

SCREENER INTRODUCTION

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

- S1. We are an independent research organization working with the IRS to obtain feedback on customer satisfaction. We would like to invite you to take part in a brief survey about your satisfaction with some of the products and services it offers for tax return preparation. The interview should take no more than 15 minutes for most customers. Your identity and individual responses will be held confidential by Macro International. Any data provided to the IRS will be completely anonymous and all personally identifying information will be removed. Your participation is very important to help the IRS design products and services that meet the needs of taxpayers. May we continue?
- 01 Yes
 - 02 No Thank and terminate call

INDIVIDUAL TAXPAYER

In thinking of your experiences, concentrate on the products and services you use as an individual taxpayer only. Our first few questions are about how you file taxes.

- Q1. Have you filed a FEDERAL INCOME TAX RETURN for 2007? [Read list]
- 01 Yes. You or your spouse have filed a Federal tax return for 2007
 - 02 No. Do not have to file a Federal income tax return for 2007. Thank and terminate call
 - 03 No. Have not yet filed Federal income tax return for 2007. Thank and terminate call
 - 03 Not sure Thank and terminate call
- Q2. Would you say that you are the adult in your household who is most familiar with the preparation and filing of your federal income tax return for 2007? [Read list]
- 01 Yes, most familiar
 - 02 Equally familiar
 - 03 Neither "most familiar" nor "equally familiar" Thank and terminate call
- Q3. Are you familiar enough with your federal income tax return for 2007 to answer some questions about it?
- 01 Yes
 - 02 No Thank and terminate call
- Q4. Which of the following Federal tax forms did you use when you filed your 2007 tax return? Was it... ? [Read list. Select one.]
- 01 1040EZ Income Tax Return for Single Filers and Joint Filers with No Dependents Skip to Q6
 - 02 1040A US Individual Income Tax Return Skip to Q6
 - 03 1040 US Individual Tax Return
 - 04 Not Sure Skip to Q6
- Q5. Which of the following forms, if any, did you file with your Form 1040? [Read list. Select all that apply.]
- 01 Schedule A for itemized deductions
 - 02 Schedule B for interest and dividend income
 - 03 Schedule C for small business income
 - 04 Schedule D for capital gains and losses
 - 05 Schedule E for supplemental income
 - 06 Schedule F for farm income

Forms Distribution Survey

- 07 Other forms not listed
- 08 No forms other than 1040

Q6. Did you prepare your 2007 Federal income tax return yourself or did you use a paid preparer, like an accountant or tax service?

- 01 You (or other family member) prepared return
- 02 Used a paid preparer Skip to Q8
- 03 Other (SPECIFY)

Q7. How did you prepare your 2007 Federal income tax return? Was it ...

[Read list. Select one.]

- 01 By hand, using the IRS tax form
- 02 On the computer, using a computer program
- 03 Not sure

Q8. After your forms were completed, how did you file your most recent tax return?

Did you.....[Read list. Select one.]

- 01 I filed by regular mail
- 02 My tax preparer filed by regular mail
- 03 I filed electronically by computer
- 04 My tax preparer filed electronically by computer
- 05 Delivered in person
- 06 Not sure

Q9. Now I'm going to ask you a few questions about your experiences with the most current tax forms and instructions for Tax Year 2007. Please rate your satisfaction with each of the following items on a scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied.

- A. Knowing where to find tax forms and instructions
- B. The ease of determining which forms and instructions you needed
- C. The ease of finding answers in the publications
- D. Knowing what you needed to do to complete the forms
- E. The completeness of instructions
- F. The ease of understanding the instructions
- G. The ease of getting tax forms and instructions
- H. The ease of understanding tax forms

05 Very satisfied

04

03

02

01 Very dissatisfied

06 [Not applicable/Have not used/No experience]

07 [DK]

09 [Refused]

PUBLICATION EVALUATION

Now I'm going to ask you a few questions about tax publications. Again, please think about your use of tax publications as an individual taxpayer for your 2007 Federal tax return.

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Q10. Did you use any IRS publications in preparing your 2007 Federal tax return?

01 Yes

02 No

03 Not sure

Skip to Q22

Skip to Q22

Q11. Which of the following IRS publications have you used in preparing your 2007 Federal tax return? (Rotate. READ LIST. Select all that apply.)

A. Pub 17 Your Federal Income Tax

B. Pub 463 Travel, Entertainment, Gift and Car Expenses

C. Pub 501 Exemptions, Standard Deductions and Filing Instructions

D. Pub 502 Medical and Dental Expenses

E. Pub 505 Tax Withholding and Estimated Tax

F. Pub 523 Selling Your Home

G. Pub 525 Taxable and Nontaxable Income

H. Pub 535 Business Expenses

I. Pub 550 Investment Income and Expenses

J. Pub 553 Highlights of Tax Changes for 2007

K. Pub 590 Individual Retirement Arrangements (IRAs)

L. Pub 596 Earned Income Credit

M. Pub 946 How To Depreciate Property

N. Pub 970 Tax Benefits for Education

O. Something else (SPECIFY)

01 Used publication

02 Did not use

97 Used none of these

Skip to Q22

[Programmer:

- For each of the first two publications from list in Q11 with a 01 (Used publication) response, ask questions Q12 – Q20. Continue with Q21 after questions on second publication are complete.
- If only one publication receives a 01 response, skip to Q21 after the questions about the first publication with a 01 response.
- If Q11=97 (Used none of these), skip to Q22.]

Q12. Did you use (**Insert Publication from Q11**) when preparing or filing your 2007 income tax return?

01 Yes

02 No

If NO, continue to insert additional publications from Q11 with a 01 (Used publication) response until the maximum number of two publications are addressed. If NO and there are no further publications with a 01 response, skip to Q22.

Q13. How did you find out about this publication? (READ LIST. Select all that apply.)

01 Form 1040 or other schedules referred me to it

02 List of publications on IRS website

03 From doing taxes in previous years

04 From other tax guides

05 From my tax preparer

06 Word of mouth

07 Other (SPECIFY)

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Q14. On a scale from 1 to 5, with 1 being very difficult and 5 being very easy, how easy was it for you to obtain **(Insert Publication from Q11)**?

- 05 Very easy Skip to Q16
- 04 Skip to Q16
- 03 Skip to Q16
- 02
- 01 Very difficult
- 06 [Not applicable/Have not used/No experience] Skip to Q16
- 07 [DK] Skip to Q16
- 09 [Refused] Skip to Q16

Q15. What was difficult about obtaining this document?
(Record verbatim)

Q16. On a scale of 1 to 5 with 1 being very poor and 5 being very good, how would you rate the following aspects of **(Insert Publication from Q11)** document?

- A. Table of contents
- B. Important changes
- C. Index
- D. Worksheet
- E. Examples
- F. Flow charts
- G. Appendix
- H. Tax tables
- 05 Very Good
- 04
- 03
- 02
- 01 Very Poor
- 06 [Not applicable/Have not used/No experience]
- 07 [DK]
- 09 [Refused]

Q17. In thinking about your experience with the most recent version of **(Insert Publication from Q11)**, tell me whether you agree or disagree with the following statements on a scale of 1 to 5, where 1 is strongly disagree and 5 is strongly agree.

