

## I. INTRODUCTION

Thank you for your participation in the IRS Online Tax Information Tool research conducted at the end of 2009. Your thoughts and insights made important contributions to the IRS continuous efforts to improve its service to the public. We would like to ask for your assistance once again as we further explore the quality of information you expect and receive from the IRS.

You will not be required to give any personal financial information, nor will you be contacted by the IRS as a result of participating in the research. All responses are completely anonymous and will only be used for research purposes.

SQ1. Let's begin by thinking back to the 2009 tax season earlier this year. Which, if any, of the following questions did you seek information for while filing your 2009 tax returns? **[SELECT ALL THAT APPLY]**

1. How to file taxes/filing req.
2. Who you can claim on your return
3. Money paid/received/saved for education
4. Work related questions
5. Questions around retirement
6. Questions related to being a US citizen with foreign income paying taxes to another country
7. Questions around credits you may be able to take on your return
8. Questions around claiming various types of income, payments, awards
9. What you take as deductions/ expenses
10. Gains/Losses from investments/ property
11. Questions related to being a foreigner who lives or works in the US
12. Questions about spouses/ex-spouses debt
13. None of the above

**[IF SQ1=13 TERMINATE, OTHERWISE CONTINUE]**

## WEB SURVEY

## II. EVALUATION OF TLC CATEGORIES

We would like to walk through your research process for answering tax related questions. Let's begin with **[INSERT TLC CATEGORY SELECTED IN SQ1 WITH THE LOWEST INCIDENCE FOR RESPONDENT'S SEGMENT]**.

Q2\_1. Which, if any, of the following resources did you access **FIRST** to get this tax question answered or issue resolved?

1. IRS by phone
2. IRS.gov
3. IRS Tax Assistance Center (walk-in site)
4. IRS Kiosk (similar to an ATM)
5. A tax professional (such as a certified public accountant, tax attorney, financial planner, or tax preparer)



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**Questionnaire for IRS Online Tax Tool Cognitive and Psychological Quantitative Survey**

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6. A volunteer tax preparation walk-in site (such as those sponsored by the VITA program, or AARP)
7. A non-IRS online resource (i.e. a website(s) other than IRS.gov)
8. A non-IRS offline resource (such as a local library, friend or family member who is not a tax professional, or tax preparation software)
9. Other [SPECIFY]
10. Question was never resolved

The OMB number for this study is 1545-1432.

If you have any comments regarding this study, please write to:

Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224

Q3\_1. Why was this resource your **FIRST** choice for this tax question/issue?

[INSERT TEXT BOX]

Q4\_1. Using a scale of 0 to 9 where, 0 means “this resource did not answer my question at all” and 9 means “this resource completely answered my question” how well did this resource answer your tax question/issue?

	Did not answer question at all 0	1	2	3	4	5	6	7	8	Completely answered questions 9
How well did this resource answer your tax question?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

[IF Q4\_1 < 7 ASK Q4A\_1, OTHERWISE GO TO Q5\_1]

Q4A\_1. Thinking of the content you found important, what was missing from the information provided by this resource?

[INSERT TEXT BOX]

Q5\_1. And after reviewing the content from this **FIRST** resource, did you seek out additional information for this tax question from a second resource?

1. Yes
2. No

[IF Q5\_1=1 ASK Q2\_2-Q5\_2 FOR THE SECOND RESOURCE; IF Q5\_1=2 GO TO NEXT TLC]

Q2\_2. Which, if any, of the following resources did you access **NEXT** to get this tax question answered or issue resolved?

1. IRS by phone
2. IRS.gov
3. IRS Tax Assistance Center (walk-in site)
4. IRS Kiosk (similar to an ATM)
5. A tax professional (such as a certified public accountant, tax attorney, financial planner, or tax preparer)
6. A volunteer tax preparation walk-in site (such as those sponsored by the VITA program, or AARP)
7. A non-IRS online resource (i.e. a website(s) other than IRS.gov)
8. A non-IRS offline resource (such as a local library, friend or family member who is not a tax professional, or tax preparation software)
9. Other [SPECIFY]

10. Question was never resolved

Q3\_2. Why was this resource your **SECOND** choice for this tax question/issue?

[INSERT TEXT BOX]

Q4\_2. Using a scale of 0 to 9 where, 0 means “this resource did not answer my question at all” and 9 means “this resource completely answered my question” how well did this resource answer your tax question/issue?

	Did not answer question at all 0	1	2	3	4	5	6	7	8	Completely answered questions 9
How well did this resource answer your tax question?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

[IF Q4\_2 < 7 ASK Q4A\_2, OTHERWISE GO TO Q5\_2]

Q4A\_2. Thinking of the content you found important, what was missing from the information provided by this resource?

