

Benchmark survey

Taxpayer Opinion Survey

1. There are many tax resources and services individuals can use to help them complete their tax return. From the following list, please check the resources and services you are aware of. (Choose all that apply.)

IRS forms and instruction booklets
IRS website (www.irs.gov)
IRS Tax Assistance Centers (walk-in sites)
Automated IRS phone system
IRS phone representatives
Email with the IRS
Written correspondence with the IRS (other than email)
IRS Kiosk (similar to an ATM)
Volunteer tax preparation clinics
Tax preparation company
Non-IRS books and publications
Personal accountant/bookkeeper
Tax preparation software
Internet websites (other than the IRS website)
I am not aware of any of these resources and services

2. Which of the following tax resources and services, if any, did you use when completing your 2008 tax return? (Choose all that apply.)

IRS forms and instruction booklets
IRS website (www.irs.gov)
IRS Tax Assistance Centers (walk-in sites)
Automated IRS phone system
IRS phone representatives
Email with the IRS
Written correspondence with the IRS (other than email)
IRS Kiosk (similar to an ATM)
Volunteer tax preparation clinics
Tax preparation company
Non-IRS books and publications
Personal accountant/bookkeeper
Tax preparation software
Internet websites (other than the IRS website)
I did not use any of the above resources or services.
Not applicable. I was not required to file a 2008 tax return.

3. If you could use only one of the following tax resources or services to complete your tax return, which would you choose? (Please choose only one response.)

IRS website (www.irs.gov)
IRS Tax Assistance Centers (walk-in sites)
Automated IRS phone system
IRS phone representatives
Email with the IRS
Written correspondence with the IRS (other than email)
IRS Kiosk (similar to an ATM)
Volunteer tax preparation clinics
Tax preparation company

Non-IRS books and publications
Personal accountant/bookkeeper
Tax preparation software
Internet websites (other than the IRS website)
I would not use any of the above resources or services.

4. Over the past two years, which of the following resources have you used to find information about investing or saving? (Choose all that apply.)

Financial institutions (Bank, Savings and Loan, etc.)
Financial magazines
Financial websites
Financial software
Financial advisors
Family, friends, or neighbors
News or business websites
Other resources
I do not use resources to find information about investing or saving.
Not applicable. I do not invest or save.

5. Over the past two years, which of the following resources have you used before making a large purchase (such as a television, washer and dryer, or refrigerator)? (Choose all that apply.)

Product website
Product literature
Store website
Online consumer reviews
Store mailer/advertisement
Family, friends, or neighbors
Magazines
News reports
Store clerk
I have not used any of the above resources.
Not applicable. I have not made any large purchases in the past two years.

6. How would you like to receive information about tax law changes such as new deductions or changes in filing requirements? (Choose all that apply.)

IRS publications
IRS written correspondence
IRS website (www.irs.gov)
Email
Television
Radio
Magazines
Newspapers
Tax preparation company
Accountant/bookkeeper
Tax preparation software
Volunteer tax preparation clinics
Non-IRS books and publications
Other

7. How do you usually access the Internet at home?

A telephone modem

- A cable modem
- A DSL modem
- A wireless device (PDA, cell phone, etc.)
- Don't know
- Not Applicable. I do not access the Internet at home.

For questions 8 through 14, we are interested in knowing if you would consider using a certain tax service in the future to perform a variety of tax-related activities.

8. In the future, which of the following would you perform using the IRS website (www.irs.gov)? (Choose all that apply.)

- Get an IRS form or publication
- Find an answer to a tax law question
- Get help preparing a tax return or form
- Determine my eligibility for a tax benefit or whether certain requirements apply to me
- Get help making tax-related calculations
- File a tax return or form
- Set up a payment plan
- Make a payment
- Get information about a refund
- Respond to a notice or letter received from the IRS
- None. I would not complete any of these activities using the IRS website.

9. In the future, which of the following would you perform by emailing the IRS? (Choose all that apply.)

- Get an IRS form or publication
- Get information about completing a tax form
- Find an answer to a tax law question
- Get help preparing a tax return or form
- File a tax return or form
- Set up a payment plan

10. In the future, which of the following would you perform using an IRS Taxpayer Assistance Center (walk-in site)? (Choose all that apply.)

