

W&I 2009 TAX PROFESSIONALS SURVEY

The overall goal of this research is to help the IRS provide better service to you and your clients as a tax professional. The improved understanding of your relationships with taxpayers that we hope to gain with this survey will help the IRS provide you the information you need to provide service that is more efficient to your clients. You can help the IRS improve its service to you and other tax professionals by answering the questions below. This voluntary survey takes about 20 minutes to complete. Your responses will be held anonymous by the survey processing center and no identifying information will be provided to the IRS.

1. What type of tax professional are you? (select all that apply)

- Enrolled agent
- Certified Public Accountant
- Tax Attorney
- Other tax professional
- Don't know
- Refused

2. Approximately how many years have you been a tax professional?

_____ Years

3. What is your primary role in the firm in which you work?

- Management
- Tax preparer
- Accountant
- Lawyer
- Tax or financial planner
- Other _____

4. On a scale from one to five, where 1 is Not Important and 5 is Very Important, how important is each of the following considerations for your clients in making a decision to use your services?

	Very Important				Not Important	N/A Don't Know
	5	4	3	2	1	0
	▼	▼	▼	▼	▼	▼
A. Convenience	0	0	0	0	0	0
B. Trust	0	0	0	0	0	0
C. Familiarity	0	0	0	0	0	0
D. Accuracy	0	0	0	0	0	0
E. Speed	0	0	0	0	0	0
F. Maximum Refund	0	0	0	0	0	0
G. Cost	0	0	0	0	0	0
H. Tax Knowledge	0	0	0	0	0	0
I. Other _____	0	0	0	0	0	0

5. What languages besides English do you use to communicate with clients? Please choose all languages that apply.

- Spanish
- Chinese
- Vietnamese
- Russian
- American Sign Language
- Other _____
- Don't Know
- Refused

6. In the office where you work, approximately how many individual tax returns are prepared per year? _____

7. Approximately how many individual tax returns do you prepare for your clients per year? _____

8. On average, what percentage of your time on the job do you personally spend assisting your clients with tax matters? _____%

9. In an average year, what percentage of time do you spend on the following tax matters? Total should add up to 100%

	Percentage
Pre-filing (tax planning)	%
Preparation and Filing	%
Post-filing (correspondence, audits, etc.)	%
Other tax –related issues (please list)	%

ALL TAX MATTERS	100%

10. In the past 12 months, approximately what percentage of your clients’ returns was filed electronically? Your best estimate is fine. _____

11. On a scale from one to five, where 1 is Never and 5 is Always, how often do you rely on each of the following sources of tax information?

	Always 5	4	3	2	Never 1	N/A Don’t Know 0
	▼	▼	▼	▼	▼	▼
A. IRS website	<input type="radio"/>					
B. PPS phone line	<input type="radio"/>					
C. IRS toll free line	<input type="radio"/>					
D. Written correspondence with the IRS	<input type="radio"/>					
E. Email updates or newsletters from the IRS	<input type="radio"/>					
F. e-Services	<input type="radio"/>					
G. Publications	<input type="radio"/>					
H. Sources outside the IRS, including tax software and independent tax research firms	<input type="radio"/>					

Getting a Form or Publication

If you contacted the IRS in the past 12 months to *obtain a form or publication*, please answer the following questions:

If you contacted the IRS to <i>obtain a form or publication</i> :	Did you use this method to <i>obtain a form or publication</i> never, a little, somewhat, a lot, or always?					On a scale of 1 to 5, please rate your satisfaction with <i>obtaining a form or publication</i> using this method:				
	Never	A little	Somewhat	A lot	Always	1: Very dissatisfied	2	3	4	5: Very satisfied
IRS website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PPS phone line	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IRS toll free line	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e-Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Written correspondence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Getting Information about a Notice from the IRS

If you contacted the IRS in the past 12 months to *obtain information about a notice from the IRS*, please answer the following questions:

If you contacted the IRS to <i>obtain information about a notice from the IRS</i> :	Did you use this method to <i>obtain information about a notice from the IRS</i> never, a little, somewhat, a lot, or always?					On a scale of 1 to 5, please rate your satisfaction with <i>obtaining information about a notice from the IRS</i> using this method:				
	Never	A little	Somewhat	A lot	Always	1: Very dissatisfied	2	3	4	5: Very satisfied
IRS website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PPS phone line	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IRS toll free line	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e-Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Written correspondence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Getting Tax Return Preparation Guidance

If you contacted the IRS in the past 12 months to *get tax return preparation guidance*, please answer the following questions:

If you contacted the IRS to <i>get tax return preparation guidance</i> :	Did you use this method to <i>get tax return preparation guidance</i> never, a little, somewhat, a lot, or always?					On a scale of 1 to 5, please rate your satisfaction with <i>getting tax return preparation guidance</i> using this method:				
	Never	A little	Somewhat	A lot	Always	1: Very dissatisfied	2	3	4	5: Very satisfied
IRS website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PPS phone line	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IRS toll free line	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e-Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Written correspondence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Obtain Answers to Tax Law Questions

If you contacted the IRS in the past 12 months to *obtain answers to tax law questions*, please answer the following questions:

