

W&I Market Segment Survey 2009

June 2, 2009, Online Version 1.1.0

n=3,105 Online (2,400 English, 400 Spanish LEP, oversample additional 305 local IRS office users)

CONSENT [DISPLAY]

The Internal Revenue Service (IRS) is trying to improve its services by asking customers about their experiences and opinions. This survey is voluntary. Your answers will help the IRS reduce the burden on the average taxpayer in preparing and filing their taxes. They will also help the IRS in finding ways to improve the level of service they provide to taxpayers.

The survey will take about 20 minutes to complete. This is an opinion survey about YOUR experiences in preparing and filing your taxes. It's okay if you used a tax professional to help prepare your returns. We need input from all kinds of people to get a true picture of what Americans think, not just what "experts" say.

This survey is being conducted for the IRS by an independent national research organization, Knowledge Networks. If you have any questions about this survey, please contact Knowledge Networks Panel Relations at (800) 782-6899.

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

Thank you in advance for your help!

Panel member variables included in data file. May not need to ask survey respondents following questions unless categories W&I categories differ.

- Gender
- Age
- Age - 7 categories
- Age - 4 categories
- Education (Highest Degree Received)
- Education (Categorical)
- Race / Ethnicity
- Household Head
- Household Size
- Ownership Status Of Living Quarters
- Household Income
- Marital Status
- Housing Type
- Presence Of Household Members - Children under 2
- Presence Of Household Members - Children 2-5
- Presence Of Household Members - Children 6-12
- Presence Of Household Members - Children 13-17
- Presence Of Household Members - Adults 18+
- Current Employment Status
- State
- Region 4 - Based On State Of Residence
- Region 9 - Based On State Of Residence
- MSA Status
- HHs with Internet Access

[PROGRAMMING: ENSURE CORRECT LANGUAGE OFFERED TO RESPONDENTS BASED ON PANEL DATA]

- English..... 1
- Spanish.....2

XIRS [SAMPLE VARIABLE]

- 1- GENERAL POPULATION SAMPLE: n=2,400**
- 2- LOCAL OFFICE AUGMENTATION SAMPLE: n=305 (to obtain at least 400 total)**
- 3- LIMITED ENGLISH PROFICIENT SPANISH SAMPLE: n=400**

[SC,IF XIRS = 3]

S1e. Would you say you can carry on a conversation in English, both understanding and speaking, very well, pretty well, just a little, or not at all?

- 1 Very well
- 2 Pretty Well
- 3 Just a little
- 4 Not at all

[SC,IF XIRS = 3]

S1f. Would you say you can read a newspaper or book in English-- very well, pretty well, just a little, or not at all?

- 1 Very well
- 2 Pretty Well
- 3 Just a little

4 Not at all

[PROGRAMMING: If S1e=3 or 4, or S1f=3 or 4 CONTINUE. OTHERWISE, TERMINATE]

[SC, PROMPT, TERMINATE IF SKIPPED]

S1a. Did you or your spouse file a FEDERAL INCOME TAX RETURN this year for income earned in 2008?

- Yes, I or my spouse filed federal tax return.....1
- No federal income tax return filed for 2008 taxes..2
- Not sure/Refused..... 3

[SC, IF S1A = 2, 3, PROMPT, TERMINATE IF SKIPPED]

S1c. Did you *not* file a federal income tax return this year for 2008 taxes because you....

- Got an extension.....1
- Were under the income limit for filing.....2
- Were a dependent of someone outside the household.....3
- Something else (SPECIFY).....4
- Not sure5
- Did file federal tax return.....6

[IF S1C IN 1-5, TERMINATE]

[SC, PROMPT, TERMINATE IF SKIPPED]

S2. Would you say that you are the adult in your household who is most familiar with the preparation and filing of your 2008 federal income tax return **[IF XIRS = 3 ‘and your preferred language is Spanish’]**?

- Yes, most familiar.....1
- Equally familiar.....2
- Not most/equally familiar.....3 **[TERMINATE]**

PROMPT, TERMINATE IF SKIPPED]

S3. Who prepared your taxes?

- 1 I (myself)
- 2 A friend or family member (relative)
- 3 The IRS
- 4 A volunteer (at a Volunteer Income Tax Assistance or Tax Counseling for the Elderly site where volunteers prepare your taxes)
- 5 An independent accountant/CPA
- 6 H&R Block
- 7 Jackson Hewitt
- 8 Other paid professional
- 9 **[IF XIRS = 3, SHOW ‘Notario’]**
- 10 Someone else
- 11 Don’t Know **[TERMINATE]**

[SC, PROMPT, TERMINATE IF SKIPPED]

S4. Which of the following is the filing status you used on your return?

- 1 Single
- 2 Married, filing jointly
- 3 Married, filing separately

- 4 Head of Household (single with dependent parent or child)
- 5 Qualifying widow(er) with dependent child
- 6 Don't Know **[TERMINATE]**

S6. Which of the following forms were used to file your 2008 tax return (tax return filed in 2009 for income earned in year 2008)?

- 1 Short form 1040EZ - did not itemize deductions **[skip to q1a]**
- 2 Short form 1040A - did not itemize deductions **[skip to q1a]**
- 3 Long form 1040 WITHOUT other forms or schedules - did not itemize deductions **[skip to q1a]**
- 4 Long form 1040 WITH other forms or schedules -did itemize deductions
- 5 Long form- don't remember if had other forms/schedules
- 6 Short form don't remember which one **[skip to q1a]**
- 7 Don't know - someone else prepared or filed it

[SC, GRID, IF S6 = 4 OR 5]

S6a. Which of the following form and schedules were filed with your 2008 return? Did you file a:

- A. Schedule A for itemized deductions including home mortgage deductions, charitable contributions, and other types of deductions
- B. Schedule B for interest and dividend income
- C. Schedule C for small business income
- D. Schedule D for capital gains or losses
- E. Schedule E for supplemental income, such as rental income, royalties, and trusts
- F. Schedule F for farm income
- G. Form 2106 employee business expenses

1—Yes 2—No 3—Don't Know

[SC, GRID, , DISPLAY SCHEDULES NOT ANSWERED YES IN S6A OR SHOW ALL FOR CODE 7 IN S6, PROMPT, TERMINATE IF SKIPPED]

S6b. Did you report any of the following types of income or losses on your 2008 federal tax return (for income earned in year 2008)?