- Get an IRS form or publication
- Get information about completing a tax form
- Find an answer to a tax law question
- Get help preparing a tax return or form
- Determine my eligibility for a tax benefit or whether certain requirements apply to me
- Get help making tax-related calculations
- File a tax return or form
- Set up a payment plan
- Make a payment
- Get information about a refund
- Respond to a notice or letter received from the IRS
- None. I would not complete any of these activities using an IRS Taxpayer Assistance Center.

11. In the future, which of the following would you perform using the IRS automated telephone system? (Choose all that apply.)

- Get an IRS form or publication
- Get information about completing a tax form
- Find an answer to a tax law question
- Get help preparing a tax return or form

Determine my eligibility for a tax benefit or whether certain requirements apply to me
Get help making tax-related calculations

File a tax return or form
Set up a payment plan
Make a payment
Get information about a refund
Respond to a notice or letter received from the IRS
None. I would not complete any of these activities using the IRS automated telephone system.
Make a payment
Get information about a refund
Respond to a notice or letter received from the IRS
None. I would not complete any of these activities using email with the IRS.

12. In the future, which of the following would you perform using written correspondence through the mail with the IRS? (Choose all that apply.)

Get an IRS form or publication
Get information about completing a tax form
Find an answer to a tax law question
Determine my eligibility for a tax benefit or whether certain requirements apply to me
Get help making tax-related calculations
File a tax return or form
Set up a payment plan
Make a payment
Get information about a refund
Respond to a notice or letter received from the IRS
None. I would not complete any of these activities using written correspondence with the IRS.

13. In the future, which of the following would you perform at a volunteer tax preparation clinic? (Choose all that apply.)

Get an IRS form or publication
Get information about completing a tax form
Find an answer to a tax law question
Determine my eligibility for a tax benefit or whether certain requirements apply to me
Get help making tax-related calculations
Get help preparing a tax return or form
File a tax return or form
Set up a payment plan
Make a payment
Get information about a refund
Respond to a notice or letter received from the IRS
None. I would not complete any of these activities using a volunteer tax preparation clinic.

14. In the future, which of the following would you perform by speaking with an IRS phone representative? (Choose all that apply.)

Get an IRS form or publication
Get information about completing a tax form
Find an answer to a tax law question
Determine my eligibility for a tax benefit or whether certain requirements apply to me
Get help making tax-related calculations
Get help preparing a tax return or form
File a tax return or form
Set up a payment plan

- Make a payment
- Get information about a refund
- Respond to a notice or letter received from the IRS
- None. I would not complete any of these activities using an IRS phone representative.

15. How did you prepare your 2008 tax return? (Please choose only one response.)

- Self prepared- using written forms
- Self prepared- electronically filed
- Self prepared- free file
- Professionally prepared- using written forms
- Professionally prepared- electronically filed
- Volunteer tax preparation site (VITA)

16. Why did you complete your 2008 tax return using this preparation method? (Choose all that apply.)

- Ease of use
- Familiarity with method
- Cost effectiveness (i.e. method was affordable or free)
- To avoid making errors
- Other (please indicate): _____

17. Please indicate your level of satisfaction with each of the following IRS tax services.

	Very Satisfied	Somewhat Satisfied	Neither Satisfied or Dissatisfied	Somewhat Dissatisfied	Very Dissatisfied	Did Not Use
IRS forms and instruction booklets						
IRS Website (www.irs.gov)						
IRS Tax Assistance Centers (walk-in sites)						
Automated IRS phone system						
IRS phone representatives						
Email with the IRS						
IRS Kiosk (similar to an ATM)						

18. How easy or difficult was it for you to complete your 2008 tax return?

- Very easy
- Somewhat easy
- Neither easy or difficult
- Somewhat difficult
- Very difficult
- Not Applicable. Someone other than me completed my tax return.
- Not Applicable. I was not required to file a tax return in 2005.

19. Do you have any of the following long-lasting conditions? (Check all that apply.)

- Blindness
- Deafness
- Severe vision impairment
- Severe hearing impairment
- A condition that substantially limits physical abilities (such as walking or reaching)
- A condition that limits learning or remembering
- I do not have any of the above long-lasting conditions.

