



**2008 Form 2290 Modernized e-file
Customer Satisfaction Survey**

RESPONDENT INFO

RESPONDENT ID# _____ (1-5)

CIRCLE CELL AS IDENTIFIED ON LIST...

- Form 2290 e-file Users (n=500) (See List For Mandated Append & Place As...)**
- Mandated Users (n is expected to = about 45%).....1** ...09
 - Non-Mandated Users (the balance of n, or about 55%).....2**
 - Form 2290 e-file NON-Users (n=500).....3**

**RECORD SOFTWARE ID FROM LIST - ONE OF 5 IDs REPRESENTING 5 SOFTWARE DEVELOPERS NOTE:
SOFTWARE ID MIGHT BE IN A DIFFERENT FORMAT THAN 1-5. REVISE WHEN KNOWN. TAB ALL DATA BY THIS ID.**

- Software ID #1.....1** ...10
- Software ID #2.....2**
- Software ID #3.....3**
- Software ID #4.....4**
- Software ID #5.....5**

CITY _____ ST _____ ZIP _____ ST CODE _____

PHONE # (AC-____) _____

AREA (RE-SET IRS AREAS PER LATEST DEFINITIONS:)

AREA: Area 1.....1 Area 2.....2 Area 3.....3 Area 4.....4 Area 5.....5 ...11

RECORD DATE, TIME & DISPOSITION FOR EACH ATTEMPT ON THIS PERSON

			<u>Disc</u>	<u>NA</u>	<u>Unavail</u>	<u>Ref</u>	<u>NQ</u>	<u>Comp</u>	
1	DATE: _____	TIME: _____	1	2	3	4	5	6	...12
2	DATE: _____	TIME: _____	1	2	3	4	5	6	...13
3	DATE: _____	TIME: _____	1	2	3	4	5	6	...14
4	DATE: _____	TIME: _____	1	2	3	4	5	6	...15
5	DATE: _____	TIME: _____	1	2	3	4	5	6	...16
6	DATE: _____	TIME: _____	1	2	3	4	5	6	...17
7	DATE: _____	TIME: _____	1	2	3	4	5	6	...18
8	DATE: _____	TIME: _____	1	2	3	4	5	6	...19
9	DATE: _____	TIME: _____	1	2	3	4	5	6	...20
10	DATE: _____	TIME: _____	1	2	3	4	5	6	...21

INTERVIEWER _____ (22)

INTRODUCE YOURSELF TO THIS COMPANY WITH:

Hello, my name is _____ of Russell Research in New York, an independent national survey research firm. The Internal Revenue Service has asked us to contact senior executives for their opinions about filing of Federal business taxes and tax forms. May I speak with the senior-most person responsible for deciding how this company's Federal tax forms are filed? (AFTER REACHING THIS PERSON, CONTINUE WITH...)

NOTE TO RUSSELL STAFF AND FOR USE IN INTERVIEWER BRIEFINGS: THIS SURVEY IS ABOUT THE "HEAVY HIGHWAY VEHICLE USE TAX FORM", FORM 2290. RESPONDENTS WILL BE PEOPLE IN TRUCKING COMPANIES - AND SOME WILL BE IN VERY SMALL TRUCKING COMPANIES, PERHAPS COMPANIES WITH ONLY A COUPLE OF EMPLOYEES (ONE OF WHOM IS PROBABLY FILLING OUT FEDERAL TAX FORMS - THOUGH YOU MIGHT ALSO GET SOME USE OF EXTERNAL PREPARERS). KEEP THIS IN MIND WHEN CALLING AND INTERVIEWING, AND USE THE TERM "COMPANY" HERE INSTEAD OF THE USUAL ETA CUST SAT LANGUAGE OF "ORGANIZATION".

A. The IRS has asked us to get your company's opinions about Federal Tax Form 2290, The Heavy Highway Vehicle Use Tax Form. First, who decides how your company's Form 2290 is filed? Is it... (READ CHOICES & CIRCLE ONLY ONE RESPONSE.)