[INSERT TEXT BOX]

Q5\_2. And after reviewing the content from this **SECOND** resource, did you seek out additional information for this tax question from a third resource?

1. Yes
2. No

[IF Q5\_2=1 ASK Q2\_3-Q5\_3 FOR THE THIRD RESOURCE; IF Q5\_2=2 GO TO NEXT TLC]

Q2\_3. Which, if any, of the following resources did you access **NEXT** to get this tax question answered or issue resolved?

1. IRS by phone
2. IRS.gov
3. IRS Tax Assistance Center (walk-in site)
4. IRS Kiosk (similar to an ATM)
5. A tax professional (such as a certified public accountant, tax attorney, financial planner, or tax preparer)
6. A volunteer tax preparation walk-in site (such as those sponsored by the VITA program, or AARP)
7. A non-IRS online resource (i.e. a website(s) other than IRS.gov)
8. A non-IRS offline resource (such as a local library, friend or family member who is not a tax professional, or tax preparation software)
9. Other [SPECIFY]

10. Question was never resolved

Q3\_3. Why was this resource your **THIRD** choice for this tax question/issue?

[INSERT TEXT BOX]

Q4\_3. Using a scale of 0 to 9 where, 0 means “this resource did not answer my question at all” and 9 means “this resource completely answered my question” how well did this resource answer your tax question/issue?

	Did not answer question at all 0	1	2	3	4	5	6	7	8	Completely answered questions 9
How well did this resource answer your tax question?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

[IF Q4\_3 < 7 ASK Q4A\_3, OTHERWISE GO TO Q5\_3]

Q4A\_3. Thinking of the content you found important, what was missing from the information provided by this resource?

[INSERT TEXT BOX]

Q5\_3. And after reviewing the content from this **THIRD** resource, did you seek out additional information for this tax question from a fourth resource?

1. Yes
2. No

[IF Q5\_3=1 ASK Q2\_4-Q4\_4 FOR THE FOURTH RESOURCE; IF Q5\_3=2 GO TO NEXT TLC]

Q2\_4. Which, if any, of the following was your **FOURTH** resource for answering this tax question or resolving this issue?

1. IRS by phone
2. IRS.gov
3. IRS Tax Assistance Center (walk-in site)
4. IRS Kiosk (similar to an ATM)
5. A tax professional (such as a certified public accountant, tax attorney, financial planner, or tax preparer)
6. A volunteer tax preparation walk-in site (such as those sponsored by the VITA program, or AARP)
7. A non-IRS online resource (i.e. a website(s) other than IRS.gov)
8. A non-IRS offline resource (such as a local library, friend or family member who is not a tax professional, or tax preparation software)

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- 9. Other [SPECIFY]
- 10. Question was never resolved

Q3\_4. Why was this resource your **FOURTH** choice for this tax question/issue?

**[INSERT TEXT BOX]**

Q4\_4. Using a scale of 0 to 9 where, 0 means “this resource did not answer my question at all” and 9 means “this resource completely answered my question” how well did this resource answer your tax question/issue?

	Did not answer question at all 0	1	2	3	4	5	6	7	8	Completely answered questions 9
How well did this resource answer your tax question?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**[IF Q4\_4 < 7 ASK Q4A\_4, OTHERWISE GO TO NEXT TLC]**

Q4A\_4. Thinking of the content you found important, what was missing from the information provided by this resource?

**[INSERT TEXT BOX]**

Now consider this question: **[INSERT TLC CATEGORY WITH THE NEXT LOWEST INCIDENCE FOR RESPONDENT’S SEGMENT]**.

Q6\_1. Which, if any, of the following resources did you access **FIRST** to get this tax question answered or issue resolved?

- 1. IRS by phone
- 2. IRS.gov
- 3. IRS Tax Assistance Center (walk-in site)
- 4. IRS Kiosk (similar to an ATM)
- 5. A tax professional (such as a certified public accountant, tax attorney, financial planner, or tax preparer)
- 6. A volunteer tax preparation walk-in site (such as those sponsored by the VITA program, or AARP)
- 7. A non-IRS online resource (i.e. a website(s) other than IRS.gov)
- 8. A non-IRS offline resource (such as a local library, friend or family member who is not a tax professional, or tax preparation software)
- 9. Other [SPECIFY]
- 10. Question was never resolved

Q7\_1. Why was this resource your **FIRST** choice for this tax question/issue?

**[INSERT TEXT BOX]**

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Q8\_1. Using a scale of 0 to 9 where, 0 means “this resource did not answer my question at all” and 9 means “this resource completely answered my question” how well did this resource answer your tax question/issue?