- A. The language was understandable
- B. The graphics and layout made it easy to follow
- C. The size of the print made it easy to read
- D. It was easy to find the information that I was looking for
- E. It was easy to go back and forth between the publication and the form
- F. The section headings were useful
- G. The publication was as clear as possible, given the tax law
- H. I feel confident in the calculations that I made
- 05 Strongly Agree
- 04
- 03
- 02
- 01 Strongly Disagree
- 06 [Not applicable/Have not used/No experience]

Forms Distribution Survey

07 [DK]
09 [Refused]

Q18. Taking all of these factors into account, on a scale of 1 to 5 where 1 means very dissatisfied and 5 means very satisfied, how would you rate your overall satisfaction with **(Insert Publication from Q11)** the last time you used it?

05 Very satisfied

04

03

(Return to Q12 if appropriate; otherwise skip to Q21)

02

Skip to Q20

01 Very dissatisfied

Skip to Q20

06 [Not applicable/Have not used/
No experience]

(Return to Q12 if appropriate; otherwise skip to Q21)

07 [DK]

(Return to Q12 if appropriate; otherwise skip to Q21)

09 [Refused]

(Return to Q12 if appropriate; otherwise skip to Q21)

Q19. What would you describe as the BEST features of this publication? Anything else?
(Record verbatim - Return to Q12 if appropriate; otherwise SKIP TO Q21)

Q20. How could this publication be improved? Anything else?
(Record verbatim - Return to Q12 if appropriate; otherwise continue to Q21)

Q21. Where did you get the publications you used for your 2007 Federal income tax return? If you obtained publications from different sources, please tell us all the sources. (Record verbatim)

Interviewer: use list as prompt if interviewee is unsure of possible sources.

- A. IRS office
- B. IRS website
- C. VITA or TCE site
- D. By calling the IRS to send it to me
- E. By e-mailing request to IRS
- F. Tax preparer/accountant
- G. Through the mail
- H. Tax preparation software or computer program
- I. Library
- J. Post office
- K. Other government office
- L. Other (SPECIFY)

WEBSITE AND ELECTRONIC FORMS EVALUATION

Now I'm going to ask you some questions about the IRS website.

Q22. Are you aware that the IRS has a website where you can obtain forms and publications?

01 Yes

02 No

Skip to Q33

Forms Distribution Survey

- Q23. Have you ever visited the IRS website (www.irs.gov)?
01 Yes
02 No Skip to Q33
- Q24. Approximately how many times did you access the IRS website during the most current tax season? Your best estimate is fine.
_____ TIMES (Record.)
- Q25. Did you use the IRS website in the past year for any of the following reasons? (Read list. Select all that apply.)
A. View a specific form
B. Download a specific form
C. View a specific publication
D. Download a specific publication
E. Get an answer to a tax question
F. See what changes had been made in tax laws
G. Find out how to get help with your taxes
H. Other (SPECIFY)
01 Yes
02 No
03 Not sure
- Q26. On a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied, how satisfied were you with the usability of the IRS website?
05 Very satisfied
04
03
02
01 Very dissatisfied
06 [Not applicable/Have not used/No experience]
07 [DK]
09 [Refused]
- Q27. Compared to other Federal government websites that you have seen, how would you rate the IRS website? (Read list)
05 One of the best
04 Above average
03 Average Skip to Q30
02 Below average Skip to Q29
01 One of the worst Skip to Q29
- Q28. What would you describe as the BEST features of this website? Anything else?
(Record verbatim - Skip to Q30)
- Q29. How could the IRS website be improved? Anything else?
(Record verbatim)
- Q30. On a scale of 1 to 5, where 1 means very dissatisfied and 5 means very satisfied, how would you rate your satisfaction with the following aspects of the IRS website? (READ LIST.).

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- A. The appearance of the website
 - B. The links offered on the home page
 - C. The ease of finding the information that you needed
 - D. The ease of downloading forms and instructions
- 05 Very satisfied Skip to Q32
04 Skip to Q32
03 Skip to Q32
02
01 Very dissatisfied
06 [Not applicable/Have not used/No experience] Skip to Q32
07 [DK] Skip to Q32
09 [Refused] Skip to Q32

Q31. Why were you dissatisfied with... (INSERT from Q30 A-D as appropriate)?
(Record verbatim. Repeat as necessary for all Q30 A-D responses rated 01 or 02.)

Q32. Taking all of these factors into account, on a scale of 1 to 5 where 1 means very dissatisfied and 5 means very satisfied, how would you rate your overall satisfaction with the IRS website?
05 Very satisfied
04
03
02
01 Very dissatisfied
06 [Not applicable/Have not used/No experience]
07 [DK]
09 [Refused]

ELECTRONIC DOCUMENTS

Q33. Have you ever completed or used the electronic version of any Federal tax form on the IRS website?

- 01 Yes
02 No Skip to Q35

Q34. Please tell me the electronic tax form you have completed or used. (Record verbatim)

Q35. Have you ever used the electronic version of any Federal tax publication on the IRS website?

- 01 Yes
02 No Skip to Q40

Q36. Please tell me the electronic publications you have used.(Record verbatim)

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Q37. When you used the electronic publication on-line at the IRS website, which of the following did you use? (READ LIST. Select all that apply)

- A. Table of contents
 - B. Important changes
 - C. Index at back
 - D. Worksheet
 - E. Tips
 - F. Examples
 - G. Flow charts
 - H. Appendix
 - I. Tax tables
 - J. Tax form
 - K. Instructions for a tax form
 - L. None of these
- 01 Used
02 Did not use
03 Not sure

Q38. What would you describe as the BEST features of the electronic publication?
Anything else?

(Record verbatim – ask for name of the form(s)/publication(s))

Q39. How could the electronic publication be improved? Anything else?

(Record verbatim– ask for name of the form(s)/publication(s))

MARKETING

Q40. On a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied, how satisfied are you that you know about changes which have occurred in tax forms that you needed to use for the 2007 tax filing season?

- 05 Very satisfied
- 04
- 03 AR
- 02
- 01 Very dissatisfied
- 06 [Not applicable/Have not used/No experience]
- 07 [DK]
- 09 [Refused]

Q41. On a scale of 1 to 5, how satisfied are you that you know about changes which have occurred in publications that you needed to use for the 2007 Tax Year?