- You and/or other executives or personnel within the company.....1 ...23
- You and/or other executives in consultation with an outside tax professional, accountant, or CPA 2
- Or, does your company leave this decision entirely to an outside tax professional, accountant, or CPA? 3

B. And who actually prepares your company's Federal Form 2290? Is it...(READ CHOICES & CIRCLE ONLY ONE RESPONSE.)

- You personally (ASK Q's C-D-E-F-G).....1 ...24
- Others within your company (ASK C-D-E-F, THEN SKIP TO Q.H FOR REFERRAL TO SOMEONE ELSE IN COMPANY) 2
- Or, is it prepared by an outside tax professional, accountant, or CPA?
(ASK Q's. C-D-E-F & THEN SKIP TO Q. I TO GET REFERRAL TO EXTERNAL PREPARER).....3

FOLLOWING Q's ARE ASKED OF SAME SENIOR-MOST PERSON YOU WERE TALKING TO IN Q's. A & B. IF GETTING REFERRAL, SECURE COMPANY-RELATED INFO IN Q's C-F FROM THAT SENIOR PERSON B-E-F-O-R-E ASKING FOR A REFERRAL.

C. Before we go further, let me get some basic background information on your company. First, in total, how many people are employed by your company at all of its locations? (ENTER NUMBER OF EMPLOYEES BELOW.)

- | | | |
|-------------|-------------------|-------|
| 1-4.....1 | 100-249.....5 | ...25 |
| 5-9.....2 | 250-499.....6 | |
| 10-19.....3 | 500 or More.....7 | |
| 20-99.....4 | Refused.....y | |

(sk26-27)

D. What is the primary type of industry in which your company operates? (RECORD BELOW.)

(NOTE: INDUSTRY LIKELY "TRUCKING", BUT CONFIRM.)

(USE CENSUS NAICS CODES FOR CLASSIFICATION) _____

- _____28
- _____29
- _____30

E. All of our questions today relate to the year ending December 31, 2008. Which of the following best describes your company's total revenues for 2008? Please stop me when I've read the category that best describes your company's total 2008 revenues. (STARTING AT LOWEST REVENUE LEVEL, READ LIST UNTIL RESPONDENT STOPS YOU AND THEN CIRCLE THAT ONE ANSWER.)

- | | | |
|------------------------------------|--------------------------------------|----------|
| Less than \$100,000.....1 | \$10 million to \$24,999,999.....1 | ...31-32 |
| \$100,000 to \$249,999.....2 | \$25 million to \$49,999,999.....2 | |
| \$250,000 to \$499,999.....3 | \$50 million to \$99,999,999.....3 | |
| \$500,000 to \$999,999.....4 | \$100 million to \$499,999,999.....4 | |
| \$1 million to \$2,499,999.....5 | \$500 million to \$999,999,999.....5 | |
| \$2.5 million to \$4,999,999.....6 | \$1 Billion Or More.....6 | |
| \$5 million to \$9,999,999.....7 | Refused.....7 | |

F. And what is your title? (RECORD ANSWER VERBATIM.)

33-34

IF CURRENT RESPONDENT IS ALSO THE ACTUAL PREPARER OF FORM 2290 (IN Q. "B"), READ "G" NEXT.

G. You mentioned that you personally prepare your company's Form 2290. I'd like to get your opinions on the preparation and filing of this form. This interview should take only about 15 minutes from this point. Would you be willing to participate in the survey? (IF "YES", CONTINUE WITH Q1 IF "NO", TERM, TALLY & SEE SUPERVISOR.)

1	2	3	4	5	6	7	8	9
---	---	---	---	---	---	---	---	---

...35

IF THE PREPARER IS SOMEONE ELSE IN THE COMPANY (IN Q. "B"), SECURE REFERRAL AS FOLLOWS...

H. You mentioned earlier that someone else in your company actually prepares Federal Tax Form 2290. The IRS would like to know what the actual experience of preparing and filing Form 2290 is like. Would you kindly refer me to the person in this company who prepares the return so that I can speak with them about that experience? (GET REFERRAL, CALL THAT PERSON AND CONSIDER THEM TO BE YOUR FINAL RESPONDENT FOR THIS COMPANY, INTRODUCE YOURSELF AND CONTINUE WITH...) **Hello, I'm** (INTERVIEWER NAME) **of Russell Research in New York, an independent national survey research firm. The Internal Revenue Service has asked us to conduct a survey about the preparation and filing of Federal Tax Form 2290. Mr./Ms.** (NAME OF FIRST RESPONDENT) **told me that you're the person who actually prepares your company's return. Would you be willing to take 15 minutes to participate in this survey?** (IF "YES", GO TO Q1 & CONTINUE. IF "NO", TERM, TALLY & SEE SUPERVISOR.)