20. Please select the statement that best describes the language spoken in your household.

- English is the only language spoken
- English is the primary language spoken
- A language other than English is the primary language spoken

21. Please identify your highest completed level of education.

- Grade School
- Some High School
- High School /GED
- Trade School
- Some College
- Associate's Degree
- Bachelor's Degree
- Master's Degree
- Doctoral Degree
- Professional Degree (M.D., J.D.)

22. What is your employment status?

- Full time student
- Student, working full time
- Student, working part time
- Employed full time
- Employed part time
- Not employed, but looking for employment
- Not employed and not looking for employment
- Retired

23. Which of the following events have occurred to you, yourself, in the last 12 months? (Check all that apply.)

- Retired
- Bought a home
- Sold a home
- Moved
- Been laid off
- Changed jobs
- Bought a car
- Had/adopted a child
- Diagnosed with a serious illness
- Got married
- Got divorced
- None of these

Introductory pre-letter

<FIRSTNAME> <LASTNAME>
<ADDRESS>
<CITY>, <ST> <ZIP>

Department of the Treasury
Internal Revenue Service
401 W. Peachtree St NW
Mail Stop 16-WI
Atlanta, GA 30308

<MONTH> <DAY>, 2009

Dear XXXXXX,

The Internal Revenue Service (IRS) is working to offer better service to taxpayers. To find out how we can improve, we have prepared a short opinion survey to collect feedback from taxpayers about the resources and services they use.

You were sent this letter because, as a taxpayer, you were selected at random to participate. You should receive a short survey in about a week.

Your participation is voluntary. All answers will be kept anonymous and individual answers will not be reported. As such, survey responses will have no effect on individual tax accounts.

We really want to know about your experiences and opinions. The IRS is committed to making taxes easier for everyone. To help accomplish this, your input is very important.

Sincerely,

<Insert Scanned Signature>

Mark Pursley
Director
Wage and Investment Research
Internal Revenue Service

Survey introduction letter

<FIRSTNAME> <LASTNAME>
<ADDRESS>
<CITY>, <ST> <ZIP>

Department of the Treasury
Internal Revenue Service
401 W. Peachtree St NW
Mail Stop 16-WI
Atlanta, GA 30308

<MONTH> <DAY>, 2009

Dear XXXXX,

The Internal Revenue Service (IRS) is working to offer better service to taxpayers. We have prepared a short opinion survey to find out how we can improve and to collect feedback from taxpayers about the resources and services they use.

You were randomly selected to participate in the survey. We have enclosed a copy of the survey with this letter as well as instructions for completing the survey online. Your participation is voluntary.

You should know that all answers will be kept anonymous, individual answers will not be reported, and survey responses will have no effect on individual tax accounts. The survey is short and should take about 10 minutes to complete.

The IRS is committed to making taxes easier for everyone, and to help accomplish this, we would like your help. Your input is very important.

An envelope is enclosed for return of the survey, and the postage is already paid.

Thank you,

<Insert Scanned signature>

Mark Pursley
Director
Wage and Investment Research
Internal Revenue Service

Reminder card

<FIRSTNAME> <LASTNAME>
<ADDRESS>
<CITY>, <ST> <ZIP>

Department of the Treasury
Internal Revenue Service
401 W. Peachtree St NW
Mail Stop 12-WI
Atlanta, GA 30308

<MONTH> <DAY>, 2009

Dear <FIRSTNAME> <LASTNAME>,

Recently, we asked for your help with an opinion survey about taxpayer service. We really want to know about your experiences and opinions about the issues in the survey.

If you have already sent the survey back to us or completed it online, we thank you very much; please disregard this letter. If not, would you fill it out today? Another copy of the survey is enclosed. We have also included the directions for completing it online. Answering its questions using either method should take about 10 minutes.

Please have the adult age 18 or over in your household who is most familiar with your Federal Income Tax Return be the person to answer the questions. If someone else helped you, we still want to learn about your opinions.

Your answers and opinions will be kept completely anonymous. An envelope is enclosed for return of the survey and the postage is already paid.

Thank you very much for your help.

Sincerely,

<Insert Scanned Signature>

Mark Pursley
Director
Wage and Investment Research
Internal Revenue Service