- 05 Very satisfied
- 04
- 03
- 02
- 01 Very dissatisfied
- 06 [Not applicable/Have not used/No experience]
- 07 [DK]
- 09 [Refused]

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- Q42. On a scale of 1 to 5, how satisfied are you with getting information on tax law changes for the 2007 Tax Year?
- 05 Very satisfied
 - 04
 - 03
 - 02
 - 01 Very dissatisfied
 - 06 [Not applicable/Have not used/No experience]
 - 07 [DK]
 - 09 [Refused]
- Q43. How do you find out when tax forms and publications have changed?
(DO NOT READ. Select all that apply.)
- 01 IRS website
 - 02 IRS workshop
 - 03 Professional association
 - 04 Word of mouth
 - 05 Software programs
 - 06 TV, radio, or print advertisements
 - 07 Tax Preparer
 - 08 Other (Record)
 - 09 Not sure
 - 10 Refused
- Q44. On a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied, how satisfied are you with the way the IRS communicates changes in services to its customers?
- 05 Very satisfied
 - 04
 - 03
 - 02
 - 01 Very dissatisfied
 - 06 [Not applicable/Have not used/No experience]
 - 07 [DK]
 - 09 [Refused]

OVERALL RATING

- Q45. Overall, how would you rate the IRS on the **tax forms** that it develops, produces and distributes to taxpayers? Are you...? (Read list.)
- 05 Very satisfied
 - 04 Satisfied
 - 03 Somewhat satisfied
 - 02 Dissatisfied
 - 01 Very dissatisfied
 - 07 [DK]
 - 09 [Refused]
- Q46. Overall, how would you rate the IRS on the **instructions** that it develops, produces and distributes to taxpayers? Are you...? (Read list.)
- 05 Very satisfied
 - 04 Satisfied
 - 03 Somewhat satisfied
 - 02 Dissatisfied
 - 01 Very dissatisfied

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- 07 [DK]
- 09 [Refused]

Q47. Overall, how would you rate the IRS on the **publications** that it develops, produces and distributes to taxpayers? Are you...? (Read list.)

- 05 Very satisfied
- 04 Satisfied
- 03 Somewhat satisfied
- 02 Dissatisfied
- 01 Very dissatisfied
- 07 [DK]
- 09 [Refused]

NOTICE IMPROVEMENT SURVEY QUESTIONS

Q48. Have you received any written communication (Notice) from the IRS within the past two years?

- 01 Yes
- 02 No Skip to Q55
- 07 [DK] Skip to Q55
- 09 [Refused] Skip to Q55

Q49. Did you read the notice you received from the IRS?

- 01 Yes Skip to Q51
- 02 No

Q50. Can you tell me why you didn't read the notice you received from the IRS? (Do not read List, Select all that apply)

- 01 Gave to spouse/ spouse read
- 02 Took it to accountant/bookkeeper
- 03 Did not think it was important
- 04 Afraid to read it
- 05 Lost it
- 06 Other (Record)
- 07 Don't know

Q51. What was the general topic of the notice or reason the IRS sent you a notice? (Do not read List. Select all that apply)

- 01 Balance due- IRS said I owe money
- 02 Getting a refund- IRS said they owe me money
- 03 Education- tell me I might be able to claim something I did not
- 04 Error on tax return- IRS changed my tax return
- 05 Other (Record)
- 06 Don't remember
- 07 Don't know

Q52. Was it clear why you received the notice?

- 01 Yes
- 02 No
- 03 Refuse

Forms Distribution Survey

- Q53. Did you understand what action(s) you were required to take?
01 Yes
02 No
03 Refuse
- Q54. Recalling your experience with the notice, please indicate the level to which you agree or disagree with the following statements with 1 being very dissatisfied and 5 being very satisfied.
- A. The language was understandable
 - B. The layout was easy to follow.
 - C. The size of the print was easy to read.
 - D. The tone of the notice was appropriate.
 - E.. The section headings (if any) were helpful.
 - F. The notice contained all the information I needed.
 - G. The contact information was easy to locate.
- 05 Very satisfied
04
03
02
01 Very dissatisfied
06 [Not applicable/Have not used/No experience]
07 [DK]
09 [Refused]

DEMOGRAPHICS

I have just a few more final questions.

- Q55. What is your age? (Record)
- Q56. Is your gender.....
01 Male
02 Female
- Q57. What is the highest level of education you have completed?
01 Grade school
02 Some high school
03 High school diploma/GED
04 Some college
05 College graduate (4 year)
06 Post-graduate degree
- Q58. Do you have Internet access at home?
01 Yes
02 No
- Q59. Where do you use the Internet most often?
01 Home
02 Work
03 Library
04 Somewhere else
05 Don't use the internet

Forms Distribution Survey

Q60. Are you visually impaired?

- 01 Yes
- 02 No

Q61. Was your annual household income for 2006? Please stop when I get to the correct category.

- 01 Less than \$25,000
- 02 More than \$25,000 but less than \$50,000
- 03 More than \$50,000 but less than \$75,000
- 04 More than \$75,000 but less than \$100,000
- 05 More than \$100,000

CLOSE

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

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

CLOSE2 If you have any comments regarding this study, please write to: IRS, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, Room 6526, 1111 Constitution Avenue, NW, Washington, DC 20224.

CLOSE3. On behalf of the IRS and Macro International Inc., thank you very much for your participation. Your responses will be very helpful for the IRS in better serving taxpayers' needs in the future.

Forms Distribution Survey

**Prototype Customer Satisfaction Survey for External
Customers of Media and Publications Division:**

Business Taxpayer Survey

DRAFT Mail version

**Internal Revenue Service
Tax Forms and Publications Division**

March 3, 2008

Forms Distribution Survey

IRS CUSTOMER SATISFACTION SURVEY MEDIA AND PUBLICATIONS

The overall goal of this research is to help the IRS provide better service to you as a business taxpayer. You can help the IRS improve its service to you and other business taxpayers by answering the questions below. This voluntary survey takes about 20 minutes to complete. Your responses will be confidential, and only aggregate information will be provided to the IRS.

Instructions for marking survey here.

1. Did your business file a 2007 federal income tax return?

Yes

Continue to Question 2

No

Not Sure

Thank you. This completes the survey. Please return your survey in the prepaid envelope.

2. How many years have you been in business? _____

3. Which tax form did you file for your 2007 federal income tax return? *Please check all that apply.*

1120 or 1120A for a Corporation

1120S for an S Corp

1065 for a Partnership

1040 Schedule C for an Individual

1040 Schedule E for an Individual

Other (*Please specify*) _____

Not sure

4. Who prepared your business's 2007 Federal tax return? *Please select one.*

You or someone else in your business

Professional tax preparer (includes Accountant, CPA, Enrolled Agent or other tax preparers)

Someone else (*Please specify*) _____

Not sure

5. How did you or your preparer file your business income tax return?

Filed print tax return by regular mail

Filed electronically by computer (e-file)

Not sure

Forms Distribution Survey

6. Did your business pay estimated taxes in 2007?
- Yes **Continue to Question 7**
 - No **Skip to Question 8**
 - Not sure **Skip to Question 8**
7. How did you determine your estimated tax payments in 2007? Did you try to accurately estimate the amount of your required payment or base it on your prior tax years?
- Tried to accurately estimate the required payment based on this year's data
 - Based it on estimated payments made in prior tax years
 - Not sure
8. Does your business pay employment taxes?
- Yes **Continue to Question 9**
 - No **Skip to Question 11**
 - Not sure **Skip to Question 11**
9. Did you receive assistance with your employment taxes from a tax preparer or a payroll service?
- Received assistance from a tax preparer
 - Received assistance from a payroll service, e.g., Paychex
 - No, filed employment taxes without outside assistance (with or without an employment tax software program)
 - Not sure
10. How did you or your preparer file your employment taxes?
- Filed by regular mail
 - Filed electronically by computer (e-file)
 - Not sure