1	2	3	4	5	6	7	8	9
---	---	---	---	---	---	---	---	---

...36

IF THE PREPARER IS AN OUTSIDE TAX PRO, ACCOUNTANT, OR CPA (Q. "B"), SECURE REFERRAL AS FOLLOWS...

I. You mentioned earlier that an outside tax professional, accountant, or CPA actually prepares your company's Federal Tax Form 2290. The IRS would like to know what the actual experience of preparing and filing this form is like. Would you kindly refer me to that outside person who prepares the form so that I can speak with them about that experience? (GET REFERRAL. THEN CALL THAT PERSON AND CONSIDER THEM TO BE YOUR FINAL RESPONDENT FOR THIS COMPANY, INTRODUCE YOURSELF AND CONTINUE WITH...) **Hello, I'm** (INTERVIEWER NAME) **of Russell Research in New York, an independent national survey research firm. The Internal Revenue Service has asked us to conduct a survey about the preparation and filing of Federal Tax Form 2290. Mr./Ms.** (NAME OF FIRST RESPONDENT) **of** (NAME OF REFERRING COMPANY) **told me that you're the person who actually prepares this form for his/her company. Would you be willing to take 15 minutes to participate in this survey?** (IF "YES", GO TO Q1 & CONTINUE. IF "NO", THANK, TERM, TALLY & SEE SUPERVISOR.)

1	2	3	4	5	6	7	8	9
---	---	---	---	---	---	---	---	---

...37

NOTE: IN THE QUESTIONS THAT FOLLOW, ALTERNATIVE LANGUAGE IS PROVIDED (IN PARENTHESES) FOR USE IN THE CASE OF ANY REFERRAL TO AN EXTERNAL/OUTSIDE PREPARER. IN THOSE CASES, YOU WILL BE TALKING TO THE RESPONDENT ABOUT HIS/HER PREPARATION OF FORM 2290 ON BEHALF OF THE CLIENT COMPANY THAT YOU CALLED ORIGINALLY. SO, WHEN INTERVIEWING THESE EXTERNAL PREPARERS, BE SURE TO USE THE LANGUAGE PROVIDED IN PARENTHESES.

IF RESPONDENT COMPANY ORIGINATED FROM THE "USER" LIST, CONTINUE NEXT WITH Qs 1-22, PAGES 4-8. IF RESPONDENT COMPANY ORIGINATED FROM THE "NON-USER" LIST, SKIP NOW TO Qs 23-32, PAGES 9-12. THEN, ALL RESPONDENTS ARE ASKED THE REMAINING QUESTIONS ON PAGE 12.

2290 e-file USER

READ: From our previous questions and records, we see that your company (your client's company) did indeed e-file or electronically file its Form 2290 in 2008. The IRS is trying to improve a number of its business tax filing products and services and your input on Form 2290 will help them focus their efforts on these Federal business tax forms. Let me ask you a few questions about e-filing Form 2290 for (INSERT COMPANY NAME). And for the purposes of this survey, we'd like you think only of the Form 2290 that your (your client's) company e-filed in 2008.

NOTE: WE'VE USED "2008" AS THE REFERENCE YEAR SINCE THE LISTS FOR THIS STUDY WILL BE DRAWN IN JANUARY/FEBRUARY FOR MARCH-APRIL-MAY FIELDWORK.

ASK ALL FORM 2290 E-FILE USERS:

Q1. Overall, how satisfied are you with e-file as a method of filing your (your client's) Form 2290? Would you say you are... (READ CHOICES & CIRCLE ONE ANSWER BELOW.)

- Very Satisfied.....4 ...00
- Somewhat Satisfied.....3
- Somewhat Dissatisfied.....2
- Or Very Dissatisfied.....1
- (DON'T READ, BUT CIRCLE IF...) Don't Know/Refused.....y

Q2. What specifically makes you say that? (ENTER RESPONSES VERBATIM BELOW & PROBE UNTIL RESPONSE IS EXHAUSTED.)

(PROBE FURTHER WITH:) **Anything else?** _____
WHEN PROBING, ASK RESPONDENT TO BE SPECIFIC AS POSSIBLE. DO NOT STOP AT GENERAL ANSWERS.

Q3. In your opinion, can e-file be improved as a method of filing Form 2290? (CIRCLE ONE ANSWER.)

