

**AMERICAN CUSTOMER SATISFACTION INDEX  
OPERA - Test of All Individual Tax Filers Score**

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 any products and services you received from the Internal Revenue Service. The purpose of the research is to help the IRS improve its product and services to taxpayers like you. Your opinions are important because you have been chosen at random to represent taxpayers across the United States and your responses will be used to evaluate the satisfaction with products and services provided by the IRS to you, the taxpayer. Your name will be kept confidential, and I will ask you only about products and services you have recently used or received. Your participation is voluntary. Information from individual responses to this survey will be combined, and reported only at a group level. You may stop at any time or skip any question you do not wish to answer. 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 2007 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

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{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]

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PROG. NOTE: TERMINATE SCREEN

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

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QB. Did you file your 2007 income tax form, 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

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REF

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

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P1. To begin, which of the following forms did you use when filing your 2007 income tax return with the Internal Revenue Service? (READ CODES 1-3; ACCEPT ONE MENTION)

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

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P2. Did you file your 2007 taxes using a paid or volunteer practitioner, tax software (such as Tax Cut or TurboTax), online tax preparation service (such as a free- or e-file company listed on the IRS website), or did you prepare your returns on paper?

- 1 Tax preparer (paid)
- 2 Tax preparer (volunteer)
- 3 Tax software
- 4 Online tax preparation
- 5 Paper

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REF

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S1. With your 2007 income 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), or not? (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

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Now, I am going to ask you some questions about the filing of your 2007 income tax return with the 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 2007 income tax return, 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

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

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

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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]

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REF

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Q5. Now think about the cost to prepare your income tax return - 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  
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And thinking about getting help from the IRS...

Q6: Did you have any contact with IRS personnel about filing your income tax?

YES  
NO

(IF Q6=YES THEN ASK Q6A ELSE GO TO Q10)

Q6A. How did you contact IRS personnel (Select all that apply)?

1 By Phone, spoke with customer service representative  
2 By E-mail  
3 By Phone, did not speak with live customer service representative, only automated system

DK  
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Q7. 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]

DK  
REF

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Q8. 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

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Q9. 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

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Q10. Please consider all your experiences with the 2007 IRS 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 2007 IRS filing process?

[RECORD NUMBER 1-10]

DK  
REF

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Satisfaction includes many things. Let's move on and talk about your overall satisfaction with the 2007 IRS filing process.

Q11. First, please consider all your experiences with the 2007 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 2007 IRS tax filing process?

[RECORD NUMBER 1-10]

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REF

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Q12. Considering all of your expectations, to what extent has the 2007 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 2007 IRS tax filing process fallen short of or exceeded your expectations?

[RECORD NUMBER 1-10]

DK  
REF

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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 2007 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

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Next, I want you to think about any communication you may have had with the IRS regarding complaints about your experience with the filing of your 2007 tax return...

Q14A. Have you complained to the IRS about any issues involved in filing your 2007 tax return?

- 1 Yes
- 2 No
- DK
- REF

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

Q14B. 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

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Q14C. How difficult or easy was it to submit 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 submit a complaint?

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

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Q14D. Was your complaint about your 2007 tax return resolved to your satisfaction?

- 1 Yes
- 2 No
- DK
- REF
- [RECORD NUMBER 1-10]
- DK
- REF

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Q15. 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
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Q16. Do you think 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

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Q17. 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