TAX FORMS, INSTRUCTIONS AND PUBLICATIONS

11. Did you receive ANY tax forms, instructions, or publications for your 2007 Federal tax returns from the following sources? *Please check all that apply.*
- IRS office
 - IRS or other website
 - Tax preparation software or computer program
 - Accountant or tax preparer
 - Library
 - Post office
 - Other (*Please specify*) _____
 - None of these

Forms Distribution Survey

12. Did you use the electronic version of any *Federal tax form* on the IRS website during the 2007 tax season?

Yes

No

Skip to Question 14

13. If yes, which electronic tax form(s) did you use?

14. In thinking about the 2007 tax forms, instructions and publications you used, please rate your satisfaction with each of the following items:

	Strongly Agree 5	4	3	2	Strongly Disagree 1
	▼	▼	▼	▼	▼
a. Knowing where to find tax forms and instructions	○	○	○	○	○
b. The ease of determining which forms and instructions you needed	○	○	○	○	○
c. The ease of understanding the forms	○	○	○	○	○
d. The ease of understanding the instructions for the form	○	○	○	○	○
e. The ease of finding answers in the publications	○	○	○	○	○

Forms Distribution Survey

PUBLICATIONS

15. Please indicate if you have used any of these publications in printed format or in electronic format from the IRS website. If you have not used a publication in the past 12 months, please check "Did Not Use".

	Used Printed Publication ▼	Used Electronic Publication ▼	Did Not Use ▼
a. Pub 553 Highlights of 2007 Tax Change	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Pub 334 Tax Guide for Small Business	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. Pub 535 Business Expenses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. Pub 505 Tax Withholding and Estimated Tax	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. Pub 15 Circular E, Employer's Tax Guide	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
f. Pub 15a Employer's Supplemental Tax Guide	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
g. Pub 15b Employer's Guide to Fringe Benefits	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
h. Other (<i>Please specify</i>) _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If you did not use ANY publications in the past 12 months, please **Skip to Question 21.**

Forms Distribution Survey

16. We would like to know which publications you used most often in the last 12 months. Of the publications below, please check the *three you used most often*. You may enter up to three publications not listed by writing them in under one of the three “Other” choices. Next, check the one that you used most often, 2nd most often, and 3rd most often. Please check only one choice in each column. If you used less than three publications, please check only as many columns as you actually used.

	Used Most Often ▼	Used 2 nd Most Often ▼	Used 3 rd Most Often ▼
a. Pub 553 Highlights of 2007 Tax Change	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Pub 334 Tax Guide for Small Business	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. Pub 535 Business Expenses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. Pub 505 Tax Withholding and Estimated Tax	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. Pub 15 Circular E, Employer’s Tax Guide	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
f. Pub 15a Employer’s Supplemental Tax Guide	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
g. Pub 15b Employer’s Guide to Fringe Benefits	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
h. Other #1 (<i>Please specify</i>) _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
i. Other #2 (<i>Please specify</i>) _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
j. Other #3 (<i>Please specify</i>) _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Forms Distribution Survey

20. How could this publication be improved?

IRS WEBSITE

21. Are you aware that the IRS has a website where you can obtain forms and publications?

Yes

No **Skip to Question 28**

22. Have you ever visited the IRS website (www.irs.gov)?

Yes

No **Skip to Question 28**

23. Approximately how many times did you access the IRS website during the 2007 tax season? (Please estimate)

_____ times

24. Did you use the IRS website in the past year for any of the following reasons? *Please check all that apply.*

View a specific form

Download a specific form

View a specific publication

Download a specific publication

Get an answer to a tax question

See what changes had been made in tax laws

Find out how to get help with your taxes

Other, please specify _____

Did not access IRS website in the past year

Forms Distribution Survey

25. How would you rate your satisfaction with the following aspects of the IRS website?

	Very Satisfied 5 ▼	4 ▼	3 ▼	2 ▼	Very Dissatisfied 1 ▼
a. Appearance of the website	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. The links offered on the home page	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. The ease of finding the information that you needed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. The ease of downloading forms and instructions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

26. How could the IRS website be improved?

27. Take all of these factors into account, how would you rate your overall satisfaction with the IRS website?

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Very Satisfied 5	4	3	2	Very Dissatisfied 1	

MARKETING

28. How satisfied are you that you know about changes which have occurred in **tax forms** that you needed to use for the 2007 tax filing season?

Very Satisfied 5	4	3	2	Very Dissatisfied 1	Not Applicable/No Experience
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

29. How satisfied are you that you know about changes which have occurred in **publications** that you need to use for the 2007 tax year?

Forms Distribution Survey

	Very Satisfied				Very Dissatisfied	Not Applicable/No Experience
30.	5	4	3	2	1	
	○	○	○	○	○	○

How satisfied are you with getting information on **tax law changes** for the 2007 tax year?

	Very Satisfied				Very Dissatisfied	Not Applicable/No Experience
	5	4	3	2	1	
	○	○	○	○	○	○

31 How do you find out that tax forms and publications had changed? *Please check all that apply.*

- IRS website
- IRS workshop
- Professional association
- Word of mouth
- Software programs
- TV, radio, or print advertisements
- Tax Preparer
- Other, please specify _____
- Not sure

OVERALL RATING

32. Overall, how satisfied are you with the IRS regarding the **tax forms** that it develops, produces and distributes to taxpayers?

	Very Satisfied	Satisfied	Somewhat Satisfied	Dissatisfied	Very Dissatisfied
	5	4	3	2	1
	○	○	○	○	○

Forms Distribution Survey

33. Overall, how satisfied are you with the IRS regarding the **instructions** that it develops, produces and distributes to taxpayers?

34.

Very Satisfied	Satisfied	Somewhat Satisfied	Dissatisfied	Very Dissatisfied	Overall, how satisfied are you with the IRS regarding the publications that it develops, produces, and distributes to taxpayers?
5	4	3	2	1	
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	

Very Satisfied	Satisfied	Somewhat Satisfied	Dissatisfied	Very Dissatisfied
5	4	3	2	1
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If you have any questions about this survey, you may call the Survey Processing Center at 1-866-377-8208.

If you have been unable to resolve any specific problems with your tax matter through normal IRS channels, or now face a significant hardship due to the application of the tax law, you may contact the Taxpayer Advocate Service at 1-877-777-4778.

Paperwork Reduction Act Notice

The Paperwork Reduction Act requires that the IRS display OMB control number on all public information requests. The OMB Control Number for this study is XXXX-XXXX. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to: Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, Room 6526, 1111 Constitution Ave. NW, Washington, DC 20224.

Thank you for completing the survey.
Please return this questionnaire by mail using the enclosed business return envelope.