- a. **[SHOW IF S6aC NE 1]** Small business I own (Schedule C)
- b. **[SHOW IF S6aE NE 1]** Rental property (Schedule E)
- c. **[SHOW IF S6aE NE 1]** Royalties (Schedule E)
- d. **[SHOW IF S6aE NE 1]** Estate or trust (Schedule E)
- e. **[SHOW IF S6aF NE 1]** A farm I own (Schedule F)
- f. Partnership or S Corporation **[IF YES, TERMINATE]**

1—Yes 2—No 3—Don't Know

I. AWARENESS AND IRS INTERACTIONS IN PAST 12 MONTHS

AWARENESS

[SC, GRID]

Q1a. The following questions are about your awareness of different ways to contact the IRS.

Regardless of language, are you *aware* that you can get information or help such as obtaining forms or tax law information from the IRS in the following ways . . .

1—Yes 2—No

- a Calling the IRS Toll-Free line?
- b Visiting the Local IRS Office (Taxpayer Assistance Center)?
- c Visiting the IRS web site?
- d Sending regular mail to the IRS?
- e E-mailing the IRS?
- f Dealing with Volunteers trained by the IRS that provide free tax preparation?

Q44. Are you aware that you can track the status of your refund on the IRS web site?

- 1 Yes
- 2 No

Q1a.1 Are you aware that you can obtain identity theft information on the IRS web site?

- 1 Yes
- 2 No

[IF XIRS = 3, SC, GRID]

Q1b. Are you *aware* that you can get information or help such as obtaining forms or tax law information from the IRS in the following ways in Spanish?

1—Yes 2—No

- a Calling the IRS Toll-Free line in Spanish?
- b Visiting the Local IRS Office (Taxpayer Assistance Center) and getting assistance in Spanish?
- c Visiting the Español section of the IRS web site?
- d Sending regular mail to the IRS in Spanish?
- e Volunteers trained by the IRS to provide free tax preparation in Spanish?

[IF XIRS = 3, and Q1b_c=Yes, SC]

You mentioned that you are aware of the Español section of the IRS web site.

Q5s1. Did you know there is a “Where’s My Refund” section in Spanish on the IRS web site?

- 1 Yes
- 2 No

[IF XIRS = 3, and Q1c=Yes, SC]

Q5s2. Are you aware that you can get basic tax information, tax forms, instructions, and publications in Spanish from the Español section of the IRS web site?

- 1 Yes
- 2 No

INTRO1 [IF A “YES” RESPONSE TO Q1A_A THRU Q1A_E OR YES TO Q1B_A THRU Q1B_D , DISPLAY]
The next questions are about *any* contact you may have had with the Internal Revenue Service (IRS) in the past 12 months, including actively using the IRS web site to obtain information. **[IF XIRS = 3: ‘Please include all contacts regardless of whether they were in Spanish or English’]**

[IF A “YES” RESPONSE TO Q1A_A THRU Q1A_E OR YES TO Q1B_A THRU Q1B_D , SC, GRID]

Q2. In the past 12 months, did you contact the IRS for any reason, using any of the following methods:

1—Yes 2—No

- 2a **[ASK IF Q1A_A=YES OR Q1B_A=YES]** Call the IRS Toll-Free line
- 2b **[ASK IF Q1A_B=YES OR Q1B_B=YES]** Visit the local IRS office
- 2c **[ASK IF Q1A_C=YES OR Q1B_C=YES]** Actively visit the IRS web site to obtain information. Please do not count casual browsing.
- 2d **[ASK IF Q1A_D=YES OR Q1B_D=YES]** Contact the IRS through regular mail
- 2e **[ASK IF Q1A_E=YES]** Email the IRS

LOCAL [DATA ONLY]

**IF Q2B = 1 THEN LOCAL = 1 – YES
ELSE LOCAL = 2 – NO**

[IF XIRS = 2 AND LOCAL = 2, TERMINATE]

CHANNEL EXPERIENCE

[IF Q2A = YES; MC/NUM, GRID, RANGE 01-99]

Q3a/3b. For which of the following reasons did you call the toll-free line in the past 12 months, and for each issue mentioned, how many times did you call Toll-Free for this issue?

. Issue	A.CHECKBOX	b. # Times
1. Getting a form or publication		_____
2. Getting tax return preparation assistance – includes getting information on which forms to file, record keeping, completing or filing income taxes, and how to get help with taxes		_____
3. Getting information about making payment		_____
4. Getting information or assistance about resolving a notice (A notice is a letter from the IRS regarding e.g. balance due/Levy/Lien.)		_____
5. Obtaining Prior Year Tax Return Information		_____
6. Getting Economic stimulus/tax rebate information		_____
7. Getting Refund Information besides economic stimulus rebate		_____
8. Obtaining Individual or Employer Tax ID		_____
9. Answering tax law questions, besides notice you received. Tax law examples include figuring out which deductions to take advantage of, figuring out how to file estate taxes, etc.		_____
10. Other, specify [If “Other” selected and nothing entered in blank, prompt once]		_____

Español Toll-Free Line

[IF XIRS = 3, SC]

Q3s1. When you called the IRS Toll-free line, did you use the Spanish language option, English language option, or both?

- 1 Spanish only
- 2 English only
- 3 Both

Q3c. Was there anything difficult about using the Toll-Free line?

- 1 Yes
- 2 No

[IF Q3C = 1, MC]

Q3d. What about using the Toll-Free line was difficult for you?

- 1 Getting correct answers to my question
- 2 Understanding the answer

- 3 Ease of getting through to Toll-Free line/Wait time
- 4 Time it took to get the information
- 5 Getting a Live Person on the Phone
- 6 Getting Someone Who Speaks Spanish
- 7 Navigating the Automated System
- 8 Something Else (Please Specify) _____

[IF Q2A = YES , SC]

Q3e. Did you hang up before getting through or before receiving the information you needed?

- 1 Yes
- 2 No

[IF Q3E = 1, MC]

Q3g. What were your reasons for hanging up?

- 1 Kept getting a busy signal
- 2 Placed on hold too long
- 3 Kept getting transferred
- 4 Couldn't understand the menu system
- 5 Too many choices to listen to on the menu system
- 6 Other

[IF Q2A = YES , SC]

Q3h. Were you transferred more than once when you called?

