it)
- 8 (Refused)

(If code 1, 2, 3, or 6 in S6, Skip to Q1; If code 7 or 8 in S5, skip to S6b; If code 4 or 5 in S6, Continue;)

S6a. Which of the following schedules were filed with your 2006 return? Did you file a **(read list):**
[CATI: SEPARATE QUESTION FOR EACH ITEM]

A. Schedule A for itemized deductions including home mortgage deductions, charitable contributions, and other types of deductions 1—Yes 2—No 3—(DK) 4—(Ref)

B. Schedule B for interest and dividend income 1—Yes 2—No 3—(DK) 4—(Ref)

C. Schedule C, for small business income 1—Yes 2—No 3—(DK) 4—(Ref)

D. Schedule D, for capital gains or losses 1—Yes 2—No 3—(DK) 4—(Ref)

E. Schedule E, for supplemental income, such as rental income, royalties, and trusts
1—Yes 2—No 3—(DK) 4—(Ref)

F. Schedule F, for farm income 1—Yes 2—No 3—(DK) 4—(Ref)

S6b. Did you report any of the following types of income on your 2006 federal tax return (for income earned in year 2006)? How about **(read list)**? [**CATI: SEPARATE QUESTION FOR EACH ITEM**]

A. Income or losses from a farm or business you own 1—Yes 2—No 3—(DK) 4—(Ref)

B. Income or losses from rental property 1—Yes 2—No 3—(DK) 4—(Ref)

C. Income or losses from royalties 1—Yes 2—No 3—(DK) 4—(Ref)

D. Income or losses from a partnership or S Corporation 1—Yes 2—No 3—(DK) 4—(Ref)

E. Income or losses from an estate or trust 1—Yes 2—No 3—(DK) 4—(Ref)

S5c. Was a Form 2106 for employee business expenses filed with your return?

1 Yes **(Thank and Terminate)**

2 No **(Continue)**

3 (DK) **(Thank and Terminate)**

4 (Refused)**(Thank and Terminate)**

I. GETTING TAX INFORMATION AND FORMS: ALL RESPONDENTS

First, I'd like to ask you some questions about how you receive tax-related information.

1. Where did you get general tax information, including information about changes in tax laws and forms and instructions for 2006 taxes? **(Multiple Response. Probe if necessary; we are looking for location/organization)**

- 1 IRS
- 2 Accountant/tax preparer
- 3 Bank
- 4 Church/religious group
- 5 Community center
- 6 Education institution/school
- 7 Employer
- 8 Family/Friend

- 9 Library
- 10 Local community outreach group
- 11 Newspapers
- 12 Notario **(Spanish-only)**
- 13 Other website (non-IRS)
- 14 Post Office
- 15 Radio
- 16 Television
- 17 Union/trade organization
- 18 Other (Do NOT list)
- 19 (DK)
- 20 (Refused)

2. **(If selected 'IRS' in Q1)** How did you get this general tax information and forms & pubs **from the IRS?** Is it **(read list)? (Select One Only- multiple response?)**

- 1 From direct mailings from the IRS
- 2 From the IRS Web site
- 3 By contacting the IRS by phone to get information
- 4 By contacting the IRS in person to get information
- 5 By attending an IRS sponsored tax class or seminar
- 6 OR, some other way
- 7 (DK)
- 8 (Refused)

3. Where did you go to get your forms and instructions about filing your 2006 taxes? **(Allow all that apply. Prompt if necessary) [CATI: MULTIPLE-RECORD]**

- 1 Accountant or tax preparer
- 2 Bank
- 3 Copy Center

- 4 Employer or Workplace
- 5 IRS office
- 6 IRS toll-free line
- 7 IRS website
- 8 Other Website (non-IRS)
- 9 Library
- 10 Other government office
- 11 Post office
- 12 Tax preparation software, for example Turbo Tax

- 13 Some other place (**Do not read**)
- 14 (DK)
- 15 (Refused)

4. (If Accountant , DK or Refused in Q1, skip to Q5; otherwise, continue) Did you find the information that you needed from a/an(read each location mentioned from Q1 and Q2) [CATI: MULTIPLE-RECORD]

Show the list as in Q1 and Q2

- | | | | |
|----|---|-----|----|
| 1 | Bank | Yes | No |
| 2 | Copy Center | Yes | No |
| 3 | Employer or Workplace | Yes | No |
| 4 | IRS office | Yes | No |
| 5 | IRS toll-free line | Yes | No |
| 6 | IRS website | Yes | No |
| 7 | Other Website (non-IRS) | Yes | No |
| 8 | Library | Yes | No |
| 9 | Other government office | Yes | No |
| 10 | Post office | Yes | No |
| 11 | Tax preparation software, for example Turbo Tax | Yes | No |
| 12 | Some other place (Do not read) | Yes | No |
| 13 | (DK) | | |
| 14 | (Refused) | | |

CATI PROGRAM: FORM SPLIT 1/3 RESPONDENTS TO BE ASKED LIST A, 1/3 LIST B, 1/3 LIST C

- 1 List A
- 2 List B
- 3 List C

5. In the future, would you consider getting tax law information, tax forms or instructions from any of the following places? I'm going to read a list places, please answer yes or no for each one (**Read list. Enter all that apply**).[CATI: MULTIPLE-RECORD]

LIST A

- 1 Have IRS mail material to you
- 2 An IRS Kiosk (like an ATM bank machine) **Is this still a viable option?**
- 3 By e-mailing the IRS
- 4 A Bank
- 5 A Copy Center
- 6 A Library

7 Tax preparation software, for example Turbo Tax,

LIST B

- 8 An IRS office
- 9 The IRS Toll-Free line
- 10 A Church
- 11 Your Employer or Workplace
- 12 A Post Office
- 13 Another government office

LIST C

- 14 An Accountant or tax preparer
- 15 A Community center
- 16 The IRS Website
- 17 Some Other Website (non-IRS)
- 18 A store (e.g. Walmart, Grocery store)
- 19 An Internet chat room (online interactive text conversations)

ALL RESPONDENTS HAVE THESE CODES

- 22 OR some other place (Do NOT list)
- 23 (VOL) No to all
- 24 (DK)
- 25 (Refused)

6. (Spanish-only) If tax forms become available in Spanish in the future, would you use them to prepare your own tax return?