	Did not answer question at all 0	1	2	3	4	5	6	7	8	Completely answered questions 9
How well did this resource answer your tax question?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**[IF Q8\_1 < 7 ASK Q8A\_1, OTHERWISE GO TO Q9\_1]**

Q8A\_1. Thinking of the content you found important, what was missing from the information provided by this resource?

**[INSERT TEXT BOX]**

Q9\_1. And after reviewing the content from this **FIRST** resource, did you seek out additional information for this tax question from a second resource?

- 3. Yes
- 4. No

**[IF Q9\_1=1 ASK Q6\_2-Q9\_2 FOR THE SECOND RESOURCE; IF Q9\_1=2 GO TO NEXT TLC]**

Q6\_2. Which, if any, of the following resources did you access **NEXT** to get this tax question answered or issue resolved?

- 1. IRS by phone
- 2. IRS.gov
- 3. IRS Tax Assistance Center (walk-in site)
- 4. IRS Kiosk (similar to an ATM)
- 5. A tax professional (such as a certified public accountant, tax attorney, financial planner, or tax preparer)
- 6. A volunteer tax preparation walk-in site (such as those sponsored by the VITA program, or AARP)
- 7. A non-IRS online resource (i.e. a website(s) other than IRS.gov)
- 8. A non-IRS offline resource (such as a local library, friend or family member who is not a tax professional, or tax preparation software)
- 9. Other [SPECIFY]
- 10. Question was never resolved

Q7\_2. Why was this resource your **SECOND** choice for this tax question/issue?

**[INSERT TEXT BOX]**

Q8\_2. Using a scale of 0 to 9 where, 0 means “this resource did not answer my question at all” and 9 means “this resource completely answered my question” how well did this resource answer your tax question/issue?

	Did not answer question at all 0	1	2	3	4	5	6	7	8	Completely answered questions 9
How well did this resource answer your tax question?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**[IF Q8\_2 < 7 ASK Q8A\_2, OTHERWISE GO TO Q9\_2]**

Q8A\_2. Thinking of the content you found important, what was missing from the information provided by this resource?

**[INSERT TEXT BOX]**

Q9\_2. And after reviewing the content from this **SECOND** resource, did you seek out additional information for this tax question from a third resource?

1. Yes
2. No

**[IF Q9\_2=1 ASK Q6\_3-Q9\_3 FOR THE THIRD RESOURCE; IF Q5\_2=2 GO TO NEXT TLC]**

Q6\_3. Which, if any, of the following resources did you access **NEXT** to get this tax question answered or issue resolved?

1. IRS by phone
2. IRS.gov
3. IRS Tax Assistance Center (walk-in site)
4. IRS Kiosk (similar to an ATM)
5. A tax professional (such as a certified public accountant, tax attorney, financial planner, or tax preparer)
6. A volunteer tax preparation walk-in site (such as those sponsored by the VITA program, or AARP)
7. A non-IRS online resource (i.e. a website(s) other than IRS.gov)
8. A non-IRS offline resource (such as a local library, friend or family member who is not a tax professional, or tax preparation software)
9. Other [SPECIFY]
10. Question was never resolved

Q7\_3. Why was this resource your **THIRD** choice for this tax question/issue?

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[INSERT TEXT BOX]

Q8\_3. Using a scale of 0 to 9 where, 0 means “this resource did not answer my question at all” and 9 means “this resource completely answered my question” how well did this resource answer your tax question/issue?

	Did not answer question at all 0	1	2	3	4	5	6	7	8	Completely answered questions 9
How well did this resource answer your tax question?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

[IF Q8\_3 < 7 ASK Q8A\_3, OTHERWISE GO TO Q9\_3]

Q8A\_3. Thinking of the content you found important, what was missing from the information provided by this resource?

[INSERT TEXT BOX]

Q9\_3. And after reviewing the content from this **THIRD** resource, did you seek out additional information for this tax question from a fourth resource?

1. Yes
2. No

[IF Q9\_3=1 ASK Q6\_4-Q8\_4A FOR THE FOURTH RESOURCE; IF Q9\_3=2 GO TO NEXT TLC]

Q6\_4. Which, if any, of the following was your **FOURTH** resource for answering this tax question or resolving this issue?

1. IRS by phone
2. IRS.gov
3. IRS Tax Assistance Center (walk-in site)
4. IRS Kiosk (similar to an ATM)
5. A tax professional (such as a certified public accountant, tax attorney, financial planner, or tax preparer)
6. A volunteer tax preparation walk-in site (such as those sponsored by the VITA program, or AARP)
7. A non-IRS online resource (i.e. a website(s) other than IRS.gov)
8. A non-IRS offline resource (such as a local library, friend or family member who is not a tax professional, or tax preparation software)
9. Other [SPECIFY]
10. Question was never resolved

Q7\_4. Why was this resource your **FOURTH** choice for this tax question/issue?