- 1 Yes
- 2 No

[IF Q3h=YES, SC]

Q3h1. What's the main reason that you were transferred? (Select one)

- 1 I got a different issue that needs to be answered by someone else
- 2 I was transferred to a more knowledgeable representative
- 3 I was transferred to someone who has authority to resolve my issue

[IF Q2A = YES , SC]

Q3i. Did you get unclear information (information that was not easy to understand)?

- 1 Yes
- 2 No

TIME1 [DATA ONLY, ROTATE]

1. 5 minutes
2. 10 minutes
3. 15 minutes

[IF Q2A = YES , SC]

Q3k. If you knew you had to wait **[INSERT TIME1]** to receive service from a representative on the Toll-Free line, how likely would you be to continue to hold?

- 1 Not at all likely
- 2 Not very likely
- 3 Somewhat likely
- 4 Very likely

[IF Q2A = YES , SC]

Q3l. Think about all aspects of using the IRS Toll-Free line. Please rate your satisfaction with using the Toll-Free line.

- 1 Very dissatisfied
- 2 Dissatisfied
- 3 Neither satisfied nor dissatisfied (neutral)
- 4 Satisfied
- 5 Very satisfied

Local IRS Office [PROGRAMMING: IF Q2b=YES, continue with this section]

**[IF LOCAL = 2, GO TO Q5A
ELSE CONTINUE WITH Q4A]**

[MC/NUM, GRID, RANGE 01-99]

Q4a/4b. For which of the following reasons did you visit a local IRS office, or Taxpayer Assistance Center, in the past 12 months, for each issue mentioned, how many times did you use a local IRS office for this issue?

a. Issue	b. # Times
1. Getting a form or publication	_____
2. Getting tax return preparation assistance – includes getting information on which forms to file, record keeping, completing or filing income taxes, and how to get help with taxes	_____
3. Getting information about making payment	_____
4. Getting information or assistance about resolving a notice (A notice is a letter from the IRS regarding e.g. balance due/Levy/Lien.)	_____
5. Obtaining Prior Year Tax Return Information	_____
6. Getting Economic stimulus/tax rebate information	_____
7. Getting Refund Information besides economic	_____

stimulus rebate	_____
8. Obtaining Individual or Employer Tax ID	_____
9. Answering tax law questions, besides notice you received. Tax law examples include figuring out which deductions to take advantage of, figuring out how to file estate taxes, etc.	_____
10. Other, specify [If “Other” selected and nothing entered in blank, prompt once]	_____

[IF XIRS = 3, SC]

Q4s1 Did you need assistance in Spanish when you visited a local IRS office?

- 1 Yes
- 2 No

[IF Q4S1 = 1, SC]

Q4s2 Did you receive assistance in Spanish?

- 1 Yes
- 2 No

[IF Q4S2 = 1, SC]

Q4s3 Did you receive assistance from a bilingual assistor, or did you use the over the phone interpreter service?

- 1 Bilingual assistor
- 2 Over the Phone interpreter

[IF Q4S3 = 1, SC]

Q4s4 Please rate your satisfaction with using the bilingual assistor?

- 1 Very dissatisfied
- 2 Dissatisfied
- 3 Neither satisfied nor dissatisfied (neutral)
- 4 Satisfied
- 5 Very satisfied

[IF Q4S3 = 2, SC]

Q4s5 Please rate your satisfaction with using the over-the-phone interpreter?

- 1 Very dissatisfied
- 2 Dissatisfied
- 3 Neither satisfied nor dissatisfied (neutral)
- 4 Satisfied
- 5 Very satisfied

TIME2 [DATA ONLY, ROTATE]

1. 10 minutes

2. 30 minutes
3. 60 minutes

[SC]

Q4c. If you knew you had to wait **[INSERT TIME2]** minutes to receive service from a representative at the local IRS office, how likely would you be to continue waiting?

- 1 Not at all likely
- 2 Not very likely
- 3 Somewhat likely
- 4 Very likely

[SC]

4d. Think about all aspects of using an IRS office. Please rate your satisfaction with using the IRS office (Taxpayer Assistance Center).

- 1 Very dissatisfied
- 2 Dissatisfied
- 3 Neither satisfied nor dissatisfied (neutral)
- 4 Satisfied
- 5 Very satisfied

IRS web site [PROGRAMMING: If Q2c=YES, continue with this section]

**[IF Q2C NE 1, GO TO Q6A
ELSE CONTINUE WITH Q5A]**

[MC/NUM, GRID, RANGE 01-99]

5a/5b. For which of the following reasons did you actively use the IRS web site **in the past 12 months**? Please do not count casual browsing, and for each issue mentioned, how many times did you use the IRS web site for this issue?

a. Issue	b. # Times
1. Getting a form or publication	_____
2. Getting tax return preparation assistance – includes getting information on which forms to file, record keeping, completing or filing income taxes, and how to get help with taxes	_____
3. Getting information about making payment	_____
4. Getting information or assistance about resolving a notice (A notice is a letter from the IRS regarding e.g. balance due/Levy/Lien.)	_____
5. Obtaining Prior Year Tax Return Information	_____
6. Getting Economic stimulus/tax rebate information	_____
7. Getting Refund Information besides economic stimulus rebate	_____
8. Obtaining Individual or Employer Tax ID	_____
9. Answering tax law questions, besides notice you received. Tax law examples include figuring out which deductions to take advantage of, figuring out how to file estate taxes, etc.	_____
10. Other, specify [If “Other” selected and nothing entered in blank, prompt once]	_____

Q5c.1 Did you visit the IRS web site for information about identity theft?

(If yes) Were you able to obtain information about identity theft on IRS web site?

- 1 Yes
- 2 No

Q5c.2 What specific information did you obtain from the IRS web site? (select all that apply)

- 1 What to do if you are a victim of Identity Theft
- 2 What to do if you believe your tax records have been impacted due to Identity Theft
- 3 How to report a suspected fraudulent IRS web site
- 4 What are the identified fraudulent IRS web sites
- 5 How the IRS protects your personal information
- 6 What to do if you believe the IRS has compromised your personal information
- 7 Other

If q5c.1=NO,

Q5c.3 Please specify what information regarding Identity Theft you were not able to obtain from IRS web site?