- 1 Yes, definitely
- 2 Probably
- 3 Maybe not the first year, but sometime
- 4 Probably not
- 5 Definitely not, I'll always have someone else prepare taxes

6a. (Spanish-only) If tax form instructions become available in Spanish in the future, would you use them to learn more about filing and preparing your own tax return?

- 1 Yes, definitely
- 2 Probably
- 3 Maybe not the first year, but sometime
- 4 Probably not
- 5 Definitely not, I'll always have someone else prepare taxes

(Self-filers, friends, relatives from S3, continue; otherwise, skip to Q8)

7. How did [you/your friend or relative **(fill from S3)**] *prepare* your 2006 taxes? By this, we mean filling out the forms and not necessarily the actual filing task. Did [you/your friend or relative **(fill from S3)**] prepare them **(read list)**? **(Interviewer: if respondent answers both by hand and on computer, select "On the computer")? (Enter all that apply)**

- 1 By hand, using IRS tax forms
- 2 On the computer, using a purchased computer program (such as TurboTax)
- 3 On the computer, using Free File on the IRS website
- 3 (DK)
- 4 (Refused)

8. This year, did the IRS mail you a booklet that included forms and instructions?

- 1 Yes - **(Continue)**
- 2 No **(Skip to Q10)**
- 3 (DK) **(Skip to Q10)**
- 4 (Refused) **(Skip to Q10)**

9. **(If yes in Q8, ask:)** Did it include all the forms, schedules, and instructions you needed, or did you need to get additional materials?

- 1 Had all the information I needed
- 2 Needed to get more materials
- 3 (DK)
- 4 (Refused)

10. If an IRS kiosk, which is like an ATM bank machine, was in a secure location such as a federal building or post office, would you consider using it to **(read list and check all that apply): [CATI: MULTIPLE-RECORD]**

- 1 Make a payment
- 2 File a simple tax return such as 1040 EZ where just income and income tax withholdings are reported, or
- 3 Would you not consider using a kiosk?
- 4 (DK)
- 5 (Refused)

11. During the past year the IRS' Earned Income Credit (EIC) advertising campaign was, "Too bad everything can't be as easy as knowing if you qualify for EIC". Have you seen or heard this advertisement?

- 1 Yes
- 2 No **(Skip to Q13)**
- 3 (DK) **(Skip to Q13)**
- 4 (Refused) **(Skip to Q13)**

12. Where did you see or hear the advertisement. **(Select all that apply)**
[CATI: MULTIPLE-RECORD] Do Not Read List

- 1 Don't remember where
- 2 Billboard
- 3 Friend/family/colleague
- 4 Internet
- 5 Magazine

- 6 Newspaper
- 7 Poster/brochure/flyer
- 8 Public transportation (bus, train, etc.)
- 9 Radio
- 10 Television
- 11 Other
- 12 (Refused)

(Self filers, friends/relatives in S3, continue; otherwise, skip to Q14)

13. Please rate your satisfaction with the ease of getting your tax forms / instructions and general tax information? Please rate your satisfaction on a scale of one-to-five where 1 is very dissatisfied and 5 is very satisfied.

5 Very satisfied.....1 Very dissatisfied 6 (DK) 7 (Refused)

II. IRS INTERACTIONS IN PAST 12 MONTHS AND CHANNEL AWARENESS

My next questions are about any contact you may have had with the Internal Revenue Service (IRS) in the past 12 months, including visiting the IRS website.

14. Did you: **(READ LIST)**

1—Yes 2—No 3—(DK) 4—(Ref)

- 14a Call the IRS TF line for any reason in the past 12 months?
- 14b. Visit the local IRS office for any reason in the past 12 months?
- 14c Contact the IRS through regular mail for any reason in the past 12 months?
- 14d Visit the IRS website to obtain information or forms for any reason in the past 12 months? Please do not include casual browsing.
- 14e Email the IRS for any reason in the past 12 months?

CHANNEL EXPERIENCE

Toll-Free

(If Q14a= YES, ask the Toll-Free section)

15. You've indicated that you called the IRS TF line in the past year. Was there anything difficult about using the Toll-Free line?

- 1 Yes **(Continue)**
- 2 No **(Skip to Q15b)**
- 3 (DK) **(Skip to Q15b)**
- 4 (Refused) **(Skip to Q15b)**

15a. What about using the Toll-Free line was difficult for you? I will read a list of items and you can say yes or no to each one. What about...? **(Read list and allow respondent to say yes or no to each option) [CATI: MULTIPLE-RECORD]**

- | | | | |
|---|---|-----|----|
| 1 | Getting correct answers to your question | Yes | No |
| 2 | Understanding the answer | Yes | No |
| 3 | Ease of getting through on Toll-Free line | Yes | No |
| 4 | Time it took to get the information | Yes | No |
| 5 | Something Else (Please Specify) _____ | Yes | No |
| 6 | (Refused) | | |

15b. Did you hang up before getting through or before receiving the information you needed?

- 1 Yes **(Continue)**
- 2 No **(Skip to Q15e)**
- 3 (DK) **(Skip to Q15e)**
- 4 (Refused) **(Skip to Q15e)**

15c. How many times did this happen?

- _____ times
97 97+
98 (DK)
99 (Refused)

15d. Why did you hang up? **(Enter all that apply) [CATI: MULTIPLE-RECORD]**
Do Not Read List

- 1 Kept getting a busy signal
- 2 Placed on hold too long
- 3 Kept getting transferred
- 4 Couldn't understand the menu system
- 5 Too many choices to listen to on the menu system
- 6 Other **(Do not read)**
- 7 (DK)
- 8 (Refused)

15e. Were you transferred more than once when you called?

- 1 Yes
- 2 No
- 3 (DK)
- 4 (Refused)

15f. Did you get unclear information?

- 1 Yes **(Continue)**
- 2 No **(Skip to Q15h)**
- 3 (DK) **(Skip to Q15h)**
- 4 (Refused) **(Skip to Q15h)**

15g. **(If yes to Q15f)** How many times did this happen?

- _____ times
97 97+
98 (DK)
99 (Refused)

15h. If you knew you had to wait 10 minutes to receive service from a representative at the taxpayer assistance center, how likely would you be to continue to hold?