- Yes (ASK Q4 NEXT).....1 ...00
- No (SKIP TO Q5 NEXT).....2
- (DON'T READ...) Don't Know/Refused (SKIP TO Q5 NEXT).....y

Q4. (IF "YES" TO Q3, ASK...) In what specific ways can it be improved? (ENTER VERBATIM & PROBE.)

(PROBE FURTHER WITH:) **Anything else?** _____

ASK ALL FORM 2290 E-FILE USERS:

Q5. Please rate how satisfied you are with Form 2290 e-file in terms of each of the following characteristics. For each characteristic, please tell me if you were "very satisfied", "somewhat satisfied", "somewhat dissatisfied", or "very dissatisfied". Let's start with...(START AT PRE-CHECK, READ CHARACTERISTIC, CIRCLE ONE RATING PER CHARACTERISTIC AND THEN CONTINUE UNTIL THIS METHOD HAS BEEN RATED ON ALL CHARACTERISTICS.) (NOTE: DO NOT OFFER "DON'T KNOW"/"CAN'T SAY" AS A CHOICE BUT CIRCLE IT IF RESPONDENT CANNOT RATE THE CHARACTERISTIC.)

	Very Satisfied	Some-what Satisfied	Some-what Dissatisfied	Very Dissatisfied	DK/ Can't Say	
<input type="checkbox"/> Compared to paper filing of Form 2290.....	4	3	2	1	y	...00
<input type="checkbox"/> Being a time-saver for you.....	4	3	2	1	y	...00
<input type="checkbox"/> Being a more accurate way to file Form 2290.....	4	3	2	1	y	...00
<input type="checkbox"/> Being a private and secure way to file Form 2290.....	4	3	2	1	y	...00
<input type="checkbox"/> Being an inexpensive method of filing Form 2290.....	4	3	2	1	y	...00
<input type="checkbox"/> Being easy to use, with little hassle.....	4	3	2	1	y	...00
<input type="checkbox"/> Being paperless.....	4	3	2	1	y	...00
<input type="checkbox"/> Being easy to learn.....	4	3	2	1	y	...00
<input type="checkbox"/> Reducing filing and transcription errors.....	4	3	2	1	y	...00
<input type="checkbox"/> Allowing the necessary schedules and attachments.....	4	3	2	1	y	...00
<input type="checkbox"/> Providing fast acknowledgment of receipt of Form 2290.....	4	3	2	1	y	...00
<input type="checkbox"/> Providing receipt of electronic Schedule 1.....	4	3	2	1	y	...00
<input type="checkbox"/> Providing easy-to-use signature options - either scanning a signature into a PDF file or a PIN Number	4	3	2	1	y	...00
<input type="checkbox"/> Paying the balance due electronically with the return.....	4	3	2	1	y	...00
<input type="checkbox"/> Making tax filing easier.....	4	3	2	1	y	...00
<input type="checkbox"/> Being the most convenient way to file this Form.....	4	3	2	1	y	...00

Q6. As you probably know, you have to present Schedule 1 of Form 2290 to your state DMV (or Department of Motor Vehicles), when you register a truck in a state. Have you ever had a problem with a state DMV refusing to accept your Schedule 1? (CIRCLE ONE ANSWER.)

Yes (ASK Q7).....	1	...00
No (SKIP TO Q8).....	2	
(DON'T READ...) Don't Recall/Refused (SKIP TO Q8)....	y	

Q7. (IF "YES" TO Q6, ASK...) In what specific state or states did you have the problem of a DMV refusing to accept your Schedule 1? (ENTER ALL STATES THAT APPLY BELOW.)

ASK ALL FORM 2290 E-FILE USERS:

Q8. On a different topic, have you ever received any type of notice after filing Form 2290 electronically? (CIRCLE ONE ANSWER.)

Yes (ASK Q9 NEXT).....1 ...00
No (SKIP TO Q14 NEXT)..... 2
(DON'T READ...) Don't Recall/Refused (SKIP TO Q14 NEXT) y

IF YES TO Q8, ASK:

Q9. Which of the following best describes the last such notice that you received? Was it...(READ CHOICES AND CIRCLE ONLY ONE ANSWER.)

00 An Acknowledgement Of Receipt That You Received From A Return Transmitter 1
A Math Error Or Balance-Due Notice..... 2
A Notice Regarding A Payment.....3
(DON'T READ...) Don't Recall/Refused.....y

NOTE TO RUSSELL STAFF/TAB: TABULATE DATA FROM Qs 10-13 BY TYPE OF NOTICE MENTIONED IN Q9.