Open end _____

If q5c.1=YES

How satisfied were you with the information you received regarding Identity Theft?

- 1 Very dissatisfied
- 2 Dissatisfied
- 3 Neither satisfied nor dissatisfied (neutral)
- 4 Satisfied
- 5 Very satisfied

[IF XIRS = 3, SC]

Q5s3. When you used the IRS web site to get information, did you use the Español section of the IRS web site, the IRS web site in English, or both?

- 1 Spanish only
- 2 English only
- 3 Both Spanish and English

[IF XIR=3 AND Q5S3 = 3, SC]

Q5s6. **Which** language section of the IRS web site did you use more?

1. Español
2. English
3. About the same

[IF Q5a_7 = 1 AND XIR=3, SC]

Q5s5. How satisfied were you with the information received on the “Where’s My Refund ” Español section of the IRS Web site ?

- 1 Very dissatisfied
- 2 Dissatisfied
- 3 Neither satisfied nor dissatisfied (neutral)
- 4 Satisfied
- 5 Very satisfied

[IF Q5S3 = 2 AND XIR=3, MC]

Q5s7 What were the reasons you have not used the Español section of the IRS web site?

- 1 I’m not aware of the IRS Spanish web site
- 2 I’m not aware that tax info is available in Spanish
- 3 I prefer to get Spanish information from the English IRS web site
- 4 Other (specify) _____

Q5c. Was there anything difficult about using the IRS web site ?

- 1 Yes

2 No

[IF Q5C = 1, MC]

Q5d. What about using the IRS web site was difficult for you?

- 1 Language problems using/understanding info
- 2 Finding the information I needed
- 3 Using the Search Engine (not language related)
- 4 Understanding the information (not language related)
- 5 Time I spent
- 6 Too Many Pop-ups/Leading me to Other Sites
- 7 Difficulty Downloading
- 8 Difficulty Printing Out Forms
- 9 Something else (Please Specify)

[SC]

Q5e. Were you able to obtain the information you were seeking **[IF XIRS = 3: 'in Spanish']**?

- 1 Yes
- 2 No

[SC]

Q5f. Did you get unclear information?

- 1 Yes
- 2 No

[SC]

Q5h. Think about all aspects of using the IRS web site, please rate your satisfaction with using the IRS web site.

- 1 Very dissatisfied
- 2 Dissatisfied
- 3 Neither satisfied nor dissatisfied (neutral)
- 4 Satisfied
- 5 Very satisfied

Regular Mail [PROGRAMMING: If Q2d=YES, continue with this section]

**[IF Q2D NE 1, GO TO Q7A
ELSE CONTINUE WITH Q6A]**

[MC/NUM, GRID, RANGE 01-99]

Q6a/6b. For which of the following reasons did you use regular mail to contact the IRS in the past 12 months, and for each issue mentioned, how many times did you use regular mail for this issue?

a. Issue	b. # Times
1. Getting a form or publication	_____
2. Getting tax return preparation assistance – includes getting information on which forms to file, record keeping, completing or filing income taxes, and how to get help with taxes	_____
3. Getting information about making payment	_____
4. Getting information or assistance about resolving a notice (A notice is a letter from the IRS regarding e.g. balance due/Levy/Lien.)	_____
5. Obtaining Prior Year Tax Return Information	_____
6. Getting Economic stimulus/tax rebate information	_____
7. Getting Refund Information besides economic stimulus rebate	_____
8. Obtaining Individual or Employer Tax ID	_____
9. Answering tax law questions, besides notice you received. Tax law examples include figuring out which deductions to take advantage of, figuring out how to file estate taxes, etc.	_____
10. Other, specify [If “Other” selected and nothing entered in blank, prompt once]	_____

[SC]

Q6c. Was there anything difficult about contacting the IRS by regular mail?

- 1 Yes
- 2 No

[IF Q6C = 1, MC]

Q6d. What about contacting the IRS by regular mail was difficult for you?

- 1 Writing a letter
- 2 Time it took to receive a reply from the IRS
- 3 Getting correct answers to my question

- 4 Understanding the answer
- 5 Something Else (Please Specify) _____

[SC]

Q6e. Think about all aspects of contacting the IRS by regular mail. Please rate your satisfaction with contacting the IRS by regular mail.

- 1 Very dissatisfied
- 2 Dissatisfied
- 3 Neither satisfied nor dissatisfied (neutral)
- 4 Satisfied
- 5 Very satisfied

Email [PROGRAMMING: IF Q2e=YES, continue with this section]

**[IF Q2E NE 1, GO TO Q8
ELSE CONTINUE WITH Q7A]**

[MC/NUM, GRID, RANGE 01-99]

Q7a/7b. For which of the following reasons did you send email to the IRS in the past 12 months, and for each issue mentioned, how many times did you use email for this issue?

a. Issue	b. # Times
1. Getting a form or publication	_____
2. Getting tax return preparation assistance – includes getting information on which forms to file, record keeping, completing or filing income taxes, and how to get help with taxes	_____
3. Getting information about making payment	_____
4. Getting information or assistance about resolving a notice (A notice is a letter from the IRS regarding e.g. balance due/Levy/Lien.)	_____
5. Obtaining Prior Year Tax Return Information	_____
6. Getting Economic stimulus/tax rebate information	_____
7. Getting Refund Information besides economic stimulus rebate	_____
8. Obtaining Individual or Employer Tax ID	_____
9. Answering tax law questions, besides notice you received. Tax law examples include figuring out which deductions to take advantage of, figuring out how to file estate taxes, etc.	_____
10. Other, specify [If “Other” selected and nothing entered in blank, prompt once]	_____

[SC]

Q7e. Think about all aspects of contacting the IRS by email. Please rate your satisfaction with contacting the IRS by email.

- 1 Very dissatisfied
- 2 Dissatisfied
- 3 Neither satisfied nor dissatisfied (neutral)
- 4 Satisfied
- 5 Very satisfied

[SC, IF YES TO 2A, B, C, D, OR E]

Q8. Did you contact the IRS for any other reasons you have not mentioned?

- YES 1- 5% said yes
NO 2

[TXT, IF Q8 = 1]

Q8A What other reasons? _____ VARIOUS _____

VITA [PROGRAMMING: ASK Q10a IF Q1a_f=Yes OR Q1b_e=Yes, ELSE SKIP TO Q11]

**[IF Q1A_F=YES OR Q1B_E=YES CONTINUE WITH Q10A
ELSE SKIP TO Q11]**

[SC]

Q10a. Did you get free tax preparation help for your 2008 taxes from volunteers trained by the IRS?