- 1 Not at all likely
- 2 Not very likely

- 3 Somewhat likely
- 4 Very likely
- 5 (DK)
- 6 (Refused)

15i. Think about all aspects of using the IRS Toll-Free line **Spanish-only: in Spanish**. Please rate your satisfaction with using the Toll-Free line using a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied.

5 Very satisfied.....1 Very dissatisfied 6 (DK) 7 (Refused)

Field Assistance
(IF Q14b=YES, continue with this section)

16. You've indicated that you visited the local IRS office in the past year. Was there anything difficult about using the IRS office (Taxpayer Assistance Center)?

- 1 Yes **(Continue)**
- 2 No **(Skip to Q16b)**
- 3 (DK) **(Skip to Q16b)**
- 4 (Refused) **(Skip to Q16b)**

16a. What about using the IRS Office (Taxpayer Assistance Center) was difficult for you? I will read a list of items and you can say yes or no to each one. What about...? **(Read list and allow respondent to say yes or no to each option) [CATI: MULTIPLE-RECORD]**

- | | | | |
|---|---|-----|----|
| 1 | Travel time to get to the IRS office (Taxpayer Assistance Center) | Yes | No |
| 2 | Wait time, or time standing in line, to reach a representative | Yes | No |
| 3 | Getting correct answers to your question | Yes | No |
| 4 | Understanding the answer | Yes | No |
| 5 | Privacy, or being in a public place | Yes | No |
| 6 | Something Else (Please Specify) _____ | Yes | No |
| 7 | (Refused) | | |

16b. Did you go to the local IRS office and left because the wait time appeared to be too long?

- 1 Yes **(Continue)**
- 2 No **(Skip to Q33)**
- 3 (DK) **(Skip to Q33)**
- 4 (Refused) **(Skip to Q33)**

16c. **(If yes to Q16b)** How many times did this happen?

- _____ times
- 97 97+
 - 98 (DK)
 - 99 (Refused)

16d. I am going to read a list and please tell me the top two reasons why you visited a local office instead of using the toll-free line to get information from the IRS? (**read and rotate list**) [CATI: MULTIPLE-RECORD]

- 1 The way I used to do it
- 2 Faster than waiting on the phone.
- 3 Didn't think about it/Didn't know about it
- 4 Question was specific/Too complicated
- 5 Didn't think I could get the information over the phone
- 6 Wanted to show someone the papers that I received/was working on
- 7 Wanted to talk to a person
- 8 Didn't think I could get help in Spanish (**Spanish-only**)
- 9 Other (**Do not read**)
- 10 (DK)
- 11 (Refused)

16e. Think about all aspects of using the IRS office (Taxpayer Assistance Center)**Spanish-only: in Spanish.** Please rate your satisfaction with using the IRS office (Taxpayer Assistance Center) using a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied.

5 Very satisfied.....1 Very dissatisfied 6 (DK) 7 (Refused)

Regular Mail (IF Q14c=YES, continue with this section)

17. You have indicated that you contacted the IRS through regular mail in the past year. Was there anything difficult about contacting the IRS via regular mail?

- 1 Yes (**Continue**)
- 2 No (**Skip to Q17b**)
- 3 (DK) (**Skip to Q17b**)
- 4 (Refused) (**Skip to Q17b**)

17a. What about contacting the IRS via regular mail was difficult for you? I will read a list of items and you can say yes or no to each one. What about...? (**Read list and allow respondent to say yes or no to each option**) [CATI: MULTIPLE-RECORD]

- | | | | |
|---|--|-----|----|
| 1 | Writing a letter | Yes | No |
| 2 | Time it took to receive a reply from the IRS | Yes | No |
| 3 | Getting correct answers to your question | Yes | No |
| 4 | Understanding the answer | Yes | No |
| 5 | Something Else (Please Specify) _____ | Yes | No |
| 6 | (Refused) | | |

17b. Think about all aspects of contacting the IRS via regular mail **Spanish-only: in Spanish.** Please rate your satisfaction with contacting the IRS via regular mail using a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied.

5 Very satisfied.....1 Very dissatisfied 6 (DK) 7 (Refused)

IRS Website (IF Q14d=YES, continue with this section)

18. You mentioned that you visited the IRS Web site in the past year. Was there anything difficult about using the IRS Web site?

- 1 Yes **(Continue)**
- 2 No **(Skip to Q18b)**
- 3 (DK) **(Skip to Q18b)**
- 4 (Refused) **(Skip to Q18b)**

18a. What about using the IRS Web site was difficult for you? I will read a list of items and you can say yes or no to each one. What about...? **(Read list and allow respondent to say yes or no to each option) [CATI: MULTIPLE-RECORD]**

- | | | | |
|---|----------------------------------|-----|----|
| 1 | Finding the information you need | Yes | No |
| 2 | Using the Search Engine | Yes | No |
| 3 | Understanding the information | Yes | No |
| 4 | Time you spent | Yes | No |
| 5 | Something else (Please Specify) | Yes | No |
| 6 | (Refused) | | |

18b. Were you able to obtain the information you were seeking?

- 1 Yes **(Skip to Q18d)**
- 2 No **(Continue)**
- 3 (DK) **(Skip to Q18d)**
- 4 (Refused) **(Skip to Q18d)**

18c. **(If No to Q18b)**, how many times did this happen?

- _____ times
97 97+
98 (DK)
99 (Refused)

18d. Did you get unclear information?

- 1 Yes **(Continue)**
- 2 No **(Skip to Q18f)**
- 3 (DK) **(Skip to Q18f)**
- 4 (Refused) **(Skip to Q18f)**

18e. **(If yes to Q18d)**, how many times did this happen?

- _____ times
97 97+
98 (DK)

99 (Refused)

18f. Think about all aspects of using the IRS website (**Spanish-only: in Spanish**), please rate your satisfaction with using the IRS website. Use a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied.

5 Very satisfied.....1 Very dissatisfied 6 (DK) 7 (Refused)

Email (IF Q14e=YES, continue with this section)

19. You mentioned that you emailed the IRS in the past year. Was there anything difficult about contacting IRS via email?