Q10. Thinking more about the last such notice you received, was the notice clear and understandable? (CIRCLE ONE ANSWER.)

Yes (SKIP TO Q12 NEXT).....1 ...00
No (ASK Q11 NEXT)..... 2
(DON'T READ...) Don't Recall/Refused (SKIP TO Q12 NEXT) y

Q11. (IF "NO" TO Q10, ASK...) What was unclear or hard to understand about the notice? (ENTER VERBATIM & PROBE.)

(PROBE FURTHER WITH:) Anything else?_____

ASK ALL 2290 E-FILE USERS WHO SAID "YES" TO Q8:

Q12. Did you contact the IRS after receiving the notice? (CIRCLE ONE ANSWER.)

Yes (ASK Q13 NEXT).....1 ...00
No (SKIP TO Q14)..... 2
(DON'T READ...) Don't Recall/Refused (SKIP TO Q14)..y

IF YES TO Q12, ASK Q13. OTHERWISE, SKIP TO Q14:

Q13. How did you feel about the timeliness of the IRS' response to your inquiry regarding this notice? Was it...(CIRCLE ANSWER.)

About Right.....1 ...00
Or, Did It Take Too Long.....2
(DON'T READ...) Don't Know/Refused.....y

ASK ALL FORM 2290 E-FILE USERS:

Q14. When you electronically submit a Form 2290 that requires payment of taxes, how do you typically pay the taxes owed? Do you pay through...(CIRCLE ONLY ONE ANSWER.)

Electronic Funds Withdrawal or EFW.....1 ...00
The Electronic Federal Tax Payment System or EFTPS..... 2
Or Through Some Other Method (SPECIFY)_____3
(DON'T READ...) Don't Recall/Refused.....y

Q15. Do you recall ever seeing any information or communication from the IRS related to electronic filing of Form 2290? (CIRCLE ONE ANSWER.)

- Yes (ASK Qs 16-19)..... 1 ...00
- No (SKIP TO Q20)..... 2
- (DON'T READ...) Don't Recall/Refused (SKIP TO Q20)..y

IF YES TO Q15, ASK Qs 16-19. OTHERWISE, SKIP TO Q20:

Q16. Which if any of the following types of information relating specifically to Form 2290 e-file do you recall seeing? (CIRCLE ALL THAT APPLY BELOW.)

- IRS Forms..... 1 ...00
- IRS Publications..... 2
- IRS Instructions..... 3
- IRS Marketing Brochures..... 4
- Newspaper Or Magazine Ads..... 5
- Information at the IRS's website - irs.gov..... 6
- Information From Other Internet Websites..... 7
- Information From Software Companies..... 8
- Information From An IRS Tax Specialist/IRS Employee..... 9
- Letter From The IRS..... 0
- Some Other Type Of Information (SPECIFY)_____x
- (DON'T READ...) Can't Recall Type.....y

Q17. Overall, how helpful to you in using Form 2290 e-file was this information that you just mentioned? Was it...(READ CHOICES & CIRCLE ONE ANSWER BELOW.)

- Very Helpful..... 1 ...00
- Somewhat Helpful..... 2
- Not Very Helpful..... 3
- Or, Not At All Helpful..... 4
- (DON'T READ, BUT CIRCLE IF...) Don't Know/Refused.....y

Q18. In what ways was the information you mentioned above helpful or not helpful to you in filing Form 2290? (ENTER RESPONSES VERBATIM BELOW & PROBE UNTIL RESPONSE IS EXHAUSTED.)

(PROBE FURTHER WITH:) **Anything else?** _____
WHEN PROBING, ASK RESPONDENT TO BE SPECIFIC AS POSSIBLE. DO NOT STOP AT GENERAL ANSWERS.

Q19. How did you receive the information you just mentioned? Was it... (READ CHOICES & CIRCLE ALL THAT APPLY BELOW.)

- In The Mail..... 1 ...43
- Picked Up At Post Office/Library..... 2
- Picked Up At An IRS Office..... 3
- From Contact With An IRS Tax Specialist/IRS Employee..... 4
- From The IRS's Website - irs.gov..... 5
- From Other Internet Websites (SPECIFY)_____ 6
- Via e-mail..... 6
- Via Electronic Bulletin Board..... 7
- From Advertising..... 8
- From News Articles..... 9
- From Software Companies..... 0
- Other (SPECIFY)_____x
- (DON'T READ...) Don't Know/Refusedy

ASK ALL FORM 2290 E-FILE USERS:

Q20. If the IRS were to send you information or updates about Form 2290 in the future, how would you prefer to receive this information? Should it come to you through... (READ CHOICES & CIRCLE ALL THAT APPLY BELOW.)