- 1 Yes
- 2 No [SKIP TO Q11]

[IF XIRS = 3, SC]

Q10s1. The IRS offers Volunteer Income Tax Assistance services in Spanish. Did you need assistance in Spanish?

- 1 Yes
- 2 No

[IF Q10S1 = 1, SC]

Q10s2 Did you receive assistance in Spanish?

- 1 Yes
- 2 No

[IF Q10A = 1, SC]

Q10b. Was there anything difficult about using the free tax preparation services provided by volunteers trained by the IRS?

- 1 Yes [PROGRAMMING: Continue]

2 No **[PROGRAMMING: Skip to Q10d]**

[IF Q10A = 1, SC]

Q10d. Think about all aspects of getting free tax preparation help from volunteers while preparing your 2008 taxes, please rate your satisfaction with getting free tax preparation services from volunteers.

- 1 Very dissatisfied
- 2 Dissatisfied
- 3 Neither satisfied nor dissatisfied (neutral)
- 4 Satisfied
- 5 Very satisfied

[IF XIRS = 3, TXT]—

Q11. What additional tax information, if any, would you like made available in Spanish?

Open end _____

Cross-Channel Interactions (ALL RESPONDENTS)

Q12. If you were to go to a local IRS office, how likely would you be to consider using a computer or phone line at a local IRS office, instead of talking to a representative in-person? A representative would still be available if you had questions. Would you be . . .

- 1 Very unlikely
- 2 Somewhat unlikely
- 3 Somewhat likely
- 4 Very likely

[MC, IF Q2C = NO AND (Q2B = YES OR Q2A = YES)]

Q13. What are the main reasons you visited a local office or used the toll-free line instead of visiting the IRS web site to get information from the IRS?

- 1 I don't have Internet access
- 2 I am used to going to local IRS offices
- 3 I am used to calling the Toll-Free line
- 4 I don't believe I can get my questions answered by using the IRS web site
- 3 I did try to use the IRS web site
- 4 I wasn't aware of the IRS web site
- 5 The letter I received from the IRS said to call a telephone number
- 6 The letter I received from the IRS said to go to a local office
- 7 Something else (specify)

[MC]

Q14. Which tax-related activities would you perform in the future using the IRS web site (www.irs.gov)?

- 1 Get an IRS form or publication
- 2 Get help preparing a federal tax return or form (tax return prep assistance)
- 3 File a federal tax return or form

- 4 Find an answer to a tax law question
- 5 Find out where to send payments (payment information)
- 6 Set up a payment plan (payment information)
- 7 Make a payment
- 8 Get information on or respond to a letter or notice received from the IRS
- 9 Obtain prior year's tax return information
- 10 Get information about a refund
- 11 Obtain individual tax ID number or employer ID number
- 12 Something else (specify)_____
- 13 None – I would not complete any of these activities using the IRS web site

[SC, IF Q14 NE 13]

Q15. If you were able to review your federal tax return information online through a secure link on the IRS web site, how likely would you be to use this service? Would you be . . .

- 1 Very unlikely
- 2 Somewhat unlikely
- 3 Somewhat likely
- 4 Very likely

Q5g (Ask all) What would motivate you to use the IRS web site?

- 1 If the information was easier to locate by navigating through the web site
- 2 If the information answered my questions
- 3 If the search engine in the IRS web site was easier to use
- 4 If I have internet access
- 5 Other (specify)_____

Are you aware that the IRS does not initiate taxpayer communication or request detailed personal information through e-mail?

- 1 Yes
- 2 No

Do you know what to do if the IRS contacts you because of a tax issues that you believe may have been created as a result of identity theft?

- 1 Yes
- 2 No

If yes, please specify what you can do.

Would you know what to do if received an e-mail claiming to be from the IRS or directing you to an IRS site and requesting personal information?

- 1 Yes
- 2 No

If yes, please specify what you would do.

SECTION II. FIRST CONTACT RESOLUTION

[PROGRAMMING: SKIP TO SECTION III IF Q2a thru Q2e is not yes]

[IF ALL Q2A THROUGH Q2E NE YES SKIP TO Q23. ELSE CONTINUE WITH Q16]

[SC]

Q16 You mentioned that you have contacted the IRS in the past 12 months. Contacting the IRS includes calling the IRS toll-free line, visiting a local IRS office, actively visiting the IRS web site (not casual browsing), contacting the IRS through regular mail, or emailing the IRS.

What was the most recent reason that you contacted the IRS in the past 12 months?

A form or publication

Tax return preparation assistance

Payment information

A balance due

Levy/Lien

Information or assistance about a notice, other than balance due or levy/lien (A notice is a letter from the IRS)

Tax law question(s), besides notice

A prior year's tax return information

Information about the Economic Stimulus /tax rebate

Refund information (non-Economic Stimulus related)

Individual or Employer Tax ID

Information on eligibility or filing for Earned Income Tax Credit (EITC)

Other, specify _____

[IF NO RESPONSE SELECTED IN Q16, SKIP TO Q23]

KN: Can you use a different color for the issue selected in Q16 for Q17 thru Q22

[SC]

Q17. Did you contact the IRS more than once in the past 12 months to get help with your most recent issue - -

[INSERT RESPONSE FROM Q16]?

Yes

No

[IF Q17 IS SKIPPED, SKIP TO Q23]

[SC]

Q18. Thinking back to the **[IF Q17 = 1 INSERT: 'very first']** time you contacted the IRS in the past 12 months for **[INSERT RESPONSE FROM Q16]** what method did you use for contact?

IRS web site

Toll-Free (telephone)

IRS office (TAC, walk-in center)

Mail

E-mail

[IF Q18 IS SKIPPED, SKIP TO Q23]

[MC, IF Q17 = 1] programmer; only show option not selected in Q18

Q19. Besides **[INSERT RESPONSE FROM Q18]**, what other methods did you use to contact the IRS in the past 12 months to get help with your most recent issue - - **[INSERT RESPONSE FROM Q16]**

- IRS web site
- Toll-Free (Telephone)
- IRS office (TAC, walk-in center)
- Mail
- E-mail
- None **[SC]**

[SC]

Q20a. When you contacted the IRS **[IF Q17 = 1 INSERT: 'the very first time']** using **[INSERT RESPONSE FROM Q18]** for **[INSERT RESPONSE FROM Q16]** did you expect to resolve this issue with just one contact to the IRS?

