

2009 Tax Forum Customer Satisfaction Survey

Default to **location** based on dates

- July 7-9: Las Vegas
- July 14-16: San Diego
- August 4-6: Orlando
- August 25-27: NYC
- September 8-10: Dallas
- September 22-24: Atlanta

1. Profession (check all that apply):

- Electronic Return Originator
- Software Developer
- Reporting Agent
- Transmitter
- Intermediate Service Provider
- Financial Institution
- Tax Preparer
- Circular 230 Participant
 - o Enrolled Agent
 - o Certified Public Accountant
 - o Attorney
- Other _____

2. What assistance did you receive in the e-IRS Room today? (check all that apply)

- Submitted a new IRS *e-file* Application
- Updated an existing IRS *e-file* Application
- Got fingerprinted or submitted professional credentials
- Created a username and password to access e-services
- Reset your e-services password
- Applied for a Preparer Tax Identification Number (PTIN) online
- Signed up for Quick Alerts
- Applied for an Employer Identification Number (EIN)
- Applied to be an Individual Tax Identification Number (ITIN) Acceptance Agent
- Applied to file information returns through the Filing Information Returns Electronically (FIRE) system
- Answers to *e-file* questions
- Other: _____

3. Did you know about these services prior to visiting the e-IRS Room today?

- Yes
- No

4. Did you attempt to complete the task(s) prior to visiting the e-IRS Room today?

- No
- Yes

- o **How did you attempt to complete the task(s) before today?** (check all that apply)
 - Visited www.irs.gov
 - E-mailed the IRS
 - Called the IRS
 - o e-help Desk
 - o Practitioner Priority Services
 - o Other
 - Postal mail
 - Asked a friend or colleague
 - Other _____

5. What was your overall level of satisfaction with the service(s) you received in the e-IRS Room today?

(Radio buttons) Scale of 1 to 5

6. Is this your first tax forum?

- Yes
- No
 - o How many others have you attended? _____

7. How can we improve the e-IRS Room?

8. Have you ever contacted the e-help Desk?

- Yes
 - o If yes, was your contact by telephone, e-mail or postal mail?
 - Telephone
 - E-mail
 - Postal mail
- No (skip to question 10)

9. Thinking back to your most recent contact with the e-help Desk, how would you rate your overall level of satisfaction with the service(s) you received?

Scale of 1 to 5

10. What is your preferred method of communication with the e-help Desk?

- Telephone
- E-mail
- Postal mail
- Web chat (if available)

11. Your opinion is very valuable to us. Please tell us how we can improve e-help Desk services. _____

12. Are you a registered user of e-services?

- Yes

- o As a registered user of e-services, what e-services product(s) do you use most frequently? (check all that apply)
 - Disclosure Authorization (DA)
 - Transcript Delivery System (TDS)
 - Electronic Account Resolution (EAR)
 - Taxpayer Identification Number (TIN) Matching
 - e-file* Application

- o If you had the option of having your copy of a taxpayer account notice delivered to your e-services secure mailbox **instead of** receiving paper notices, how likely would you be to choose this option?
 - Very likely
 - Somewhat likely
 - Not very likely
 - Not at all likely
 - Not authorized to receive copies of any taxpayer notices

- o What do you like most about e-services?

- o How can we improve e-services?

- No
 - o Why not?
 - Not familiar with e-services products
 - Do not need to use e-services
 - Too difficult to get started
 - Other _____

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