If you contacted the IRS to <i>obtain answers to tax law questions</i> :	Did you use this method to <i>obtain answers to tax law questions</i> never, a little, somewhat, a lot, or always?					On a scale of 1 to 5, please rate your satisfaction with <i>obtaining answers to tax law questions</i> using this method:				
	Never	A little	Somewhat	A lot	Always	1: Very dissatisfied	2	3	4	5: Very satisfied
IRS website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PPS phone line	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IRS toll free line	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e-Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Written correspondence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Getting Client Refund Information

If you contacted the IRS in the past 12 months to *get client refund information*, please answer the following questions:

If you contacted the IRS to <i>get client refund information</i> :	Did you use this method to <i>get client refund information</i> never, a little, somewhat, a lot, or always?					On a scale of 1 to 5, please rate your satisfaction with <i>getting client refund information</i> using this method:				
	Never	A little	Somewhat	A lot	Always	1: Very dissatisfied	2	3	4	5: Very satisfied
IRS website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PPS phone line	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IRS toll free line	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e-Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Written correspondence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Getting Prior Year Return Information

If you contacted the IRS in the past 12 months for *getting prior year return information*, please answer the following questions:

If you contacted the IRS to <i>get prior year return information</i> :	Did you use this method for <i>get prior year return information</i> never, a little, somewhat, a lot, or always?					On a scale of 1 to 5, please rate your satisfaction with <i>getting prior year return information</i> using this method:				
	Never	A little	Somewhat	A lot	Always	1: Very dissatisfied	2	3	4	5: Very satisfied
IRS website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PPS phone line	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IRS toll free line	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e-Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Written correspondence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Obtaining Information about Payments

If you contacted the IRS in the past 12 months to *obtain information about payments*, please answer the following questions:

If you contacted the IRS to <i>obtain information about payments</i> :	Did you use this method to <i>obtain information about payments</i> never, a little, somewhat, a lot, or always?					On a scale of 1 to 5, please rate your satisfaction with <i>obtaining information about payments</i> using this method:				
	Never	A little	Somewhat	A lot	Always	1: Very dissatisfied	2	3	4	5: Very satisfied
IRS website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PPS phone line	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IRS toll free line	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e-Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Written correspondence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Assisting Clients with Applying for a Taxpayer or Employer ID Number

If you contacted the IRS in the past 12 months to *assist clients with applying for a taxpayer or Employer ID Number*, please answer the following questions:

If you contacted the IRS to <i>assist clients with applying for a taxpayer or Employer ID Number</i> :	Did you use this method to <i>assist clients with applying for a taxpayer or Employer ID Number</i> never, a little, somewhat, a lot, or always?					On a scale of 1 to 5, please rate your satisfaction with <i>assist clients with applying for a taxpayer or Employer ID Number</i> using this method:				
	Never	A little	Somewhat	A lot	Always	1: Very dissatisfied	2	3	4	5: Very satisfied
IRS website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PPS phone line	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IRS toll free line	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e-Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Written correspondence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

These next few questions are for classification purposes. Again, the information you provide is completely anonymous.

12. Are you a sole proprietor?

- Yes
- No
- Refused

13. Approximately how many employees are in your firm?

- _____ Employees
- Not sure
 - Refused

14. Which of the following describes the firm in which you work as a tax professional?

- National tax preparation firm
- Other tax preparation firm (including self-employed/sole practitioner)
- National accounting and/or law firm
- Other accounting and/or law firm
- Don't know
- Refused

[Ask only if Q18 = A]

15. Which national tax preparation firm do you work for?

- HR Block
- Jackson Hewitt
- Liberty Tax Service
- Other (please specify)
- Refused

16. Please describe your work status as a tax professional.

- Full time, year round
- Full time, seasonal
- Part time, year round
- Part time, seasonal
- Don't know
- Refused

17. How do you charge most of your clients?

- An hourly fee
- A fee per return or service
- A flat fee or retainer
- Other (please specify)
- Not sure
- Refused

18. How often do you interact with most of your clients?

- Once or twice per year
- Three or four times per year
- More often than four times a year
- Not sure
- Refused

19. What is your education level?

- High school graduate
- Some college
- Technical school/degree
- College degree
- Some post-graduate work
- Graduate or terminal degree

The last few questions are intended to gather your thoughts regarding potential IRS service improvements.

20. Which of the following services would be the most valuable in allowing you to better serve your clients:

- Provide taxpayer notices electronically
- Provide secure email interaction with the IRS
- Enhance eServices by adding features that would allow access to client notices and resolution of notices.
- Other (please specify) _____

21. Do you feel that these services would facilitate your and your clients' compliance with the tax code?

- Electronic taxpayer notices
- Secure email interaction with the IRS
- Enhanced eServices features that would allow access to client notices and resolution of notices.

22. Are there any other services the IRS could offer to you and other tax professionals to reduce burden to you and your clients?

23. Are there any other services the IRS could offer to you and other tax professionals to facilitate service to your clients and enhance tax compliance?

If you have any questions about this survey, please contact the survey processing center at 1-866-287-5762 or at irs.wi.mp@mmail.macrointernational.com.

Paperwork Reduction Act Notice

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is 1545-1432. 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, 1111 Constitution Ave. NW, Washington, DC 20224.

**Thank you for your participation in this survey. We appreciate your feedback!
Please return this questionnaire by mail using the enclosed business return envelope.**