- 1 Yes
- 2 No

[SC]

Q20b. During your **[IF Q17 = 1 INSERT: 'first']** time using **[INSERT RESPONSE FROM Q18]**, did you get what you needed in order to resolve this issue?

- Yes **[GOTO Q23]**
- No

[MC, IF Q20B = 2]

Q21. What could the IRS have done differently in order to help you resolve your most recent issue **[INSERT RESPONSE FROM Q16]** during your first contact using **[INSERT RESPONSE FROM Q18]**?

The IRS:

- 1 Should have given me the right answer the first time
- 2 Needs to make information easier to understand
- 3 **[IF Q18 NE 1 OR 4]** Representatives should be trained to be better listeners
- 4 **[IF Q18 NE 1 OR 4]** Representatives should have repeated back what I told them so I'd know they had it right
- 5 **[IF Q18 NE 1]** Representatives should have more authority
- 6 **[IF Q18 NE 1]** Should have provided me with more timely information
- 7 **[Q18 =1]** Should have had the information that I needed online so I could use the IRS web site to resolve the issue
- 8 Should have done something else (specify) _____.
- 9 Nothing **[SC]**

[MC, IF Q20B = 2]

Q22. What could you have done differently in order to help resolve **[INSERT RESPONSE FROM Q16]** during your first contact with the IRS?

- 1 Could have gathered all the information I needed before contacting IRS
- 2 Could have kept better records or documentation
- 3 Could have read the letter or notice more carefully before contacting IRS
- 4 Could have contacted IRS sooner after receiving the letter or notice
- 5 Could have used a different method to contact the IRS - the contact method I used did *not* have information about my issue available
- 6 Other (specify) _____.
- 7 Nothing **[SC]**

III. PREPARING AND COMPLETING YOUR RETURN AND FILING

[MC]

Q23. The next questions are about completing and filing your 2008 taxes.

Where did you get general tax information, including information about changes in tax laws for your 2008 federal tax return?

- 1 IRS direct mailings
- 2 IRS web site in English
- 3 IRS web site in Spanish
- 4 IRS telephone contact
- 5 IRS in-person
- 6 IRS sponsored tax class or seminar
- 7 IRS (unspecified)
- 8 Accountant/tax preparer (H&R Block, Jackson Hewitt)
- 9 Employer/Union/Trade Organization
- 10 Family/Friend
- 11 Library
- 12 [IF XIRS = 3] Notario**
- 13 Non-IRS Books and Publications
- 14 Non-IRS web site
- 15 Post Office
- 16 Social/Community Organization (Church/religious group, theaters, community centers/outreach groups, schools)
- 17 Tax preparation software (TurboTax, TaxAct, etc)
- 18 Other [specify]

[MC]

Q24. Where did you get forms and publications for your 2008 federal tax return?

- 1 IRS direct mailings
- 2 IRS web site in English
- 3 IRS web site in Spanish
- 4 IRS telephone contact
- 5 IRS in-person
- 6 IRS sponsored tax class or seminar
- 7 IRS (unspecified)
- 8 Accountant/tax preparer (H&R Block, Jackson Hewitt)
- 9 Employer/Union/Trade Organization
- 10 Family/Friend
- 11 Library
- 12 Notario [PROGRAMMING: Spanish-only]**
- 13 Non-IRS Books and Publications
- 14 Non-IRS web site
- 15 Post Office
- 16 Social/Community Organization (Church/religious group, theaters, community centers/outreach groups, schools)
- 17 Tax preparation software (TurboTax, TaxAct, etc)
- 18 Other [specify]

[PROGRAMMING: IF accountant or notario in both Q23 and Q24, skip Q25]

[PROGRAMMING: IF (Q23=8 OR 12) AND (Q24=8 OR 12), SKIP TO CONDITIONAL BEFORE Q26]

[IF (Q23NE 8 OR 12) AND (Q24 NE 8 OR 12), SC]

Q25. Considering all sources you used, please rate your satisfaction with the ease of getting general tax information, including forms or publications.

- 1 Very dissatisfied
- 2 Dissatisfied
- 3 Neither satisfied nor dissatisfied (neutral)
- 4 Satisfied
- 5 Very satisfied

[IF S3 = 1 OR 2, SC]

Q26. How did **[IF S3 = 1 INSERT 'you'/ IF S3 = 2, INSERT 'your friend or relative']** prepare your 2008 federal taxes? By this, we mean filling out the forms and not necessarily the actual filing task. Did **[IF S3 = 1 INSERT 'you'/ IF S3 = 2, INSERT 'your friend or relative']** prepare them?

- 1 By hand, using IRS tax forms
- 2 On the computer, using a purchased computer program (such as TurboTax)
- 3 On the computer, using Free File on the IRS web site
- 4 On the computer, using Spanish Free File on the IRS web site
- 5 Both by hand and on the computer using a purchased computer program
- 6 Both by hand and on the computer using Free File on the IRS web site
- 7 Both by hand and on the computer using Spanish Free File on the IRS web site
- 8 Other, specify

[IF S3 = 1, SC]

Q27. Did you have your 2007 federal tax return available to you when you prepared your 2008 return?

- 1 Yes
- 2 No
- 3 First time filer/Not applicable

[SC]

Q28. Did you apply for the Earned Income Tax Credit, EITC, when you filed your 2008 federal tax return this year?

- 1 Yes
- 2 No

[SC]

Q29. During the past year the IRS' Earned Income Tax Credit (EITC) advertising campaign was, "I Take Credit". Have you seen or heard this advertisement?

- 1 Yes
- 2 No

Q33. Are you aware that you can file your federal tax return electronically?

- 1 Yes
- 2 No

Q35. Are you aware that “Free-File” option is available on www.irs.gov, where some taxpayers can file their federal return electronically at no cost if they meet certain income requirements?

- 1 Yes
- 2 No

[SC, IF XIRS = 3 and Q35=yes]

Q35s1. Are you aware that this Free-File option is also available in Spanish from the Espanol section of irs.gov?