**[INSERT TEXT BOX]**

Q8\_4. Using a scale of 0 to 9 where, 0 means “this resource did not answer my question at all” and 9 means “this resource completely answered my question” how well did this resource answer your tax question/issue?

	Did not answer question at all 0	1	2	3	4	5	6	7	8	Completely answered questions 9
How well did this resource answer your tax question?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**[IF Q8\_4 < 7 ASK Q8A\_4, OTHERWISE GO TO NEXT TLC]**

Q8A\_4. Thinking of the content you found important, what was missing from the information provided by this resource?

**[INSERT TEXT BOX]**

Let’s review your process for one last question that you researched during your 2009 tax filing process. Consider this question: **[INSERT TLC CATEGORY WITH THE NEXT LOWEST INCIDENCE FOR RESPONDENT’S SEGMENT]**.

Q10\_1. Which, if any, of the following resources did you access **FIRST** to get this tax question answered or issue resolved?

1. IRS by phone
2. IRS.gov
3. IRS Tax Assistance Center (walk-in site)
4. IRS Kiosk (similar to an ATM)
5. A tax professional (such as a certified public accountant, tax attorney, financial planner, or tax preparer)
6. A volunteer tax preparation walk-in site (such as those sponsored by the VITA program, or AARP)
7. A non-IRS online resource (i.e. a website(s) other than IRS.gov)
8. A non-IRS offline resource (such as a local library, friend or family member who is not a tax professional, or tax preparation software)
9. Other [SPECIFY]
10. Question was never resolved

Q11\_1. Why was this resource your **FIRST** choice for this tax question/issue?

**[INSERT TEXT BOX]**

Q12\_1. Using a scale of 0 to 9 where, 0 means “this resource did not answer my question at all” and 9 means “this resource completely answered my question” how well did this resource answer your tax question/issue?

	Did not answer question at all 0	1	2	3	4	5	6	7	8	Completely answered questions 9
How well did this resource answer your tax question?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**[IF Q12\_1 < 7 ASK Q12A\_1, OTHERWISE GO TO Q13\_1]**

Q12A\_1. Thinking of the content you found important, what was missing from the information provided by this resource?

**[INSERT TEXT BOX]**

Q13\_1. And after reviewing the content from this **FIRST** resource, did you seek out additional information for this tax question from a second resource?

1. Yes
2. No

**[IF Q13\_1=1 ASK Q10\_2-Q13\_2 FOR THE SECOND RESOURCE; IF Q13\_1=2 GO TO NEXT TLC]**

Q10\_2. Which, if any, of the following resources did you access **NEXT** to get this tax question answered or issue resolved?

1. IRS by phone
2. IRS.gov
3. IRS Tax Assistance Center (walk-in site)
4. IRS Kiosk (similar to an ATM)
5. A tax professional (such as a certified public accountant, tax attorney, financial planner, or tax preparer)
6. A volunteer tax preparation walk-in site (such as those sponsored by the VITA program, or AARP)
7. A non-IRS online resource (i.e. a website(s) other than IRS.gov)
8. A non-IRS offline resource (such as a local library, friend or family member who is not a tax professional, or tax preparation software)
9. Other [SPECIFY]
10. Question was never resolved

Q11\_2. Why was this resource your **SECOND** choice for this tax question/issue?

**[INSERT TEXT BOX]**

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Q12\_2. Using a scale of 0 to 9 where, 0 means “this resource did not answer my question at all” and 9 means “this resource completely answered my question” how well did this resource answer your tax question/issue?

	Did not answer question at all 0	1	2	3	4	5	6	7	8	Completely answered questions 9
How well did this resource answer your tax question?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**[IF Q12\_2 < 7 ASK Q12A\_2, OTHERWISE GO TO Q13\_2]**

Q12A\_2. Thinking of the content you found important, what was missing from the information provided by this resource?

**[INSERT TEXT BOX]**

Q13\_2. And after reviewing the content from this **SECOND** resource, did you seek out additional information for this tax question from a third resource?

1. Yes
2. No

**[IF Q13\_2=1 ASK Q10\_3-Q13\_3 FOR THE THIRD RESOURCE; IF Q13\_2=2 GO TO NEXT TLC]**

Q10\_3. Which, if any, of the following resources did you access **NEXT** to get this tax question answered or issue resolved?