- In The Mail..... 1 ...43
- Pick(ed) Up At Post Office/Library..... 2
- Pick(ed) Up At An IRS Office..... 3
- From Contact With An IRS Tax Specialist/IRS Employee..... 4
- From The IRS's Website - irs.gov..... 5
- From Other Internet Websites (SPECIFY)_____ 6
- Via e-mail..... 6
- Via Electronic Bulletin Board..... 7
- From Advertising..... 8
- From News Articles..... 9
- From Software Companies..... 0
- Other (SPECIFY)_____ x
- (DON'T READ...) Don't Know/Refused y

Q21. Would you recommend e-filing as a method of filing Form 2290? (CIRCLE ONE ANSWER.)

- Yes..... 1 ...00
- No..... 2
- (DON'T READ...) Don't Recall/Refused..... y

Q22. Why do you say that? (ENTER RESPONSES VERBATIM BELOW & PROBE UNTIL RESPONSE IS EXHAUSTED.)

(PROBE FURTHER WITH:) **Anything else?**
WHEN PROBING, ASK RESPONDENT TO BE SPECIFIC AS POSSIBLE. DO NOT STOP AT GENERAL ANSWERS.

2290 e-file NON-USER

ASK ALL FORM 2290 E-FILE NON-USERS:

Q23. Our records show that (INSERT COMPANY NAME) **was eligible to file last year's Form 2290 electronically, but that you used the paper filing method. Were you aware that you could have filed Form 2290 electronically?** (CIRCLE ONE ANSWER BELOW.)

- Yes..... 1 ...00
- No..... 2

Q24. Do you use a software package to prepare Form 2290 for (INSERT COMPANY NAME)? (CIRCLE ONE ANSWER BELOW.)

- Yes (ASK Q25 NEXT)..... 1 ...00
- No (SKIP TO "READ" ABOVE CONCEPT BELOW)..... 2

IF "YES" TO 24, ASK:

Q25. Does your software package for preparing Form 2290 offer an electronic filing option? (CIRCLE ONE ANSWER BELOW.)

- Yes (SKIP TO "READ" ABOVE CONCEPT BELOW)..... 1 ...00
- No (ASK Q26)..... 2
- Don't Know (ASK Q26, BUT USE ALTERNATIVE WORDING IN PARENS)..... 3

IF "NO" (OR "DON'T KNOW") TO 25, ASK:

Q26. You say your software package for preparing Form 2290 does not offer an electronic filing option. (IF "DON'T KNOW" TO Q25: You say you don't know if your software package for preparing Form 2290 offers an electronic filing option.) Would you like it to? (CIRCLE ONE ANSWER BELOW.)

- Yes (THEN GO TO "READ" ABOVE CONCEPT BELOW)..... 1 ...00
- No (THEN GO TO "READ" ABOVE CONCEPT BELOW)..... 2

READ TO ALL FORM 2290 E-FILE NON-USERS:

READ: Please listen carefully as I describe electronic filing of Form 2290. I'll read the description twice just to make sure it's clear. (READ THE FOLLOWING DESCRIPTION SLOWLY AND THEN READ IT A SECOND TIME, PAUSING BETWEEN TO SAY "Let me read this again.")

The Form 2290 MeF Program provides Taxpayers or their Tax Preparers the option to prepare and transmit Form 2290, Heavy Highway Vehicle Use Tax, electronically.

Filing Form 2290 electronically is convenient, fast, accurate and a safe way to file your return. It allows Taxpayers or their Tax Preparers to file the return and receive their Schedule 1 electronically and be assured of a secure transmission and fast acknowledgement of IRS receipt of the electronic return.

Form 8453-EX, Signature Document, is required when filing the return electronically. The form can also be scanned into a PDF file and transmitted to IRS. When using an Electronic Return Originator, Taxpayers may sign the return electronically by using a Practitioner Pin. Form 8879-EX, Signature Document, is required when using this method.

In addition, payments may be made electronically using an electronic funds withdrawal, or using the Electronic Federal Tax Payment System (EFTPS).

ASK ALL FORM 2290 E-FILE NON-USERS:

Q27. Based upon everything you now know about it, how likely are you to file Form 2290 electronically in the future? Are you... (READ CHOICES AND CIRCLE ONE ANSWER.)

- Very Likely.....4 ...00
- Somewhat Likely.....3
- Not Very Likely.....2
- Or Not At all Likely to use this method of filing the Form.....1
- (DON'T READ, BUT CIRCLE IF...) Don't Know/Refused.....y

Q28. Based upon what you now know, please tell me whether you “agree completely”, “agree somewhat”, “disagree somewhat”, or “disagree completely” with each of the following statements about electronic filing of Form 2290. Let’s start with... (START AT PRE-CHECK, READ CHARACTERISTIC, CIRCLE ONE RATING PER CHARACTERISTIC AND THEN CONTINUE UNTIL THIS METHOD HAS BEEN RATED ON ALL CHARACTERISTICS.) (NOTE: DO NOT OFFER “DON'T KNOW”/“CAN'T SAY” AS A CHOICE BUT CIRCLE IT IF RESPONDENT CANNOT RATE THE CHARACTERISTIC.)

Agree Agree Disagree Disagree DK/
 Completely Somewhat Somewhat Completely Can't Say

- Would be better than other ways of filing Form 2290.....4 3 2 1 y ...00
- Would be a time-saver for you.....4 3 2 1 y ...00
- Would be a more accurate way to file Form 2290.....4 3 2 1 y ...00
- Would be a private and secure way to file Form 2290.....4 3 2 1 y ...00
- Would be an inexpensive method of filing Form 2290.....4 3 2 1 y ...00
- Would be easy to use, with little hassle.....4 3 2 1 y ...00
- Would be paper-less.....4 3 2 1 y ...00
- Would be easy to learn.....4 3 2 1 y ...00
- Would reduce filing and transcription errors.....4 3 2 1 y ...00
- Would allow the necessary schedules and attachments.....4 3 2 1 y ...00
- Would provide fast acknowledgment of receipt of Form 2290 4 3 2 1 y ...00
- Would provide receipt of electronic Schedule 1.....4 3 2 1 y ...00
- Would provide easy-to-use signature options -
 either scanning a signature into a PDF file or a PIN Number4 3 2 1 y ...00
- Can pay the balance due electronically with the return.....4 3 2 1 y ...00
- Would make tax filing easier.....4 3 2 1 y ...00
- Would be the most convenient way to file Form 2290.....4 3 2 1 y ...00

Q29. Thinking of the Form 2290 that you filed last year for your (your client's) company, what reservations did you have about filing electronically that caused you to choose to file via paper? (DO NOT READ CHOICES. CIRCLE ALL THAT APPLY IF PRE-LISTED UNDER COLUMN 29. IF RESPONSE(S) NOT PRE-LISTED, THEN ENTER VERBATIM IN THE SPACE PROVIDED. NOTE: ALWAYS FOLLOW THE PROBE INSTRUCTIONS BUILT INTO THE RESPONSE LIST.)

Q30. Let me read some possible reasons why you may not have filed Form 2290 electronically last year for (INSERT COMPANY NAME). Please tell me if any of these were reasons you did not file Form 2290 electronically last year. (READ CHOICES NOT CIRCLED IN COL. 29 & CIRCLE ANSWERS IN COL. 30. WHEN READING A RESPONSE POINT, START WITH THE PRE-CHECKED SET OF ISSUES AND SUBSTITUTE "YOU", "YOUR", ETC. FOR "WE", "OUR", ETC. AGAIN, USE THE BUILT-IN PROBES.)

	(Q29)	(Q30)	
	Unaided	Aided	
<input type="checkbox"/> Software Issues:			
We don't have the software to file this Form electronically.....	1	1	...00
The software costs too much.....	2	2	
▪ We have the software, but it's just too difficult to use.....	3	3	
▪ We can prepare the Form using our software, but can't transmit it directly to the IRS...	4	4	
▪ We can't prepare Form 2290 electronically using our software / our software doesn't support it			5
▪ Our software doesn't allow us to attach specific Schedules/Attachments that we need to attach	6	6	
(IF ABOVE CIRCLED, PROBE FOR WHICH SCHEDULES/ATTACHMENTS:) _____	x	x	...00
_____	x	x	...00
▪ Our software doesn't allow us to attach as many specific Schedules/Attachments that we need to			7
(IF ABOVE CIRCLED, PROBE FOR WHICH SCHEDULES/ATTACHMENTS:) _____	x	x	...00
_____	x	x	...00
▪ Our software doesn't allow us to attach other supporting documents that we want to attach	8	8	
(IF ABOVE CIRCLED, PROBE FOR WHICH SCHEDULES/ATTACHMENTS:) _____	x	x	...00
_____	x	x	...00
▪ Our software doesn't allow us to attach some documents for Federal and others for State returns			9
(IF ABOVE CIRCLED, PROBE FOR WHICH SCHEDULES/ATTACHMENTS:) _____	x	x	...00
_____	x	x	...00
IF ANY OF THE BULLETED "SOFTWARE ISSUES" CIRCLED ABOVE, ASK FOLLOWUP & ENTER BRAND:			
▪ What software package are you using for Form 2290? _____	x	x	...00
<input type="checkbox"/> Transmission Issues (Netted With Punch 4 Above):			
We can prepare the Form using our software, but cannot transmit it using our software.....	1	1	...00
We can prepare the Form using our software, but we don't know how to transmit it.....	2	2	
It costs too much to transmit the Form through third parties.....	3	3	
<input type="checkbox"/> Not Yet Comfortable With/Don't Trust e-filing This Form:			
We don't know enough yet about electronically filing of this Form.....	1	1	...00
We don't trust the technology for Form 2290 yet - it hasn't been around long enough.....	2	2	
We are not sure that the system or the technology is secure enough yet.....	3	3	
Too much can go wrong in electronically filing this Form - it's easier to just file it by Paper	4	4	
<input type="checkbox"/> No Interest/No Need/Too Much Work:			
We are just not interested in using electronic filing for Form 2290.....	1	1	...00
It's just too much work to convert over to electronic filing for this Form.....	2	2	
It's just something else we'd have to learn and we don't have time.....	3	3	
We don't have to/are not mandated to file this Form electronically, so we don't.....	4	4	
Requirements for electronic filing of 2290s are different from other forms/returns & too much trouble			5
Others: (SAVE UNTIL LAST & ENTER VERBATIM) _____	x	x	
You just didn't know about (or know enough about) electronic filing of Form 2290.....	y	y	

Q31. Is there anything the IRS can do to increase the likelihood that you will file Form 2290 electronically for (INSERT COMPANY NAME) in the future? (ENTER VERBATIM & PROBE.)

(PROBE FURTHER WITH:) **Anything else?** _____

Q32. If the IRS were to send you information or updates about Form 2290 in the future, how would you prefer to receive this information? Should it come to you through... (READ CHOICES & CIRCLE ALL THAT APPLY BELOW.)

- In The Mail..... 1 ...43
- Pick(ed) Up At Post Office/Library..... 2
- Pick(ed) Up At An IRS Office..... 3
- From Contact With An IRS Tax Specialist/IRS Employee..... 4
- From The IRS’s Website - irs.gov..... 5
- From Other Internet Websites (SPECIFY)_____ 6
- Via e-mail..... 6
- Via Electronic Bulletin Board..... 7
- From Advertising..... 8
- From News Articles..... 9
- From Software Companies..... 0
- Other (SPECIFY)_____ x
- (DON'T READ...) Don't Know/Refused y

**Remaining Questions Asked
of BOTH Users and Non-Users**

ASK ALL USERS A-N-D NON-USERS:

Q33. Do you (or your client’s firm) have an Internet connection? (CIRCLE...)

- Yes..... 1 ...00
- No..... 2

IF RESPONDENT IS AN “OUTSIDE TAX PROFESSIONAL/ACCOUNTANT/CPA” (O. “B”, Page 2), ASK Qs 34-35. IF RESPONDENT IS not AN “OUTSIDE TAX PRO/ACCT/CPA”, SKIP TO “CLOSING COMMENTS”.

Q34. Are you... (READ & CIRCLE.) A CPA.....1 An Accountant2 A Tax Professional.....3 ...00
Lawyer.....4 Other.....x

Q35. We learned earlier that you’re an outside professional who files Form 2290 for this company. What is your title within your own company or organization?

TITLE _____

FOR ALL - CLOSING COMMENTS

That completes the survey. We are required by law to provide you with the OMB (Office Of Management and Budget) Control Number for this public information request. That number is 1545-1432. In addition, if you have any comments about the time estimate to complete the survey or ways to improve the survey, you may write to the IRS. Would you like the address? (IF YES, ADDRESS IS...) Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224.