- 1 Yes
- 2 No

[SC]

Q30a. How was your federal tax return filed this year? Did you:?

- 1 File by regular mail
- 2 File electronically (e-file)
- 3 Deliver in person
- 4 Not sure, filed by someone else

[SC, IF Q30A = 2]

Q30a1 How did you electronically file your federal tax return this year?

- 1 By computer using a “Free-File” option through www.irs.gov in English with no cost
- 2 By computer using tax preparation software like TurboTax or TaxAct
- 3 (IF XIRS=3) By computer using a “Free-file” option through the Espanol section of the IRS.gov with no cost
- 4 Not sure how\filed by my tax preparer

[SC, IF Q30A = 1,2, 3]

Q31a. Did you **INSERT RESPONSE FROM Q30A** in the previous year?

- 1 Yes
- 2 No

[SC, IF Q31A = 2]

Q31b. What is the main reason you changed the way you filed your tax return this year?

- 1 New computer access/computer programs
- 2 IRS Free-file options
- 3 Advertising
- 4 Tax preparer influenced change
- 5 Word of mouth

- 6 Quicker/Faster Refund
- 7 Easier/More Convenient
- 8 Owed Money
- 9 Change in Filing Status
- 10 Wanted to Try Different Method
- 11 Security Issues
- 12 Cost
- 13 First Time Filer/Haven't Filed for Previous Years
- 14 Filed for an Extension/Meeting Deadline
- 15 Other (specify)

[SC, IF Q33 = 1 AND Q30A = 1 OR 3]

34 What is the primary reason that your return was not filed electronically?

- 1 Like paper filing
- 2 Cost
- 3 Don't trust e-filing
- 4 [IF S3 NE 1] The option was not offered to me
- 5 [IF S3 = 1] No access to Internet/computer
- 6 Did not know about it/Never thought about it
- 7 Too hard/complex
- 8 Don't trust security with sending my personal information online
- 9 Owed money to the IRS
- 10 No need/Prefer not to
- 11 Other (specify)_____

[SC, Q35 = 1 OR 35S1=1 OR Q30A1=1 OR 3]

Q36 How did you first learn about Free-File?

- 1 Billboard
- 2 Cinema, movie theater
- 3 Friend, family, colleague
- 4 IRS web site
- 5 Non-IRS web site
- 6 Magazine
- 7 Newspaper
- 8 Other IRS materials - Poster, brochure, flyer
- 9 Public transportation (bus, train, etc.)
- 10 Radio
- 11 Television
- 12 IRS Federal Income Tax Return package
- 13 Don't remember
- 14 Other

[MC if ((Q35=YES OR Q35S1=YES (AWARE OF FREE FILE)) AND ((Q30A=1 OR 3) OR (Q30a1=2))]

Q37:

What were the reasons that you did *not* use Free-file **for your 2008 tax return?**

- 1 Income not qualified
- 2 Wasn't aware of or don't understand what Free File is

- 3 Instructions too confusing on IRS web site
- 4 Difficult to use once I am on 3rd party web site
- 3 Don't have confidence in Free File/trust in Free-File
- 4 Don't trust security with sending my personal information online
- 5 Refund anticipation loan provides faster refund
- 6 Option Wasn't Offered/Chosen by Someone Else
- 7 Not Interested/Prefer other method
- 8 Complicated Taxes
- 9 Other (specify)_____

[SC, GRID]

Q38. Here are some questions about preparing and filing your return. How satisfied were you with:?

- 1 Very dissatisfied
- 2 Dissatisfied
- 3 Neither satisfied nor dissatisfied (neutral)
- 4 Satisfied
- 5 Very satisfied

[IF S3 NE 1 SHOW]

- A. The tax advice provided by the person who prepared your taxes
- B. The accuracy of the person who prepared your taxes
- C. The knowledge of the person who prepared your taxes
- D. The time it took that person to prepare your taxes after you provided all the necessary information

[IF S3 = 1 SHOW]

- E. The time you spent completing your federal tax return
- F. The ease of understanding what materials and documents to include with your federal tax return
- G. The ease of understanding where to send your return
- H. **[IF Q30A1=2]** The amount of money you spent to file your federal tax return electronically
- I. **[IF Q30A1=1 OR 35s2=1]** Ease of using Free-File through the IRS web site

[S3 NE 1, SC]

Q39a1 Taking all factors into account, please rate your overall satisfaction with the person who completed your return.

- 1 Very dissatisfied
- 2 Dissatisfied
- 3 Neither satisfied nor dissatisfied (neutral)
- 4 Satisfied
- 5 Very satisfied

[S3 NE 1, SC]

Q39a2. Taking all factors into account, please rate your overall satisfaction with the filing process (the actual filing task) of your federal return.

- 1 Very dissatisfied
- 2 Dissatisfied
- 3 Neither satisfied nor dissatisfied (neutral)
- 4 Satisfied
- 5 Very satisfied

[S3 = 1, SC]

Q39b. Taking all factors into account, please rate your satisfaction with preparing and filing your federal return.

- 1 Very dissatisfied
- 2 Dissatisfied
- 3 Neither satisfied nor dissatisfied (neutral)
- 4 Satisfied
- 5 Very satisfied

[S3 = 1, TXT]

Q40. Please tell us what you believe the IRS could do to improve the process of completing and filing your return.

IV. GETTING YOUR REFUND FROM THE IRS

[PROGRAMMING: IF Q3a=7 or Q4a=7 or Q5a=7 or Q6a=7 or Q7a=7 (Refund Information), ASK Q42b]

[IF Q3A NE 7 AND Q4A NE 7 AND Q5A NE 7 AND Q6A NE 7 AND Q7A NE 7, SC]

Q42a Did you contact the IRS about a refund from ANY tax year?

Yes **[GO TO Q42C]**

No **[GO TO Q43]**

[IF Q3A=7 OR Q4A=7 OR Q5A=7 OR Q6A=7 OR Q7A=7; SC]

42b You said earlier that you contacted the IRS about a refund by

[IF Q3A = 7 INSERT ‘calling the toll-free line’,

[IF Q4A = 7 INSERT ‘visiting a local IRS office’,

[IF Q5A = 7 INSERT ‘going to the IRS web site’,

[IF Q6A = 7 INSERT ‘using regular mail to contact the IRS’,

[IF Q7A = 7 INSERT ‘sending email to the IRS’]

Did you also contact the IRS about a refund from any tax year in the last 12 months through

[IF Q3A NE 7 INSERT ‘calling the toll-free line’,

[IF Q4A NE 7 INSERT ‘visiting a local IRS office’,

[IF Q5A NE 7 INSERT ‘going to the IRS web site’,

[IF Q6A NE 7 INSERT ‘using regular mail to contact the IRS’,

[IF Q7A NE 7 INSERT ‘sending email to the IRS’]

Yes **ASK Q42c**

No **SKIP TO Q43**

[IF Q42B = 1, MC/NUM GRID, RANGE 0-99]

Q42c How did you contact the IRS about the refund and how many times did you contact the IRS about a refund in the past 12 months for each method?

Method	CHECKBOX	Number of Times in Past 12 Months
1. [IF Q3A = 7 DO NOT DISPLAY OPTION] Call the IRS Toll-free number		_____
2. [IF Q4A = 7 DO NOT DISPLAY OPTION] Visit the local IRS office		_____
3. [IF Q5A = 7 DO NOT DISPLAY OPTION] Visit the IRS web site		_____
4. [IF Q6A = 7 DO NOT DISPLAY OPTION] Send regular mail to the IRS		_____
5. [IF Q7A = 7 DO NOT DISPLAY OPTION] Send email to the IRS		_____

[SC]

Q43. Following are some questions about getting your refund from the IRS for your 2008 federal tax return.

Did you owe money to the IRS or did you expect a refund from the IRS for your 2008 federal income taxes?

- 1 Owed money
- 2 Expected refund
- 3 Neither

[SC, IF Q43 = 2 and S3=5,6,7,8,9]

Q45a.] Did you receive a tax refund anticipation loan this year? A tax refund anticipation loan is an immediate loan, sometimes referred to as a “rapid refund”, which is typically facilitated by a tax preparer against an anticipated tax refund.

- 1 Yes
- 2 No

[IF Q45A = 1, SC]

Q45b. Would you still have taken that loan if you could have expected to receive your refund from the IRS in about three days?

- 1 Yes
- 2 No

[SC, IF Q43 = 2]

Q46 Have you received your refund for your 2008 tax return yet? If you were expecting a refund, but it was withheld for any reason, please answer “No”.

- 1 Yes
- 2 No
- 3 Applied to prior year balance/estimated tax

[IF 46 = 1, 2, SC]

Q48. **[IF Q46 = 2, SHOW** How did you request to receive your refund?
[IF Q46 = 1, SHOW How did you receive your refund?

- 1 Direct deposit
- 2 Paper check
- 3 Refund anticipation loan

[SC/GRID, IF Q43 = 2]

Q50. [Please rate your satisfaction with the following aspects of getting your refund from the IRS. How satisfied were you with:

- 1 Very dissatisfied
 - 2 Dissatisfied
 - 3 Neither satisfied nor dissatisfied (neutral)
 - 4 Satisfied
 - 5 Very satisfied
- Not applicable
- a **[IF Q46 = 1]** The time it took to receive your refund from the IRS
 - b **[IF Q46 = 1]** The accuracy of your refund
 - c **[IF Q46 = 1]** The IRS’s explanation of any adjustments to your refund
 - d The ease of making contact with the IRS about your refund
 - e Getting a clear answer to your questions when contacting the IRS about your refund

[SC, IF Q43 = 2]

Q51. Taking all factors into account, please rate your satisfaction with getting your refund from the IRS for the 2008 tax season?

- 1 Very dissatisfied
- 2 Dissatisfied
- 3 Neither satisfied nor dissatisfied (neutral)
- 4 Satisfied
- 5 Very satisfied

[IF IF Q4A = 4 OR Q56A = 2, SC]

Q56d. Were you able to resolve the issue in your notice(s) when you visited the local IRS office (Taxpayer Assistance Center)?

- 1 Yes
- 2 No

[IF Q6A = 4 OR IF Q56A = 4, SC]

Q56e. Were you able to resolve the issue in your notice(s) when you used mail correspondence?

- 1 Yes
- 2 No

[SC]

Q57. What was your most recent notice about?

- 1 Error on return: Under-reported income
- 2 Error on return: Inadequate withholdings
- 3 Failure to file a return
- 4 Failure to make payment
- 5 Failure to sign
- 6 Overpayment
- 7 Mistake/Error on Return
- 8 Refund Issue
- 9 Balance Owed Issue
- 10 Resubmitting/Missing forms
- 11 Penalty for late filing (from SESE Customer Base survey)
- 12 Other (specify)_____

[SC]

Q58a. Was the *most recent* notice...?

- 1 Resolved in your favor
- 2 Resolved, but not in your favor
- 3 Not resolved
- 4 Resolved, but unsure in whose favor

[SC, IF Q58A = 1, 2, 4]

Q58b Did you agree with the resolution of the most recent notice?

- 1 Yes
- 2 No

[NUM, IF Q58A = 1, 2, 4, RANGE 00-95, RECODE OPTIONS 96, 97 INTO NUMERIC VALUES OF 96, 97 IF CHOSEN]

Q58c. Approximately, how many months after you received the most recent notice were you informed that the issue was resolved (**Please enter actual number of months**)

- _____ months
- 96 96 or more
- 97 Never informed

[NUM, IF Q58A = 1, 2, 4, RANGE 00-96, RECODE OPTION 97 INTO NUMERIC VALUES OF 97 IF CHOSEN]]

Q59. Approximately, how many hours did you spend trying to resolve the issue in your most recent notice?

_____ hours

97 97 or more

[SC]

Q60. Who prepared the return that led the IRS to issue the most recent notice? Was it:

- 1 I (myself)
- 2 A tax professional
- 3 The IRS
- 4 Other (specify)_____

[TXT, IF Q58A = 3]

Q61. Why was your issue NOT resolved?

[MC, ALLOW TWO RESPONSES MAX, ROTATE RESPONSES A-D]

Q62. Which of the following do you think will help the IRS improve the notices process? Please pick the top two improvement areas

The IRS should . . .

- a. offer online tools to resolve issues
- b. issue notices more quickly
- c. acknowledge information was received
- d. process information more quickly
- e. do something else (specify)_____

[SC]

Q63. