

**AMERICAN CUSTOMER SATISFACTION INDEX
OPERA****Treasury Department: Internal Revenue Service**

Hello, I'm _____ with Market Strategies, a market research firm, calling on behalf of CFI Group. We would like to ask you about your experiences with the services you received from the Internal Revenue Service. The purpose of the research is to help the IRS improve its services to consumers like you. Your name will be confidential, and I will ask you only about products and services you have recently purchased and used. Your participation is voluntary and poses no foreseeable risk to you. You may stop at any time or skip any question you do not wish to answer. Your opinions are important because you have been chosen randomly to represent consumers across the United States and your responses will be added to a growing IRS database of evaluations of customer satisfaction to improve the products and services provided to you, the consumer. This interview will take 8-10 minutes and is authorized by Office of Management and Budget Control No. 1505-0191.

QA. May I speak to the person, or one of the persons, who has the most interaction with the IRS concerning the filing of your IRS income tax return?

- 1 Yes, person available
 - 2 Yes, but not available now (Schedule callback)
 - 3 No, you cannot speak to the person
 - 4 Do not interact with the IRS
- DK
REF

{IF QA=3-4 OR DK OR REF, GO TO TERMINATE SCREEN; OTHERWISE CONTINUE}

(If person is available, reread intro if necessary and go to intro before Q1. If person is not available, schedule callback)

QX. Contact name

[RECORD CONTACT NAME]
[RECORD PHONE NUMBER]

PROG. NOTE: TERMINATE SCREEN

Those are all of the questions I have for you. Thank you for your interest in this project.

QB. Did you file your 2006 income tax, either yourself or through a paid practitioner?

- 1 Yes
- 2 No
- DK
- REF

{IF QB=2 OR DK OR REF, GO TO TERMINATE SCREEN; OTHERWISE CONTINUE}

QC. Did you file by paper form or did you file electronically?

- 1 Paper
- 2 Electronically
- DK
- REF

{IF QC= DK OR REF, GO TO TERMINATE SCREEN; OTHERWISE CONTINUE}

S1. With your 2006 tax return you filed this year, did you include a Schedule C (for any individual business/sole proprietor income) or Schedule F (for any individual farm income)? (*Business income or farm income does not include any income from a corporation or partnership*)

- 1 Yes, Schedule C
 - 2 Yes, Schedule F
 - 3 Yes, Both Schedule C and F
 - 4 No
 - DK
 - REF
-

P1. To begin, which of the following forms did you use when filing your 2006 tax return to the Internal Revenue Service? (*READ CODES 1-3; ACCEPT ONE MENTION*)

- 1 1040EZ (short form)
- 2 1040 (long form)
- 3 1040A
- DK
- REF

P2. Did you use a paid practitioner such as an income tax preparation service, an accountant or an attorney?

- 1 Yes
- 2 No
- DK
- REF

{IF P2 =2, DK OR REF, ASK P3; OTHERWISE GO TO INTRO BEFORE Q1}

P3. Did you use a computer software program for preparing your income tax return?

- 1 Yes
- 2 No
- DK
- REF

Now, I am going to ask you some questions about the filing of your 2006 income tax return to the Internal Revenue Service (IRS). These questions apply whether you did this filing yourself or through a practitioner such as a tax preparation service, an accountant or an attorney...

Q1. Before you filed your 2006 income tax, you probably knew something about the IRS process for filing tax returns. Now think back and remember your expectations of the overall quality of the IRS filing process. Please give me a rating on a 10 point scale on which "1" means your expectations were "not very high" and "10" means your expectations were "very high."

How would you rate your expectations of the overall quality of the IRS tax filing process?

- [RECORD NUMBER 1-10]
- DK
- REF

Now, let's think about getting information on filing...

Q2. Was information on income tax filing difficult or easy to get? Again, we will use a 10 point scale on which "1" means "very difficult to get" and "10" means "very easy to get." How difficult or easy was it to get information on filing?

- [RECORD NUMBER 1-10]
- DK
- REF

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- Q3. Was the information clear and understandable? Using a 10-point scale on which “1” means “not very clear and understandable” and “10” means “very clear and understandable,” how clear and understandable was the information on filing?

[RECORD NUMBER 1-10]

DK

REF

And next, consider the filing process...

- Q4. How difficult or easy was the filing process? Using a 10-point scale on which “1” means “very difficult” and “10” means “very easy,” how difficult or easy was the filing process?

[RECORD NUMBER 1-10]

DK

REF

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- Q5. Now think about the cost to prepare your income tax—the cost in time or money or both. On a 10-point scale on which “1” means “the cost in time and/or money is very high” and “10” means, “the cost in time and/or money is very low,” give me your rating of the time and/or cost to prepare your income tax for filing.

[RECORD NUMBER 1-10]

DK

REF

And thinking about getting help from the IRS...

- Q6. How courteous were IRS personnel with whom you had contact about filing? Using a 10-point scale on which “1” means “not at all courteous” and “10” means “very courteous,” how courteous were IRS personnel?

[RECORD NUMBER 1-10]

11 Did not have contact with IRS

DK

REF

{IF Q6 = 1-10, DK OR REF, ASK Q7; OTHERWISE GO TO Q10}

- Q7. How professional were personnel in terms of being helpful, responsive, and knowledgeable? Using a 10-point scale on which “1” means “not at all professional” and “10” means “very professional,” how professional were IRS personnel?

[RECORD NUMBER 1-10]

DK

REF

- Q8. Think about how timely responses are from the IRS. Using a 10-point scale on which "1" means "not at all timely" and "10" means "very timely," how timely are responses to information requests from the IRS?

[RECORD NUMBER 1-10]

DK

REF

- Q10. Please consider all your experiences in the past two years with the Internal Revenue Service filing process. Using a 10-point scale, on which "1" means "not very high" and "10" means "very high," how would you rate the **overall quality** of the IRS filing process?

[RECORD NUMBER 1-10]

DK

REF

Satisfaction includes many things. Let's move on and talk about your overall satisfaction with the IRS filing process.

- Q11. First, please consider all your experiences to date with the IRS tax filing process. Using a 10 point scale on which "1" means "very dissatisfied" and 10 means "very satisfied," how **satisfied** are you with the IRS tax filing process?

[RECORD NUMBER 1-10]

DK

REF

- Q12. Considering all of your expectations, to what extent has the IRS tax filing process fallen short of your expectations or exceeded your expectations? Using a 10-point scale on which "1" now means "falls short of your expectations" and "10" means "exceeds your expectations," to what extent has the IRS tax filing process fallen short of or exceeded your expectations?

[RECORD NUMBER 1-10]

DK

REF

- Q13. Forget the IRS for a moment. Now, I want you to imagine an ideal federal tax filing process. (PAUSE) How well do you think the IRS process compares with that ideal process? Please use a 10-point scale on which "1" means "not very close to the ideal," and "10" means "very close to the ideal."

[RECORD NUMBER 1-10]

DK

REF

Next, I want you to think about any communication you may have had with the IRS over the past two years regarding complaints about your experience with the filing of your tax return...

- Q14. Have you complained to the IRS within the past two years about filing your tax return?

1 Yes

2 No

DK

REF

{IF Q14 = 1, ASK Q14C-Q14D; OTHERWISE GO TO Q15A}

- Q14C. How well, or poorly, was your most recent complaint handled? Using a 10-point scale on which "1" means "handled very poorly" and "10" means "handled very well," how would you rate the handling of your complaint?

[RECORD NUMBER 1-10]

DK

REF

- Q14D. How difficult or easy was it to make your most recent complaint? Using a 10-point scale on which "1" means "very difficult" and "10" means "very easy," how difficult or easy was it to make a complaint?

[RECORD NUMBER 1-10]

DK

REF

- Q15A. In view of your most recent experience with the IRS, do you think that the tax filing process is fair? Using a 10-point scale on which "1" means "not at all fair" and "10" means "very fair," how fair is the tax filing process?

[RECORD NUMBER 1-10]
DK
REF

- Q15B. Do you think the Internal Revenue Service, the IRS, treats all taxpayers equally? Using a 10-point scale on which “1” means “taxpayers are treated very unequally” and “10” means “taxpayers are treated very equally,” how equally are taxpayers treated?

[RECORD NUMBER 1-10]
DK
REF

- Q16. Do you think the IRS tax filing process encourages taxpayers to cheat on their income taxes or does it encourage them to be honest? Using a 10-point scale on which “1” means “the tax filing process encourages taxpayers to cheat” and “10” means, “the tax filing process encourages taxpayers to be honest,” do you think the tax filing process encourages cheating or honesty?

[RECORD NUMBER 1-10]
DK
REF