- 1 Yes (**Continue**)
- 2 No (**Skip to Q19b**)
- 3 (DK) (**Skip to Q19b**)
- 4 (Refused) (**Skip to Q19b**)

19a. What about contacting the IRS via email was difficult for you? I will read a list of items and you can say yes or no to each one. What about? (**Read list and allow respondent to say yes or no to each option**)
[CATI: MULTIPLE-RECORD]

- | | | | |
|---|--|-----|----|
| 1 | Writing an email message | Yes | No |
| 2 | Time it took to receive a reply from the IRS | Yes | No |
| 3 | Getting correct answers to your question | Yes | No |
| 4 | Understanding the IRS' reply | Yes | No |
| 5 | Something Else (Please Specify) _____ | Yes | No |
| 6 | (Refused) | | |

19b. Think about all aspects of contacting the IRS via email **Spanish-only: in Spanish**. Please rate your satisfaction with contacting the IRS via email using a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied.

5 Very satisfied.....1 Very dissatisfied 6 (DK) 7 (Refused)

Free tax preparation from volunteers:

20. Did you get free tax preparation help from volunteers trained by the IRS?

- 1 Yes (**Continue**)
- 2 No (**Skip to the next section**)

20a. Was there anything difficult about using the free tax preparation services provided by volunteers trained by the IRS?

- 1 Yes (**Continue**)
- 2 No (**Skip to Q20c**)
- 3 (DK) (**Skip to Q20c**)
- 4 (Refused) (**Skip to Q20c**)

20b. What about getting free tax preparation help from volunteers was difficult for you? I will read a list of items and you can say yes or no to each one. What about...? **(Read list and allow respondent to say yes or no to each option) [CATI: MULTIPLE-RECORD]**

- | | | | |
|---|--|-----|----|
| 1 | Travel time to get to the free volunteer tax prep site | Yes | No |
| 2 | Wait time, or time standing in line, to reach a representative | Yes | No |
| 3 | Getting correct answers to your question | Yes | No |
| 4 | Understanding the answer | Yes | No |
| 5 | Privacy/public place | Yes | No |
| 6 | Something Else (Please Specify) _____ | Yes | No |
| 7 | (Refused) | | |

20c. Think about all aspects of getting guidance, help or advice from volunteers **(Spanish-only: in Spanish)** while preparing your 2006 taxes, please rate your satisfaction with getting free tax preparation services from volunteers. Use a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied.

- 5 Very satisfied.....1 Very dissatisfied 6 (DK) 7 (Refused)

20d. How likely would you be to recommend getting free tax preparation help by volunteers who are trained by the IRS, if a friend or family member should ask? Would you be:

- 4 Very likely
- 3 Somewhat likely
- 2 Somewhat unlikely
- 1 Very unlikely
- 6 (DK)
- 7 (Refused)

21. (For non-IRS Web visitors who used TACs or TF) What are the main reasons you visited a local office or used the toll-free line instead of visiting the IRS website to get information from the IRS? [CATI: MULTIPLE-RECORD]

- 1 I'm used to going to local IRS offices
- 2 I'm used to calling the Toll-Free line
- 3 I don't believe I can get my questions answered by using the IRS Web site
- 4 I did try to use the IRS Web site
- 5 I wasn't aware of the IRS Web site
- 6 The letter I received from the IRS said to call a telephone number
- 7 The letter I received from the IRS said to go to a local office
- 8 (Refused)

22. **(Spanish-speakers only)** Were you able to get assistance in Spanish?

- 1 Yes **(Skip to 24)**
- 2 No **(Continue)**
- 3 (DK) **(Skip to Q24)**
- 4 (Refused) **(Skip to Q24)**

23. **(Spanish-speakers only: If no to Q22, ask:)** Why were you unable to get assistance in Spanish?

- 1 I had an interpreter
- 2 No one available
- 3 I speak English well enough to conduct my business
- 4 (Refused)

AWARENESS OF SERVICES

24. Are you AWARE that you can get help from the IRS in the following ways . . .
[CATI: SHOW ONLY ITEMS RESPONDENT SAID NOT USED IN EARLIER SECTIONS]

1—Yes 2—No 3—(DK) 4—(Ref)

- a Calling the IRS Toll-Free line **(Spanish-only: in Spanish)?**
- b Visiting the Local IRS Office (Taxpayer Assistance Center)?
- c E-mailing the IRS **(Spanish-only: in Spanish)?**
- d Sending regular mail to the IRS **(Spanish-only: in Spanish)?**
- e Visiting the IRS Web site **(Spanish-only: in Spanish)?**
- f Volunteers trained by the IRS that provide free tax preparation **(Spanish-only: in Spanish)?**
- g Using an IRS kiosk, which is like an ATM bank machine

25. Are you *aware* that you can track the status of your refund on the IRS Web site?

- 1 Yes
- 2 No **(Skip to Q27)**
- 3 (DK) **(Skip to Q27)**
- 4 (Refused) **(Skip to Q27)**

26. Have you ever checked the status of a refund on the IRS Web site?

- 1 Yes
- 2 No
- 3 (DK)
- 4 (Refused)

27. **(Spanish only)** In 2008, you will be able to track the status of your refund in Spanish on the IRS Web site.
 How likely will you use this feature?

- 4 Very likely
- 3 Somewhat likely
- 2 Somewhat unlikely
- 1 Very unlikely
- 6 (DK)
- 7 (Refused)

28. How did you determine how to contact the IRS? **(Enter all that apply) [CATI: MULTIPLE-RECORD] Do Not Read List**

- 1 Found information in an IRS document or publication
- 2 IRS Website
- 3 Other Website (non-IRS)

- 4 Asked an accountant or tax preparer
- 5 Tax preparation software/Turbo Tax
- 6 Asked a relative or friend
- 7 Newspaper
- 8 Radio
- 9 Telephone book
- 10 Television
- 11 Other **(Do not read)**
- 12 (DK)
- 13 (Refused)

SECTION III: PERCEIVED FIRST CONTACT RESOLUTION

Note to IRS: We need to double check that the eight issues noted below are still the primary issues and that the channels noted below and that channels are still actual and possible channels. Note, do we want to include FSM? If so, need description.

[Programming instruction - Rotate scenarios so that each respondent only answers two questions in this set. Also rotate channels within scenarios so that each respondent answers for only ONE channel in each scenario. Note that not all channels can be used for all scenarios. Also rotate scale to begin at 100% sometimes and 0% others; for each individual respondent, the order of the scale is to be consistent for all channels in BOTH scenarios. That is, half of the respondents will always be asked a 0% to 100%, the other half will always be asked a 100% to 0% scale.]

29a1-29a7. Suppose you needed help with **getting a form or publication**, such as finding out where to obtain a copy of Schedule A for claiming deductions. What percent of the time do you think you'd get that information on the first contact by **(Rotate channel: getting help from a rep at a local IRS, using self-service at a local IRS office, calling the IRS' toll-free automated system, speaking to a rep on the IRS' toll-free line, browsing the IRS website, chatting with an IRS rep online, regular mail)** (Read list as necessary):

- | | |
|-------|------------|
| 1—0% | 7—60% |
| 2—10% | 8—70% |
| 3—20% | 9—80% |
| 4—30% | 10—90% |
| 5—40% | 11—100% |
| 6—50% | 12-- (DK) |
| | 13-- (Ref) |

29b1-29b7: Suppose you needed help with **getting tax return preparation assistance**, such as getting personalized education on completing a tax return, including completion and filing your tax return. What percent of the time do you think you'd get that information on the first contact by **(Rotate channel: getting help from a rep at a local office, calling the IRS' toll-free automated system, speaking to a rep on the IRS' toll-free line, browsing the IRS website, chatting with an IRS rep online, regular mail)** (Read list as necessary):

1—0%	7—60
2—10	8—70
3—20	9—80
4—30	10—90
5—40	11—100%
6—50	12-- (DK)
	13-- (Ref)

29c1-29c7. Suppose you needed help **answering a tax law question**, such as finding out how to file estate taxes or when to itemize deductions. What percent of the time do you think you'd get that information on the first contact by **(Rotate channel: getting help from a rep at a local IRS office, calling the IRS' toll-free automated system, speaking to a rep on the IRS' toll-free line, , browsing the IRS website, chatting with an IRS rep online, regular mail) (Read list as necessary):**

1—0%	7—60%
2—10%	8—70%
3—20%	9—80%
4—30%	10—90%
5—40%	11—100%
6—50%	12-- (DK)
	13-- (Ref)

29d1-29d7: Suppose you needed help with **getting information about payments**, such as finding out where to send your payment or how to establish an installment agreement to monthly pay-off the taxes you owe. What percent of the time do you think you'd get that information on the first contact by **((Rotate channel: getting help from a rep at a local IRS office, calling the IRS' toll-free automated system, speaking to a rep on the IRS' toll-free line, browsing the IRS website, chatting with an IRS rep online, regular mail) (Read list as necessary):**

1—0%	7—60%
2—10%	8—70%
3—20%	9—80%
4—30%	10—90%
5—40%	11—100%
6—50%	12-- (DK)
	13-- (Ref)

29e1-29e7. Suppose you needed help with **getting information about a notice** you received from the IRS, such as finding out what to do about a notice saying you may owe taxes or that an error was made in completing your return. What percent of the time do you think you'd get that information on the first contact by **(Rotate channel: getting help from a rep at a local IRS office, speaking to a rep on the IRS' toll-free line, chatting with an IRS rep online, regular mail) (Read list as necessary):**

1—0%	7—60%
2—10%	8—70%
3—20%	9—80%
4—30%	10—90%
5—40%	11—100%

6—50% 12-- (DK)
 13-- (Ref)

29f1-29f7: Suppose you needed to **obtain your prior year's tax return such as finding out where to get information on a prior year tax return.** What percent of the time do you think you'd get that information on the first contact by **(Rotate channel: getting help from a rep at a local IRS office, calling the IRS' toll-free automated system, speaking to a rep on the IRS' toll-free line, browsing the IRS website, chatting with an IRS rep online, regular mail)** (Read list as necessary):

1—0% 7—60%
2—10% 8—70%
3—20% 9—80%
4—30% 10—90%
5—40% 11—100%
6—50% 12-- (DK)
 13-- (Ref)

29g1-29g7: Suppose you needed to get information about a **refund such as finding out how long it will take to receive your refund.** What percent of the time do you think you'd get that information on the first contact by **(Rotate channel: getting help from a rep at a local IRS office , calling the IRS' toll-free automated system, speaking to a rep on the IRS' toll-free line, browsing the IRS website, chatting with an IRS rep online, regular mail)** (Read list as necessary):

1—0% 7—60%
2—10% 8—70%
3—20% 9—80%
4—30% 10—90%
5—40% 11—100%
6—50% 12-- (DK)
 13-- (Ref)

29h1-29h7: Suppose you needed to **obtain an or Individual Tax ID Number or Employer ID number.** What percent of the time do you think you'd get that information on the first contact by **(Rotate channel: getting help from a rep at a local IRS office , speaking to a rep on the IRS' toll-free line, browsing the IRS website, chatting with an IRS rep online, regular mail)** (Read list as necessary):

1—0% 7—60%
2—10% 8—70%
3—20% 9—80%
4—30% 10—90%
5—40% 11—100%
6—50% 12-- (DK)
 13-- (Ref)

IV. COMPLETING YOUR RETURN AND FILING

My next questions are completing and filing your 2006 taxes.

30. How was your tax return filed this year? Was it **(read list as necessary)**?
- 1 Filed by regular mail
 - 2 Filed electronically by computer (e-file) using a "free-file" option with no fee
 - 3 Filed electronically by computer with a fee using software like TurboTax
 - 4 Delivered in person
 - 5 Not sure, filed by someone else
 - 6 (DK)
 - 7 (Refused)
31. Did you file in the same way as last year?
- 1 Yes
 - 2 No
 - 3 (DK)
 - 4 (Refused)
32. **(If used free-file – Q30=2),** How did you learn about free-file?
- 1 By browsing the IRS web site
 - 2 Friends, colleagues, word of mouth
 - 3 Advertising
 - 4 Other (specify)
 - 5 (DK)
 - 6 (Refused)
33. **(If Q30=2 or 3)** Who electronically filed your tax return?
- 1 Self
 - 2 An accountant or tax preparation firm
 - 3 An IRS representative at a local IRS office
 - 4 A friend or relative
 - 5 A Volunteer at a site such as a VITA- free Volunteer Income Tax Assistance (VITA) or Tax Counseling for the Elderly (TCE) site where volunteers prepare your taxes
 - 6 Employer
 - 7 Notario **(Spanish-only)**
 - 8 (Someone else) **(Do not read)**
 - 9 (DK)
 - 10 (Refused)
34. **(If Q30 is 1, 4-6)** Were you aware that your return could have been filed electronically?
- 1 Yes **(Continue)**

- 2 No (Skip to Q36)
- 3 (DK) (Skip to Q36)
- 4 (Refused) (Skip to Q36)

35 (If Q30=1 or 4) What is the primary reason that your return was not filed electronically? (If necessary, read list)

- 1 (Non self-filer in S3 only) The option was not offered to me
- 2 (Self-filer in S3 only) No access to Internet/computer
- 3 Cost
- 4 Did not know about it/Never thought about it
- 5 Too hard/complex
- 6 Don't trust e-filing (security)
- 7 Like paper filing
- 8 Owed money to the IRS
- 9 Other (Do not read)
- 10 (DK)
- 11 (Refused)

Free File (For non-free-filers. If free filers – Q30=2, skip this section)

If your reported gross income was **xxx** in 2006, you could have qualified for “free file” which allows you to file your return at no cost. To do this, you have to go to the IRS website to see a list of approved tax software vendors in your area.

36. Are you aware of the IRS “free-file” option, where some taxpayers can file electronically at no cost to them?

- 1 Yes (Continue)
- 2 No (Skip to Q38)
- 3 (DK)
- 4 (Refused)

37: Why did you *not* use Free-file?

- 1 Income not qualified
- 2 Wasn't aware of or don't understand what “free file” is
- 3 Instructions too confusing on IRS website
- 4 Difficult to use on 3rd party website
- 5 Don't have confidence in ‘free file’
- 6 Refund anticipation loan provides faster refund
- 7 Don't trust free-file
- 8 (Other specify) _____
- 9 (DK)
- 10 (Refused)

39. Did you owe money to the IRS or did you expect a refund from the IRS for your 2006 Federal income taxes?

- 1 Owed money

- 2 Expected refund
- 3 (Neither)
- 4 (DK)
- 5 (Refused)

40. I will now read you a series of items about preparing and filing your return. Please use a scale of one-to-five where 1 is very dissatisfied and 5 is very satisfied. How satisfied were you with **(read list)**?

5 5 Very satisfied.....1 Very dissatisfied 6 (DK) 7 (Refused) 8 (Not applicable)

(Non self-filers answer Q40a-40d)

- A. The tax advice provided by the person who prepared your taxes
- B. The accuracy of the person who prepared your taxes
- C. The knowledge of the person who prepared your taxes
- D. The time it took that person to prepare your taxes after you provided all the necessary information

(Self-filers answer Q40e-40g)

- E. The time you spent completing your tax return
- F. The ease of understanding what materials and documents to include with your tax return
- G. The ease of understanding where to send your return
- H. **(If e-file through Internet with fee in Q30, ask:)** The amount of money you spent to file your tax return electronically

41a. **(Non self-filers)** Taking all factors into account, please rate your overall satisfaction with the person who completed your return and with filing your return **[(If owed money in Q39, read:) including submitting payment]. (If necessary repeat scale)**

- 5 Very satisfied
- 4
- 3
- 2
- 1 Very dissatisfied
- 6 (DK)
- 7 (Refused)

41b. **(Self-filers)** Taking all factors into account, please rate your satisfaction with preparing and filing your return **[(If owe money in Q39, read:) including submitting payment]. (If necessary repeat scale)**

5 Very satisfied.....1 Very dissatisfied 6 (DK) 7 (Refused)

42. **(Self-filers)** Please tell us what you believe the IRS could do to improve the process of completing and filing your return. **(Open ended)**

(Ask Q43-Q43d for each payment option before going to the next payment option)

43. I will now read several options for submitting payment to the IRS, other than using a personal check. Whether you owed the IRS money this year or not, are you aware that you can **(read list)**? [CATI: **SEPARATE QUESTION FOR EACH ITEM**]

- 1 Pay through an installment agreement, with a fee 1—Yes 2—No 3—(DK) 4—(Ref)
- 2 Pay with a credit card with a fee 1—Yes 2—No 3—(DK) 4—(Ref)
- 3 Pay through electronic funds withdrawal from your bank account
1—Yes 2—No 3—(DK) 4—(Ref)

(If owed money in Q39, continue; otherwise, skip to Q43c1-3)

43a1-3. **(For each payment option aware of in Q43, ask:)** Did you try to use this service during the 2006 tax season? [CATI: **SEPARATE QUESTION FOR EACH ITEM**]

- 1 Pay through an installment agreement, with a fee 1—Yes 2—No 3—(DK) 4—(Ref)
- 2 Pay with a credit card with a fee
- 3 pay through electronic funds withdrawal from your bank account

Users of Installment Agreement with Fee

43b1. **(If yes in 43a-1)** Did it work? 1—Yes 2—No 3—(DK) 4—(Ref)

Users of Credit Card with Fee

43b2. **(If yes in 43a-2)** Did it work? 1—Yes 2—No 3—(DK) 4—(Ref)

Users of EFT

43b3. **(If yes in 43a-3)** Did it work? 1—Yes 2—No 3—(DK) 4—(Ref)

43c1-3. In the future, would you consider **(read list)**? [CATI: **SEPARATE QUESTION FOR EACH ITEM**]

- 1 Pay through an installment agreement, with a fee 1—Yes 2—No 3—(DK) 4—(Ref)
- 2 Pay with a credit card with a fee
- 3 pay through electronic funds withdrawal from your bank account

43d. In the future, would you consider (**read list**)? [CATI: SEPARATE QUESTION FOR EACH ITEM]

IF Q43c1 = YES, DO NOT ASK Q43d1

- 1 Paying through an installment agreement, if there was no fee
1—Yes 2—No 3—(DK) 4—(Ref)

IF Q43c2 = YES, DO NOT ASK Q43d2

- 2 Paying with a credit card if there was no fee 1—Yes 2—No 3—(DK) 4—(Ref)

V. GETTING YOUR REFUND FROM THE IRS

(If expected refund in Q39, continue; otherwise, skip to next section)

I will now ask you some questions about getting your refund from the IRS for your 2006 tax return.

44. Have you received your refund for your 2006 tax return yet? (**If respondent answers that he/she was expecting a return but it was withheld for any reason, code as a "no"**)

- 1 Yes
2 No
3 (DK)
4 (Refused)

45. How many weeks did you wait after filing your tax return before you contacted the IRS? (**code actual number of weeks**)

- _____ weeks
96 Did not contact the IRS about refund
97 97+
98 (DK)
99 (Refused)

46. How did you request to receive your refund?

- 1 Direct deposit
2 Paper check
3 Refund anticipation loan
3 (DK) (**Skip to Q48**)
4 (Refused) (**Skip to Q48**)

47. (**If No Direct Deposit in Q46, ask**): Why didn't you request to receive your refund through direct deposit to your bank account? (**Multiple Response**)

- 1 Do Not Want IRS to Access My Bank Account
2 Do Not Want IRS to Have My Bank Account Number
3 Have No Bank Account
4 Wanted to See Check/Have Check in Hand
5 Not Aware of Direct Deposit Option

- 6 Didn't want/need to
- 7 Forgot/never thought about it
- 8 Didn't want charged for that
- 9 Prefer mail/always do it that way
- 10 Get a faster refund/pick up myself/through preparer
- 11 Other
- 12 (DK)**
- 13 (Refused)**

48. Please rate your satisfaction with the following aspects of getting your refund from the IRS on a scale of one-to-five where 1 is very dissatisfied and 5 is very satisfied. How satisfied were you with **(read list)**?

5 Very satisfied.....1 Very dissatisfied 6 (DK) 7 (Refused) 8 (Not applicable)

- A. **(If received refund in Q44, ask:)** The time it took to receive your refund from the IRS
- B. **(If received refund in Q44, ask:)** The accuracy of your refund
- C. **(If received refund in Q44, ask:)** The IRS's explanation of any adjustments to your refund
- D. **(If not '96 in Q45, ask:)** The ease of making contact with the IRS about your refund
- E. **(If not '96 in Q45, ask:)** Getting a clear answer to your questions when contacting the IRS

(If received refund in Q44, continue; otherwise, Skip to next section)

49. Taking all factors into account, please rate your satisfaction with getting your refund from the IRS for the 2005 tax season? **(If necessary, repeat scale)**

5 Very satisfied.....1 Very dissatisfied 6 (DK) 7 (Refused)

VI. RESOLVING ISSUES AFTER FILING: THOSE WHO RECEIVED NOTICE

My next questions are concerning notices you may have received from the IRS that require action from you.

50. In the past 12 months, have you received a notice in the mail or any communication from the IRS about any federal return that you filed and were asked to respond to?

- 1 Yes - **(Continue)**
- 2 No **(Skip to next section)**
- 3 (DK) **(Skip to next section)**
- 4 (Refused) **(Skip to next section)**

51. For what reason(s) did you receive a notice?

- 1 Under-reported income
- 2 Failure to file a return
- 3 Failure to make payment
- 4 Inadequate withholdings
- 5 Other
- 6 (DK)
- 7 (Refused)

52. How did you handle the most recent notice? Did you **(Read list and check all that apply)**

- 1 Contact IRS yourself with questions
- 2 Responded to the issue yourself without questions
- 3 Have someone else handle it
- 4 Did nothing regarding the notice

53a1-3. How did you contact the IRS about the letter or notice you received? Did you use the **(Read list):**
[CATI: SEPARATE QUESTION FOR EACH ITEM]

53b1-3. **(For each channel with yes in Q53a, ask):** how many times did you contact the **(channel)** about your most recent notice?

		<u>Yes</u>	<u>No</u>	<u>(Don't read)</u> <u>Not Sure</u>	<u>(Don't read)</u> <u>Refused</u>	<u>How many times?</u>
a	Toll-Free line listed in the notice	1	2	3	4	_____
b	Local IRS office (Taxpayer Assistance Center)	1	2	3	4	_____

56. Approximately how many months after you received the notice were you informed that the issue was resolved (**code actual number of months**)

_____ months

97 97+

98 (DK)

99 (Refused)

57. Thinking about all aspects of your most recent experience with an IRS notice, including understanding the notice, the internal IRS coordination, resolving the issue, and time spent, please rate your satisfaction with resolving your notice using a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied.

5 Very satisfied.....1 Very dissatisfied 6 (DK) 7 (Refused)

58. Please tell us what you believe the IRS could have done to make you more satisfied with the resolution of your issue. (**Open-ended**)

	<p>examples) Tax Law Questions(need examples) Payment Information Obtain prior year tax return Refund information Obtain Employer or Individual Tax ID Notice (Don't show if Q73a3=Yes and auto fill with Q73 answer)</p> <p>Other, specify (DK) (Refused)</p>	<p>_____ _____ _____</p>
<p>4. Visiting the IRS Web site (If Q14d=Yes)</p>	<p>Get a form or pub Return Prep Assistance (need examples) Tax Law Questions(need examples) Payment Information Obtain prior year tax return Refund information Obtain Employer or Individual Tax ID</p> <p>Other, specify (DK) (Refused)</p>	<p>_____ _____ _____ _____</p>
<p>5. Emailing the IRS (If Q14e=yes)</p>	<p>Get a form or pub Return Prep Assistance (need examples) Tax Law Questions(need examples) Payment Information Obtain prior year tax return Refund information Obtain Employer or Individual Tax ID</p> <p>Other, specify (DK) (Refused)</p>	<p>_____ _____ _____ _____</p>

SECTION VIII. CONTACTING IRS RE: SAME ISSUE

60. During the past two years, did you ever contact the IRS more than once about the same issue?

- 1 Yes - **(Continue)**
- 2 No **(Skip to next section)**
- 3 (DK) **(Skip to next section)**
- 4 (Refused) **(Skip to next section)**

61. What was your most recent issue about? **Multiple Response (If necessary, read list)**

- 1. Forms and Publications
- 2. Return Preparation Assistance
- 3. Tax Law Questions
- 4. Payments
- 5. Response to IRS Notice
- 6. Prior Year Return Information/transcripts
- 7. Refund Information
- 8. Application for an Individual Tax ID Number or Employer ID Number
- 9. Other (specify _____)
- 10. (DK)
- 11. (Refused)

CATI PROGRAM: IF RESPONDENT MENTIONS MORE THAN ONE ISSUE IN Q61, RANDOMLY SELECT ONE ISSUE, THEN DISPLAY A TEXT SCREEN:

For these next questions, please think about your contact with the IRS regarding [DISPLAY ISSUE]

62. How many times have you had contact with the IRS about the same issue? **(code actual number of times)**
[DISPLAY ISSUE FROM Q61/RANDOM SELECTION]

- _____ times
- 97 97+
 - 98 (DK)
 - 99 (Refused)

63. How did you initially contact the IRS about this issue? Was it **(read list)**?
[DISPLAY ISSUE FROM Q61/RANDOM SELECTION]

- 1 By calling the Toll-Free phone line
- 2 By visiting an IRS office (Taxpayer Assistance Center)
- 3 By sending regular mail to the IRS
- 4 By sending email to the IRS
- 5 By visiting the IRS website
- 6 or, some other way
- 7 (DK)
- 8 (Refused)

64 How did you contact the IRS the second time about this same issue?

[DISPLAY ISSUE FROM Q61/RANDOM SELECTION]

- 1 By calling the Toll-Free phone line
- 2 By visiting an IRS office (Taxpayer Assistance Center)
- 3 By sending regular mail to the IRS
- 4 By sending email to the IRS
- 5 By visiting the IRS website
- 6 or, some other way
- 7 (DK)
- 8 (Refused)

65. Did you get different answers from the IRS to the same question?

[DISPLAY ISSUE FROM Q61/RANDOM SELECTION]

- 1 Yes
- 2 No
- 3 (DK)
- 4 (Refused)

66. Was your issue **(read list)**?

[DISPLAY ISSUE FROM Q61/RANDOM SELECTION]

- 1 Completely resolved
- 2 Partly resolved
- 3 Not resolved at all
- 4 (DK)
- 5 (Refused)

IX. OVERALL SATISFACTION: ALL RESPONDENTS

67. Now, thinking about all of the times you've contacted the IRS in the past two years about the same issue, please rate your overall satisfaction with the guidance, help, or assistance you received from the IRS on a scale of one-to-five, where 1 is very dissatisfied and 5 is very satisfied.

5 Very satisfied.....1 Very dissatisfied 6 (DK) 7 (Refused)

67a. Please tell us what you believe the IRS could do to improve their guidance, help, or assistance. **(Open ended)**

68a **(Spanish-only)** On a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied, how satisfied are you overall with the Spanish-language assistance you received from the IRS?

5 Very satisfied.....1 Very dissatisfied 6 (DK) 7 (Refused)

68b. **(Ask All)** Now I have a question for you about your **overall** tax experience. Take all factors we have talked about, please rate your **OVERALL** satisfaction with filing your 2006 taxes on a scale of one-to-five where 1 is very dissatisfied and 5 is very satisfied.

5 Very satisfied.....1 Very dissatisfied 6 (DK) 7 (Refused)

69. What could the IRS have done to improve your experience with your 2006 taxes? **(Open-ended)**

1 Gave response **RECORD RESPONSE, THEN GO TO DEMOGRAPHICS**
2 No suggestions for improvement **(Ask Q69a)**

Q69a Is everything okay or you just don't know?

1 Everything is okay/IRS is doing okay now
2 (DK)
3 (Refused)

IX. DEMOGRAPHICS: ALL RESPONDENTS

I have a few demographic questions for classification purposes only.

D1. Do you use a computer at home?

- 1 Yes
- 2 No
- 3 (DK)
- 4 (Refused)

D2. Do you have Internet access . . . (**READ LIST**)

- 1 At home,
- 2 At work,
- 3 Both home and work
- 4 Or do you not have Internet access?
- 5 (DK)
- 6 (Refused)

D3. Not including cell phones, lines only used for business, a fax machine, or modem, how many different phone NUMBERS do you have coming into your household?

- 1 One
- 2 Two
- 3 Three
- 4 Four
- 5 Five or more
- 6 (DK)
- 7 (Refused)

D4. What is your age? (**code actual age**)

- _____ years
- 97 97+
 - 98 (DK)
 - 99 (Refused)

D5. What is the highest level of education you have completed?

- 1 Grade school
- 2 Some High School
- 3 High School Diploma/GED
- 4 Some College
- 5 College Degree (Associate's or Bachelor's Degree)
- 6 Graduate Study (Master's or Doctoral Degree)
- 7 (Refused)

D6. Do you have any of the following disabilities? **(Read list and enter all that apply)**

- 1 A sensory disability like seeing or hearing
- 2 A physical disability, besides seeing or hearing
- 3 Or a mental disability
- 4 (VOL) Has NO disabilities
- 5 (Refused)

D6a. **(If at least one of the disabilities mentioned)** Does your disability prevent you from going outside from your home?

- 1 Yes
- 2 No

D7. What is your employment status?

- 1 Work full-time (40 hrs or more)
- 3 Work part-time
- 4 Retired
- 5 Student
- 6 Unemployed
- 7 (Refused)

D8. Did you report having any dependents on your 2006 tax return?

- 1 Yes
- 2 No

D9. What was the total income you reported on your 2006 tax return? Was it . . . **[READ LIST]**

- 1 Less than 20,000
- 2 \$20,000 to less than \$38,000
- 3 \$38,000 to less than \$50,000
- 4 \$50,000 to less than \$75,000
- 5 \$75,000 to less than \$100,000
- 6 \$100,000 or more
- 7 (DK)
- 8 (Refused)

D10. **(Spanish-speakers only)** What is your country of origin?

- 1 Argentina
- 2 Cuba
- 3 Dominican Republic
- 4 Ecuador
- 5 El Salvador
- 6 Guatemala
- 7 Honduras
- 8 Mexico
- 9 Nicaragua

- 10 Puerto Rico
- 11 Spain
- 12 United States
- 13 Venezuela
- 14 Other (Please specify)
- 15 (DK)
- 16 (Refused)

D11. Gender:(Code only, Do not ask)

- 1 Male
- 2 Female

Again, this is _____, with SRBI. I would like to thank you for your time.

(Read address only if taxpayer requests)

Paperwork Reduction Act (PRA) Statement:

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 1545-1349. Also, 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, (Would you like to have the address?) Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224.