1. IRS by phone
2. IRS.gov
3. IRS Tax Assistance Center (walk-in site)
4. IRS Kiosk (similar to an ATM)
5. A tax professional (such as a certified public accountant, tax attorney, financial planner, or tax preparer)
6. A volunteer tax preparation walk-in site (such as those sponsored by the VITA program, or AARP)
7. A non-IRS online resource (i.e. a website(s) other than IRS.gov)
8. A non-IRS offline resource (such as a local library, friend or family member who is not a tax professional, or tax preparation software)
9. Other [SPECIFY]
10. Question was never resolved

Q11\_3. Why was this resource your **THIRD** choice for this tax question/issue?

**[INSERT TEXT BOX]**

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Q12\_3. Using a scale of 0 to 9 where, 0 means “this resource did not answer my question at all” and 9 means “this resource completely answered my question” how well did this resource answer your tax question/issue?

	Did not answer question at all 0	1	2	3	4	5	6	7	8	Completely answered questions 9
How well did this resource answer your tax question?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**[IF Q12\_3 < 7 ASK Q12A\_3, OTHERWISE GO TO Q13\_3]**

Q12A\_3. Thinking of the content you found important, what was missing from the information provided by this resource?

**[INSERT TEXT BOX]**

Q13\_3. And after reviewing the content from this **THIRD** resource, did you seek out additional information for this tax question from a fourth resource?

1. Yes
2. No

**[IF Q13\_3=1 ASK Q10\_4-Q12\_4A FOR THE FOURTH RESOURCE; IF Q13\_3=2 GO TO NEXT TLC]**

Q10\_4. Which, if any, of the following was your **FOURTH** resource for answering this tax question or resolving this issue?

1. IRS by phone
2. IRS.gov
3. IRS Tax Assistance Center (walk-in site)
4. IRS Kiosk (similar to an ATM)
5. A tax professional (such as a certified public accountant, tax attorney, financial planner, or tax preparer)
6. A volunteer tax preparation walk-in site (such as those sponsored by the VITA program, or AARP)
7. A non-IRS online resource (i.e. a website(s) other than IRS.gov)
8. A non-IRS offline resource (such as a local library, friend or family member who is not a tax professional, or tax preparation software)
9. Other [SPECIFY]
10. Question was never resolved

Q11\_4. Why was this resource your **FOURTH** choice for this tax question/issue?

[INSERT TEXT BOX]

Q12\_4. Using a scale of 0 to 9 where, 0 means “this resource did not answer my question at all” and 9 means “this resource completely answered my question” how well did this resource answer your tax question/issue?

	Did not answer question at all 0	1	2	3	4	5	6	7	8	Completely answered questions 9
How well did this resource answer your tax question?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

[IF Q12\_4 < 7 ASK Q12A\_4, OTHERWISE GO TO NEXT TLC]

Q12A\_4. Thinking of the content you found important, what was missing from the information provided by this resource?

[INSERT TEXT BOX]

**[ALL RESPONDENTS SHOULD EVALUATE THREE TLC QUESTIONS; TAKE RESPONDENT THROUGH THE NEXT TLC BASED ON LOWEST INCIDENCE CATEGORY FOR RESPONDENT’S SEGMENT; IF RESPONDENT HAS LESS THAN THREE TLCS SELECTED IN QS1 ASK Q14; IF RESPONDENT HAS COMPLETED THREE TLCS ASK Q21]**

Q14. Thinking about the **2010 tax season**, which, if any, of the following questions do you **most likely anticipate** seeking assistance with while preparing your 2010 tax returns?  
**[SELECT ALL THAT APPLY]**

**[PROGRAMMER’S NOTE: DELETE ALL RESPONSES SELECTED IN Q1]**

1. How to file taxes/filing req.
2. Who you can claim on your return
3. Money paid/received/saved for education
4. Work related questions
5. Questions around retirement
6. Questions related to being a US citizen with foreign income paying taxes to another country
7. Questions around credits you may be able to take on your return
8. Questions around claiming various types of income, payments, awards
9. What you take as deductions/ expenses
10. Gains/Losses from investments/ property
11. Questions related to being a foreigner who lives or works in the US
12. Questions about spouses/ex-spouses debt
13. None of the above

**[IF MULTIPLE RESPONSES SELECTED IN Q14, SELECT LOWEST INCIDENCE TLC FOR THE RESPONDENT'S SEGMENT AND PROVIDE APPROPRIATE SERIES BELOW (SECOND AND/OR THIRD TLC); IF Q14=13 ASK Q21]**

Now think about the research process you will most likely use to answer this question: **[INSERT TLC CATEGORY WITH THE NEXT LOWEST INCIDENCE FOR RESPONDENT'S SEGMENT]**.

Q15\_1. Which, if any, of the following resources would you access **FIRST** to get this tax question answered or issue resolved?

1. IRS by phone
2. IRS.gov
3. IRS Tax Assistance Center (walk-in site)
4. IRS Kiosk (similar to an ATM)
5. A tax professional (such as a certified public accountant, tax attorney, financial planner, or tax preparer)
6. A volunteer tax preparation walk-in site (such as those sponsored by the VITA program, or AARP)
7. A non-IRS online resource (i.e. a website(s) other than IRS.gov)
8. A non-IRS offline resource (such as a local library, friend or family member who is not a tax professional, or tax preparation software)
9. Other [SPECIFY]

Q16\_1. Why would this resource be your **FIRST** choice for this tax question/issue?

**[INSERT TEXT BOX]**

Q17\_1. And after reviewing the content from this **FIRST** resource, would you seek out additional information for this tax question from a second resource?

1. Yes
2. No

**[IF Q17\_1=1 ASK Q15\_2-Q17\_2 FOR THE SECOND RESOURCE; IF Q17\_1=2 GO TO NEXT TLC]**

Q15\_2. Which, if any, of the following resources would you access **NEXT** to get this tax question answered or issue resolved?

1. IRS by phone
2. IRS.gov
3. IRS Tax Assistance Center (walk-in site)
4. IRS Kiosk (similar to an ATM)
5. A tax professional (such as a certified public accountant, tax attorney, financial planner, or tax preparer)
6. A volunteer tax preparation walk-in site (such as those sponsored by the VITA program, or AARP)
7. A non-IRS online resource (i.e. a website(s) other than IRS.gov)
8. A non-IRS offline resource (such as a local library, friend or family member who is not a tax professional, or tax preparation software)
9. Other [SPECIFY]

Q16\_2. Why would this resource be your **SECOND** choice for this tax question/issue?

**[INSERT TEXT BOX]**

Q17\_2. And after reviewing the content from this **SECOND** resource, would you seek out additional information for this tax question from a third resource?

1. Yes
2. No

**[IF Q17\_2=1 ASK Q15\_3-Q17\_3 FOR THE THIRD RESOURCE; IF Q17\_2=2 GO TO NEXT TLC]**

Q15\_3. Which, if any, of the following resources would you access **NEXT** to get this tax question answered or issue resolved?

1. IRS by phone
2. IRS.gov
3. IRS Tax Assistance Center (walk-in site)
4. IRS Kiosk (similar to an ATM)
5. A tax professional (such as a certified public accountant, tax attorney, financial planner, or tax preparer)
6. A volunteer tax preparation walk-in site (such as those sponsored by the VITA program, or AARP)
7. A non-IRS online resource (i.e. a website(s) other than IRS.gov)
8. A non-IRS offline resource (such as a local library, friend or family member who is not a tax professional, or tax preparation software)
9. Other [SPECIFY]



Q16\_3. Why would this resource be your **THIRD** choice for this tax question/issue?

**[INSERT TEXT BOX]**

Q17\_3. And after reviewing the content from this **THIRD** resource, would you seek out additional information for this tax question from a fourth resource?

1. Yes
2. No

**[IF Q17\_3=1 ASK Q15\_4-Q16\_4 FOR THE FOURTH RESOURCE; IF Q17\_3=2 ASK Q21]**

Q15\_4. Which, if any, of the following would be your **FOURTH** resource for answering this tax question or resolving this issue?

1. IRS by phone
2. IRS.gov
3. IRS Tax Assistance Center (walk-in site)
4. IRS Kiosk (similar to an ATM)
5. A tax professional (such as a certified public accountant, tax attorney, financial planner, or tax preparer)
6. A volunteer tax preparation walk-in site (such as those sponsored by the VITA program, or AARP)
7. A non-IRS online resource (i.e. a website(s) other than IRS.gov)
8. A non-IRS offline resource (such as a local library, friend or family member who is not a tax professional, or tax preparation software)
9. Other [SPECIFY]

Q16\_4. Why would this resource be your **FOURTH** choice for this tax question/issue?

**[INSERT TEXT BOX]**

Let's review your research process for one last question you anticipate asking during your 2010 tax filing process. Consider this question: **[INSERT TLC CATEGORY WITH THE NEXT LOWEST INCIDENCE FOR RESPONDENT'S SEGMENT]**.

Q18\_1. Which, if any, of the following resources would you access **FIRST** to get this tax question answered or issue resolved?

1. IRS by phone
2. IRS.gov
3. IRS Tax Assistance Center (walk-in site)
4. IRS Kiosk (similar to an ATM)
5. A tax professional (such as a certified public accountant, tax attorney, financial planner, or tax preparer)
6. A volunteer tax preparation walk-in site (such as those sponsored by the VITA program, or AARP)
7. A non-IRS online resource (i.e. a website(s) other than IRS.gov)
8. A non-IRS offline resource (such as a local library, friend or family member who is not a tax professional, or tax preparation software)
9. Other [SPECIFY]

Q19\_1. Why would this resource be your **FIRST** choice for this tax question/issue?

**[INSERT TEXT BOX]**

Q20\_1. And after reviewing the content from this **FIRST** resource, would you seek out additional information for this tax question from a second resource?

1. Yes
2. No

**[IF Q20\_1=1 ASK Q18\_2-Q20\_2 FOR THE SECOND RESOURCE; IF Q20\_1=2 ASK Q21]**

Q18\_2. Which, if any, of the following resources would you access **NEXT** to get this tax question answered or issue resolved?

1. IRS by phone
2. IRS.gov
3. IRS Tax Assistance Center (walk-in site)
4. IRS Kiosk (similar to an ATM)
5. A tax professional (such as a certified public accountant, tax attorney, financial planner, or tax preparer)
6. A volunteer tax preparation walk-in site (such as those sponsored by the VITA program, or AARP)
7. A non-IRS online resource (i.e. a website(s) other than IRS.gov)
8. A non-IRS offline resource (such as a local library, friend or family member who is not a tax professional, or tax preparation software)
9. Other [SPECIFY]

Q19\_2. Why would this resource be your **SECOND** choice for this tax question/issue?

**[INSERT TEXT BOX]**

Q20\_2. And after reviewing the content from this **SECOND** resource, would you seek out additional information for this tax question from a third resource?

1. Yes
2. No

**[IF Q20\_2=1 ASK Q18\_3-Q20\_3 FOR THE THIRD RESOURCE; IF Q20\_2=2 ASK Q21]**

Q18\_3. Which, if any, of the following resources would you access **NEXT** to get this tax question answered or issue resolved?

1. IRS by phone
2. IRS.gov
3. IRS Tax Assistance Center (walk-in site)
4. IRS Kiosk (similar to an ATM)
5. A tax professional (such as a certified public accountant, tax attorney, financial planner, or tax preparer)
6. A volunteer tax preparation walk-in site (such as those sponsored by the VITA program, or AARP)
7. A non-IRS online resource (i.e. a website(s) other than IRS.gov)
8. A non-IRS offline resource (such as a local library, friend or family member who is not a tax professional, or tax preparation software)
9. Other [SPECIFY]

Q19\_3. Why would this resource be your **THIRD** choice for this tax question/issue?

**[INSERT TEXT BOX]**

Q20\_3. And after reviewing the content from this **THIRD** resource, would you seek out additional information for this tax question from a fourth resource?

1. Yes
2. No

**[IF Q20\_3=1 ASK Q18\_4-Q19\_4 FOR THE FOURTH RESOURCE; IF Q20\_3=2 ASK Q21]**

Q18\_4. Which, if any, of the following would be your **FOURTH** resource for answering this tax question or resolving this issue?

1. IRS by phone
2. IRS.gov
3. IRS Tax Assistance Center (walk-in site)
4. IRS Kiosk (similar to an ATM)
5. A tax professional (such as a certified public accountant, tax attorney, financial planner, or tax preparer)
6. A volunteer tax preparation walk-in site (such as those sponsored by the VITA program, or AARP)
7. A non-IRS online resource (i.e. a website(s) other than IRS.gov)
8. A non-IRS offline resource (such as a local library, friend or family member who is not a tax professional, or tax preparation software)
9. Other [SPECIFY]

Q19\_4. Why would this resource be your **FOURTH** choice for this tax question/issue?

**[INSERT TEXT BOX]**

Q21. Did you visit IRS.Gov for help for your 2009 tax return any time after February 2010?

1. Yes
2. No

**[IF Q21=1 GO TO “RATING IRS.GOV” SECTION, OTHERWISE GO TO CONCLUSION]**

### **III. RATING OF IRS.GOV**

The next several questions are about your experience with IRS.gov.

#### **Customer Experience Index 2010**

Q21a. Thinking about your recent experience visiting IRS.gov, how easy was it to work with?

**[DISPLAY TO ALL: Please use a 1-5 scale where 1 means “very difficult” and 5 means “very easy.”]**

	Very Difficult 1	2	3	4	Very Easy 5
A. ...how easy was it to work with?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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Q21b. Thinking about your recent experience visiting IRS.gov, how effective was it at meeting your needs?

**[DISPLAY TO ALL:** Please use a 1-5 scale where 1 means “didn’t meet any of my needs” and 5 means “met all my needs.”]

	Didn't meet any of my needs 1	2	3	4	Met all my needs 5
B. ...how effective was it at meeting your needs?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q21c. Thinking about your recent experience visiting IRS.gov, how enjoyable was it?

**[DISPLAY TO ALL:** Please use a 1-5 scale where 1 means “not at all enjoyable” and 5 means “very enjoyable.”]

	Not at all enjoyable 1	2	3	4	Very enjoyable 5
C. ...how enjoyable was it?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**IRS.gov – Specifics**

Q22. To what extent do you disagree or agree with the following statements about your expectations *prior* to your most recent visit to IRS.gov?

**[DISPLAY TO ALL:** Please use a 0-9 scale where 0 means “strongly disagree” and 9 means “strongly agree.”]

[ROTATE]	Strongly disagree 0	1	2	3	4	5	6	7	8	Strongly agree 9
1. I assumed that getting my question answered or issue resolved by visiting IRS.gov would be very difficult.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. I assumed that getting my question answered or issue resolved by visiting IRS.gov would take very little time.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q23. Now I'd like to ask you to rate IRS.gov on a series of features and qualities you may have used or noticed during your **most recent** visit.

We'll use a 1-7 scale where 1 means "extremely dissatisfied" and 7 means "extremely satisfied." So thinking of that most recent IRS' customer service experience how satisfied were you...

- 1. [RECORD NUMBER 1-7]
- 999. Not applicable

[ROTATE A-P]	Extremely dissatisfied 1	2	3	4	5	6	Extremely satisfied 7
<b>Ease of Use</b>							
<b>How satisfied were you with...</b>							
A. ...the ease of finding what you were looking for	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. ...the look and feel of the information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Content</b>							
<b>How satisfied were you with...</b>							
C. ...the ease of being able to understand the information provided on the site	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
D. ...the accuracy of the search function in providing you with the content you were looking for	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
E. ...the breadth and depth of information available on the site	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
F. ...the ability to find information directly related to your question or issue	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Overall Resolution</b>							
<b>How satisfied were you with...</b>							
G. ...the total time you spent on the site before you found what you were looking for	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
H. ...the extent to which your visit to IRS.gov answered your question or resolved your issue	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I. ...the extent to which you had confidence in the information you obtained	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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Q24. To what extent do you disagree or agree with the following statements about your feelings **after** your most recent visit to IRS.gov? Please use a 0-9 scale where 0 means “strongly disagree” and 9 means “strongly agree.”

- 1. **[ENTER RESPONSE 0-9]**
- 999. Not applicable

ROTATE A-H	Strongly disagree 0	1	2	3	4	5	6	7	8	Strongly agree 9
A. I was completely confident that my question had been answered or my issue had been resolved.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. I felt that the IRS was a very trustworthy organization.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C. I was very cautious about the information provided by the IRS.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
D. I did the right thing by visiting IRS.gov.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
E. It required a great deal of effort on my part to get my question answered or my issue resolved.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
F. I felt the need to check the information I received from IRS.gov with a different <u>IRS</u> source (such as the IRS customer service phone line or an IRS Tax Assistance Center.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
G. I felt the need to check the information I received from IRS.gov with a <u>non-IRS</u> source (such as a tax professional, friend or family member, or tax preparation software.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
H. I clearly understood the action I needed to take after visiting IRS.gov.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**IRS.gov – Loyalty**

Q25a. How likely are you to consider going to IRS.gov to look for answers to future questions?

**[DISPLAY TO ALL:** Please use a 1-5 scale where 1 means “not at all likely” and 5 means “very likely.”]

	Not at all likely 1	2	3	4	Very likely 5
A. How likely are you to consider going to IRS.gov to look for answers to future questions?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q25b. How likely are you to recommend IRS.gov to a friend or colleague?

**[DISPLAY TO ALL:** Please use a 1-5 scale where 1 means “not at all likely” and 5 means “very likely.”]

	Not at all likely 1	2	3	4	Very likely 5
B. How likely are you to recommend IRS.gov to a friend or colleague?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**[CONCLUSION]** Those are all the questions we have for you today. Thank you for your participation in this survey.



## Attachment B: Tax Preparer Email Invitation to Participate

Below is an example of a typical survey invitation:

**Sender:** e-Rewards

**Subject:** Get Rewarded for Your Time - Study about (General topic to command interest without generating bias.)

**Body:** Based on your eRewards profile, you are invited to earn eRewards Currency for participating in a research survey. If you qualify and complete the survey:

Full reward amount: XX in eRewards Currency

Full survey length: approximately XX minutes

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