Forms Distribution Survey

**Prototype Customer Satisfaction Survey for External
Customers of Media and Publications Division:**

**Tax Preparer Survey
DRAFT Mail version**

**Internal Revenue Service
Tax Forms and Publications Division**

February 28, 2008

Forms Distribution Survey

IRS CUSTOMER SATISFACTION SURVEY MEDIA AND PUBLICATIONS

The overall goal of this research is to help the IRS provide better service to you as a tax preparer. You can help the IRS improve its service to you and other tax preparers by answering the questions below. This voluntary survey takes about 20 minutes to complete. Your responses will be confidential, and only aggregate information will be provided to the IRS.

Instructions for marking survey here.

1. Approximately how many 2007 federal income tax returns did you prepare for **individuals**?
 - Less than 100
 - 100 or more
 - Not sure
2. Approximately how many 2007 federal income tax returns did you prepare for **businesses**?
 - Less than 100
 - 100 or more
 - Not sure

TAX FORMS

3. How often did you help prepare the following federal tax forms in the most recent tax year?

	Frequently	Sometimes	Rarely	Never
a. Short form 1040EZ	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Short form 1040A	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Long form 1040	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. Form 1040-ES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e. Form 940	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f. Form 941	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g. Form 1065	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Forms Distribution Survey

	Very Good 5	4	3	2	Very Poor 1	Not Applicable
	▼	▼	▼	▼	▼	▼
n. Pub 970 - Tax Benefits for Education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
o. Another publication (<i>Please specify</i>) _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

11. For any publications rated a “1” or “2”, please tell us why you rated them poorly. If you rated more than three publications a “1” or “2”, please choose only three publications to provide feedback on. Please be sure to specify the publication number you are referring to.

MARKETING

12. How satisfied are you that you know about changes in **tax forms** you needed to use for 2007 tax filing season?

Very Satisfied 5	4	3	2	Very Dissatisfied 1
▼	▼	▼	▼	▼
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

13. How satisfied are you that you know about changes in **publications** you needed to use for 2007 tax filing season?

Very Satisfied 5	4	3	2	Very Dissatisfied 1
▼	▼	▼	▼	▼
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Forms Distribution Survey

Very Satisfied				Very Dissatisfied
5	4	3	2	1
▼	▼	▼	▼	▼

14. How do you find out that tax forms and publications have changed? *Please check all that apply.*

- IRS website
- IRS workshop
- Professional association
- Word of mouth
- Software programs
- TV, radio, or print advertisements
- Other, please specify _____
- Not sure

OVERALL RATING

15. Overall, how satisfied are you with the IRS regarding the **tax forms** that it develops, produces and distributes to taxpayers?

Very Satisfied	Satisfied	Somewhat Satisfied	Dissatisfied	Very Dissatisfied
5	4	3	2	1
○	○	○	○	○

16. Overall, how satisfied are you with the IRS regarding the **instructions** that it develops, produces and distributes to taxpayers?

Very Satisfied	Satisfied	Somewhat Satisfied	Dissatisfied	Very Dissatisfied
5	4	3	2	1
○	○	○	○	○

17. Overall, how satisfied are you with the IRS regarding the **publications** that it develops, produces, and distributes to taxpayers?

Forms Distribution Survey

Very Satisfied 5	Satisfied 4	Somewhat Satisfied 3	Dissatisfied 2	Very Dissatisfied 1
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

18. How could IRS improve on the way it develops, produces and distributes tax products to taxpayers?

If you have any questions about this survey, you may call the Survey Processing Center at 1-866-377-8208.

Paperwork Reduction Act Notice

The Paperwork Reduction Act requires that the IRS display OMB control number on all public information requests. The OMB Control Number for this study is XXXX-XXXX. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to: Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, Room 6526, 1111 Constitution Ave. NW, Washington, DC 20224.

Forms Distribution Survey

**Prototype Customer Satisfaction Survey for External
Customers of Media and Publications Division:**

**Volunteer Partner Survey
FINAL Web Survey**

**Internal Revenue Service
Tax Forms and Publications Division**

February 28, 2008

Forms Distribution Survey

Welcome to the IRS Stakeholder Partnerships, Education and Communication Partners (SPEC) customer satisfaction survey. Macro International Inc., an independent research organization, is working with the IRS to obtain your feedback about forms, publications, and services that are used to assist customers in understanding, preparing, and filing federal income tax returns. We are surveying SPEC partners who provide tax assistance such as outreach and education programs and develop partnerships with national and local organizations to provide free tax return preparation services at Volunteer Income Tax Assistance (VITA) or Tax Counseling for the Elderly (TCE) sites

This survey should take no longer than 15 minutes. You will be able to suspend the survey at any time and re-enter the survey where you left off without losing any of your responses.

Thank you in advance for your participation in this important survey.

Confidentiality and Security

Macro International will hold your identity confidential and will provide results to IRS in aggregate. Macro will provide IRS with the raw data with all personally identifying information removed. In addition, the survey is hosted on a secure server. Please feel confident that your answers will be used solely for the purpose stated above.

Instructions

- | | |
|-----------------------------|--|
| Moving forward: | Click on the NEXT button to save your responses and continue to the next page. |
| Moving back: | Click on the PREVIOUS button to view your responses on a previous page. You may change your answers to previously entered responses. |
| Suspending and re-entering: | You may suspend the survey at any time by clicking STOP. You may re-enter the survey where you left off by clicking on the survey website from your invitation e-mail. |

Forms Distribution Survey

1. Did your organization participate in the IRS Stakeholder Partnerships, Education and Communication Partners (SPEC) program in the past 12 months?
 - Yes
 - No

Thank and terminate

2. How many years have you personally been working with the IRS to provide tax assistance and/or tax education?
 - 1 to 5 years
 - 6 to 10 years
 - 11 to 15 years
 - More than 15 years

3. What is the primary nature of your relationship with SPEC? *[Note: program so that respondent can only select one response].*
 - Military Volunteer Income Tax Assistance
 - Volunteer Income Tax Assistance, or VITA
 - Education and Outreach (Communications, products, news articles, or websites)
 - Tax Counseling for the Elderly, Non-AARP
 - Tax Counseling for the Elderly, AARP
 - Something else (*Please specify*)_____
 - Don't know

4. At your site, approximately how many **customers** do you reach through your tax assistance and/or tax education programs each year?
 - 1 to 50
 - 51 to 100
 - 101 to 1000
 - 1001 to 2500
 - More than 2500
 - Don't Know

Forms Distribution Survey

FEDERAL TAX FORMS AND SCHEDULES

5. How often did you help prepare the following federal tax forms and schedules in the 2007 tax year?

(Programmer: If Q5 a-k ≠ “Frequently”, skip to Q7. If Q5 a-k = “Frequently”, continue to Q6 and repeat Q6 up to 3 times as required. If more than three items in Q5 a-k = “Frequently”, choose three items at random to continue with Q6. After 3rd repetition, continue to Q7.)

	Frequently	Sometimes	Rarely	Never
a. Short Form 1040EZ	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Short Form 1040A	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Long Form 1040	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. Form 1040ES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e. Form 8812 for the Additional Child Tax Credit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f. Form 2441 Child and Dependant Care Expenses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g. Form 8888 Direct Deposit of Refund to More than One Account	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
h. Schedule A for Itemized Deductions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
i. Schedule B for Interest and Dividend Income	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
j. Schedule D for Capital Gains for Losses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
k. Schedule EIC for the Earned Income Credit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6. How would you rate the following aspects of [insert name of form/schedule]?

	Very Good				Very Poor
	5	4	3	2	1
	▼	▼	▼	▼	▼
a. Table of contents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Important changes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Index at back	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. Worksheet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Forms Distribution Survey

	Very Good 5 ▼	4 ▼	3 ▼	2 ▼	Very Poor 1 ▼
e. Examples	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f. Flow charts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g. Appendix	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
h. Tax tables	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7. In general, how would you rate each of the following IRS **forms and schedules**?

	Very Good 5 ▼	4 ▼	3 ▼	2 ▼	Very Poor 1 ▼	Don't Know/Not Applicable ▼
a. Short Form 1040EZ	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Short Form 1040A	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Long Form 1040	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. Form 1040ES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e. Schedule A for itemized deductions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f. Schedule B for interest and dividend income	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g. Schedule D for capital gains for losses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
h. Other (please specify _____)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

(Programmer: If Q7 a-h ≠ 1 or 2, skip to Q9. If Q7 a-h = 1 or 2, continue to Q8 and repeat up to 3 times as required. If more than three items in Q7 a-h = 1 or 2, choose three items at random to continue with Q8. After 3rd repetition, continue to Q9.)

Forms Distribution Survey

8. Please tell us why you rated *[Insert name of form/schedule]* poorly.

9. In thinking about your recent experience with all federal tax forms, to what extent you agree or disagree with the following statements.

	Strongly Agree	4	3	2	Strongly Disagree
	5	4	3	2	1
	▼	▼	▼	▼	▼
a. The graphics and layout made it easy to follow	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. The size of the print made it easy to read	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. It was easy to find the information I was looking for	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. It was easy to go back and forth between the publication and the tax form	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e. The section headings were useful	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f. The publication clearly explained what I needed to know	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g. I feel confident in the calculations that I made with it	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Forms Distribution Survey

FEDERAL TAX INSTRUCTIONS

10. In general, how would you rate the following aspects of federal tax instructions?

	Very Good				Very Poor	Don't Know/ Not Applicable
	5	4	3	4	5	
	▼	▼	▼	▼	▼	▼
a. Table of contents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Important changes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Index at back	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. Worksheet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e. Examples	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f. Flow charts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g. Appendix	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

FEDERAL TAX PUBLICATIONS

11. How often did you use the following federal tax publications in the 2007 tax year?

	Frequently	Sometimes	Rarely	Never
a. Publication 17 -Your Federal Income Tax (For Individuals)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Publication 596- Earned Income Credit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Publication 553 Highlights of Tax Changes for 2007	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. Publication 554 - Older Americans' Tax Guide	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

12. If you used other publications frequently during the 2007 tax year, please list up to three others below.

- a. Frequently used pub #1 (*Please specify*) _____
- b. Frequently used pub #2 (*Please specify*) _____
- c. Frequently used pub #3 (*Please specify*) _____

Forms Distribution Survey

(Programmer: If Q 11 a-d = "Frequently" and/or Q12 a-c has an entry, continue to Q13. Repeat Q13 as required UP TO three times. If more than three items either in Q11 a-d = "Frequently" or have an entry in Q12 a-c, choose three items at random to ask about in Q13 . After 3rd repetition of Q13, continue to Q14.)

13. In general, how would you rate the following aspects of *[insert name of federal tax publication]*?

	Very Good				Very Poor
	5	4	3	2	1
	▼	▼	▼	▼	▼
i. Table of contents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
j. Important changes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
k. Index at back	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
l. Worksheet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
m. Examples	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
n. Flow charts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
o. Appendix	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
p. Tax tables	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Forms Distribution Survey

14. In general, how would you rate each of the following IRS publications?

	Very Good 5 ▼	4 ▼	3 ▼	2 ▼	Very Poor 1 ▼	Don't Know/Not Applicable ▼
a. Pub 17 Your Federal Income Tax	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Pub 3136 People Age 15 to 23: You May Not Be Required to File	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Pub 501 Exemptions, Standard Deductions and Filing Instructions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. Pub 502 Medical and Dental Expenses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e. Pub 505 Tax Withholding and Estimated Tax	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f. Pub 523 Selling Your Home	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g. Pub 550 Investment Income and Expenses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
h. Pub 553 Highlights of Tax Changes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
i. Pub 590 Individual Retirement Arrangements (IRAs)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
j. Pub 596 Earned Income Credit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
k. Pub 970 Tax Benefits for Education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
l. Other, please specify	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Forms Distribution Survey

(Programmer: If Q14 a-l ≠ 1 or 2, skip to Q16. If Q14a-l = 1 or 2, continue to Q15. Repeat Q15 up to three times as required. If more than three items in Q14 = 1 or 2, choose three items at random to ask about in Q15 . After 3rd repetition of Q15, continue to Q16.)

15. Please tell us why you rated *[Insert name of form/schedule]* poorly.

MARKETING

16. How satisfied are you that you know about changes which have occurred in **tax forms** that you needed to use for 2007 tax filing season?

Very Satisfied					Very Dissatisfied
5	4	3	2	1	
▼	▼	▼	▼	▼	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

17. How satisfied are you with getting information on **tax law changes** for the current filing season?

Very Satisfied					Very Dissatisfied
5	4	3	2	1	
▼	▼	▼	▼	▼	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

18. How do you find out when tax forms and publications have changed?
Please check all that apply.

	Tax Forms	Publications
a. IRS Website	<input type="checkbox"/>	<input type="checkbox"/>
b. IRS workshop	<input type="checkbox"/>	<input type="checkbox"/>
c. IRS Relationship	<input type="checkbox"/>	<input type="checkbox"/>

Forms Distribution Survey

	Tax Forms	Publications
Manager/SPEC Contact		
d. Professional association	<input type="checkbox"/>	<input type="checkbox"/>
e. Word of mouth	<input type="checkbox"/>	<input type="checkbox"/>
f. Software programs	<input type="checkbox"/>	<input type="checkbox"/>
g. TV, radio or print advertisements	<input type="checkbox"/>	<input type="checkbox"/>
h. Other #1 <i>(Please specify)</i> _____	<input type="checkbox"/>	<input type="checkbox"/>
i. Other #2 <i>(Please specify)</i> _____	<input type="checkbox"/>	<input type="checkbox"/>
j. Not sure	<input type="checkbox"/>	<input type="checkbox"/>

19. How satisfied are you with the way the IRS communicates changes in federal tax products to its customers?

Very Satisfied				Very Dissatisfied
5	4	3	2	1
▼	▼	▼	▼	▼
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

(Programmer: If Q19 = 3,4,5, SKIP to Q21.)

20. How can the IRS improve the way it communicates changes in federal tax products to its customers?

Forms Distribution Survey

OVERALL RATING

21. Overall, how satisfied are you with the IRS regarding the **tax forms** that it develops, produces and distributes to taxpayers?

Very Satisfied	Satisfied	Somewhat Satisfied	Dissatisfied	Very Dissatisfied
5	4	3	2	1
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

22. Overall, how satisfied are you with the IRS regarding the **instructions** that it develops, produces and distributes to taxpayers?

Very Satisfied	Satisfied	Somewhat Satisfied	Dissatisfied	Very Dissatisfied
5	4	3	2	1
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

23. Overall, how satisfied are you with the IRS regarding the **publications** that it develops, produces, and distributes to taxpayers?

If	Very Satisfied	Satisfied	Somewhat Satisfied	Dissatisfied	Very Dissatisfied	you have any questions about this survey, you may call Survey Processing Center at 866-377-8208.
	5	4	3	2	1	
the	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
1-						

Paperwork Reduction Act Notice

The Paperwork Reduction Act requires that the IRS display OMB control number on all public information requests. The OMB Control Number for this study is XXXX-XXXX. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to: Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, Room 6526, 1111 Constitution Ave. NW, Washington, DC 20224.

Forms Distribution Survey

***Prototype Customer Satisfaction Survey for External Customers of
Media and Publications Division:***

**Forms Distribution Survey
Web version**

**Internal Revenue Service
Tax Forms and Publications Division**

February 28, 2008

Forms Distribution Survey

Web Introduction

Welcome to the Internal Revenue Service (IRS) customer satisfaction survey! Macro International Inc., an independent research organization, is working with the IRS to obtain your feedback about forms, publications, and services that are used to assist customers in understanding, preparing, and filing federal income tax. We are surveying partners who redistribute IRS products to the public. Your participation is very important to help the IRS design products and services that meet the needs of taxpayers.

This survey should take no longer than 15 minutes. You will be able to suspend the survey at any time and re-enter the survey where you left off without losing any of your responses.

Thank you in advance for your participation in this important survey.

Confidentiality and Security

Macro International will hold your identity confidential and will provide results to IRS in aggregate. Macro will provide IRS with the raw data with all personally identifying information removed. In addition, the survey is hosted on a secure server. Please feel confident that your answers will be used solely for the purpose stated above.

Instructions

Moving forward: Click on the NEXT button to save your responses and continue to the next page.

Moving back: Click on the PREVIOUS button to view your responses on a previous page. You may change your answers to previously entered responses.

Suspending and re-entering: You may suspend the survey at any time by clicking STOP. You may re-enter the survey where you left off by clicking on the survey website from your invitation e-mail.

CUSTOMER CLASSIFICATION

1. What is your primary relationship to the IRS? Are you ? *Please check only one*
- Tax Forms Outlet Program (TFOP)
 - Community Based outlet Program (CBOP)
 - International Program (INTL)
 - Other Please specify _____ **[Skip to Q3]**
 - Don't know
2. In what type of business or government agency do you work? *Please check only one*
- Credit union
 - Copy center
 - Grocery
 - Library
 - Pharmacy
 - Post office
 - City/County government offices
 - Military installation
 - Prison
 - Federal government
 - Department of State
 - Embassy
 - Other, please specify _____

TAX PRODUCT ORDERING AND FULFILLMENT

3. During the 2007 tax year, about how many people obtained federal tax products from your location?
- None **[Terminate survey] Thank you**
 - 1-250
 - 251-500
 - More than 500
4. How did you order the federal tax forms, instructions, publications or other federal tax products for the most current tax year? *Please select all that apply*
- Internet **[If checked, include Q5; otherwise, skip Q5]**
 - Telephone **[If checked, include Q6; otherwise, skip Q6]**
 - Order blank/quantity survey **[If checked, include Q7; otherwise, skip Q7]**
 - Other. Please specify _____
5. How would you rate your experience with ordering your federal tax products by Internet?
- 5 - Very easy
 - 4
 - 3
 - 2
 - 1 - Very difficult
 - Don't know
6. How would you rate your experience with ordering your federal tax products by telephone?
- 5 - Very easy

- 4
- 3
- 2
- 1 - Very difficult
- Don't know

7. How would you rate your experience with ordering your federal tax products by order blank?

- 5 - Very easy
- 4
- 3
- 2
- 1 - Very difficult
- Don't know

8. How valuable are reproducibles (federal tax products that you can copy), considering that federal tax products are available on the Internet?

- 5 - Very valuable **[Skip to Q10]**
- 4 **[Skip to Q10]**
- 3 **[Skip to Q10]**
- 2
- 1 – Not at all valuable
- Don't know **[Skip to Q10]**

9. Why aren't reproduceables valuable to you?

10. How valuable is the CD containing federal tax products to you, considering that federal tax products are available on the Internet?

- 5 - Very valuable **[Skip to Q12]**
- 4 **[Skip to Q12]**
- 3 **[Skip to Q12]**
- 2
- 1 – Not at all valuable
- Don't know **[Skip to Q12]**

11. Why isn't the CD valuable to you?

12. Did you receive all, some, or none of the 2007 federal tax products that you ordered?

- All **[Skip to Q14]**
- Some **[Skip to Q14]**
- None

13. Please list the products that you did not receive. **[Skip to Q17]**

14. Were these tax products that you ordered for 2007 federal tax year received within a time frame that met your expectations?
 Always **[Skip to Q22]**
 Some of the time
 Never
15. Which federal tax products were not received within a timeframe that met your expectations?

16. On average, how much later than expected were those products received?
 1 week
 2 weeks
 3 weeks
 1 month
 More than a month
17. Did you receive any communications from the IRS explaining that products would be going out or arriving late?
 Yes
 No
18. When you did not receive the federal tax products you ordered within a timeframe that met your expectations, which of the following did you do?
Please check all that apply.
 Checked the IRS programs, including website, for product availability or delays
 Downloaded product(s) from the web
 Called the Tax Forms Outlet Program (TFOP)
 Called the Community Based Outlet Program (CBOP)
 Took no action
 Other Please specify _____

19. How easy was it for you to reach the IRS about your late product(s)?
- 5 - Very easy **[Skip to Q21]**
 - 4 **[Skip to Q21]**
 - 3 **[Skip to Q21]**
 - 2
 - 1 – Very difficult
 - Don't know **[Skip to Q21]**
20. What was difficult about reaching the IRS about your late product(s)?
-
-
-
21. **[If Q12=None, Skip to Q22]** How satisfied were you that the IRS resolved the issues with the product(s) that were delivered late?
- 5 - Very satisfied
 - 4
 - 3
 - 2
 - 1 - Very dissatisfied
 - Don't know
22. Are you aware of the IRS's methods to inform you of late product delivery?
- Yes
 - No
23. What is the best method for the IRS to get updated information to you?
- Internet
 - E-Mail
 - Mail
 - Other Please specify _____
24. Did you receive your order in multiple shipments?
- Yes
 - No **[Skip to Q27]**
 - Don't know **[Skip to Q27]**
25. Did receiving multiple shipments present any challenges or difficulties for you?
- Yes
 - No **[Skip to Q27]**
26. Please describe the challenges did you encountered in receiving your order in multiple shipments.
-
-
-
27. Did you receive the most current federal tax products you ordered in good usable condition?
- Yes **[Skip to Q30]**
 - No

28. Which federal tax products were not received in a usable condition?

29. When you did not receive the federal tax products that you ordered in a usable condition, which of the following did you do? *Please check all that apply.*
- Called the IRS
 - Downloaded product from the web
 - Called the Tax Forms Outlet Program (TFOP)
 - Called the Community Based Outlet Program (CBOP)
 - Called the International Program (INTL)
 - Did nothing
 - Other, please specify _____
30. How would you rate your experience with reaching the IRS (CBOP/TFOP) about the defective product?
- 5 - Very easy **[Skip to Q32]**
 - 4 **[Skip to Q32]**
 - 3 **[Skip to Q32]**
 - 2
 - 1 – Very difficult
 - Don't know **[Skip to Q32]**
31. What was difficult about reaching the IRS about tax products that were not usable?

OVERALL SATISFACTION

32. Overall, how would you rate your satisfaction with the IRS order and delivery process for federal tax products and services?
- 5 - Very satisfied **[Skip to Q34]**
 - 4 - Satisfied **[Skip to Q34]**
 - 3 – Somewhat Satisfied **[Skip to Q34]**
 - 2 - Dissatisfied
 - 1 - Very dissatisfied
 - Don't know **[Skip to Q34]**
33. What were the reason(s) for your dissatisfaction with the services you received through the program?

34. In your opinion, what would be the most important improvements that the IRS could make in its tax forms order and fulfillment process for distribution?

If you have any questions about this survey, you may call the Survey Processing Center at 1-866-377-8208.

Paperwork Reduction Act Notice

The Paperwork Reduction Act requires that the IRS display OMB control number on all public information requests. The OMB Control Number for this study is XXXX-XXXX. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to: Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, Room 6526, 1111 Constitution Ave. NW, Washington, DC 20224.

**Example
Pre-Notification Letter
(Business Taxpayers)**

[IRS LOGO]

[IRS DEPARTMENT LETTERHEAD]

[DATE]

JOHN Q SAMPLE
SAMPLE ADDRESS 1
SAMPLE ADDRESS 2
SAMPLE ADDRESS 3
ANYTOWN, US 12345-6789

Dear [INSERT NAME]:

I am asking for your help in improving the level of service the IRS provides businesses. In a few days, you will receive a survey asking for your opinions about the resources available to you when you prepare your tax returns. By completing this survey, you will help the IRS develop a comprehensive portfolio of service improvements.

This brief survey, which can be completed via the Web or by mail, should take about 15 minutes to complete. Macro International Inc., an independent research company, is administering the survey and will keep your individual identity confidential. Macro International will not provide any identifying information to the IRS along with your responses. Your responses will be reported to the IRS in aggregate with the responses from other tax professionals. Your participation is voluntary.

We are committed to improving service to every customer. Your survey will arrive in the mail with a week. It will also include instructions for completing the survey via the Web. Please help us in this effort by completing and returning the survey as soon as possible.

Sincerely,

Craig Johnson
Acting Director, Research and Analysis
Wage and Investment Division

Example
Cover Letter – First Survey
(Business Taxpayers)

Survey Processing Center

P.O. Box 344
Claysburg, PA 16625 USA

[DATE]

JOHN Q SAMPLE
SAMPLE ADDRESS 1
SAMPLE ADDRESS 2
SAMPLE ADDRESS 3
ANYTOWN, US 12345-6789

Dear [INSERT NAME]:

A few days ago, you received a letter from Craig Johnson, Acting Director, Research and Analysis, Wage and Investment Division, IRS, asking for your assistance in improving the IRS resources available to businesses. The IRS is committed to improving its performance and service to the American public and its partners. As part of this improvement effort, the IRS is conducting a survey of businesses that prepare and file business returns.

You were chosen at random from a list of businesses. Macro International Inc., an independent research company, is administering the survey. You may complete the survey either by mail or online. If you choose to complete it online, please go to the following weblink:

www.business2008survey.com

Once you access the website for the survey, you will be asked to provide a unique password. Please enter the password below:

PASSWORD [Note to NPC: Password will be generated from sample for each survey recipient.]

You can access the survey from any computer that has Internet access by clicking on the above Internet address or by copying the Internet address into your browser. The web address above includes a password that will enable you to exit the survey and re-enter at a later time. It will also protect any data you have entered if you experience any computer disruptions. Macro International will not share these passwords with the IRS at any time during or after this study.

Macro International will keep your responses and individual identity confidential and will not provide any identifying information to the IRS along with your responses. Your responses will be reported to the IRS in aggregate with the responses from other businesses. While your participation is voluntary, we strongly encourage you to complete and return the survey.

The survey should take about 15 minutes to complete. If you are completing the survey by mail, please use the postage-paid reply envelope to return your completed survey by [insert day/date]. If you have any questions or concerns, please feel free to call us toll free at 1-866-377-8208.

Thank you in advance for your cooperation.

Sincerely,

Larry Luskin
Project Director

**Example
Reminder Postcard
(Business Taxpayers)**

Do We Have Your Input Yet?

Recently, you received a survey asking for your opinions about the IRS resources that are available to you as a business when preparing your business' taxes.

If you have already completed and returned the survey, please accept our sincere thanks. If not, please take a few minutes to complete and return the survey today. Your input is very important, and we want to be sure that we include your feedback.

If you did not receive the survey, or it has been misplaced, please call us at 1-866-377-8208. When contacting us, you may also request your unique password to complete the survey online (www.business2008survey.com).

Larry Luskin
Project Director

Example
Cover Letter – Second Survey
(Business Taxpayers)

Survey Processing Center

P.O. Box 344
Claysburg, PA 16625 USA

[DATE]

JOHN Q SAMPLE
SAMPLE ADDRESS 1
SAMPLE ADDRESS 2
SAMPLE ADDRESS 3
ANYTOWN, US 12345-6789

Dear [INSERT NAME]:

Recently, you received a survey requesting your input on the IRS resources available to business owners. So far, we have not received your completed survey. As described in our previous communications, on behalf of the IRS, we are administering a nationwide survey to gather reliable information from businesses that prepare and file business tax returns. Your responses are critical to our efforts to enhance the resources available to businesses.

If you have not already done so, please take a few minutes, today, to provide your feedback to the IRS either by mail or online. Macro International Inc., an independent research company, is administering the survey. If you choose to complete it online, please go to the following weblink:

www.business2008survey.com

Once you access the website for the survey, you will be asked to provide a unique password. Please enter the password below:

PASSWORD [Note to NPC: Password will be generated from sample for each survey recipient.]

The password will protect any data you have entered if you experience any computer disruptions. Macro International will not share these passwords with the IRS at any time during or after this study.

Macro International will keep your responses and individual identity confidential and will not provide any identifying information to the IRS along with your responses. Your responses will be reported to the IRS in aggregate with the responses from other businesses. While your participation is voluntary, we strongly encourage you to complete and return the survey by DAY/DATE.

The survey should take about 15 minutes to complete. If you are completing the survey by mail, please use the postage-paid reply envelope to return your completed survey. If you have any questions or concerns, please feel free to call us toll free at 1-866-377-8208.

Thank you in advance for your cooperation.

Sincerely,

Larry Luskin
Project Director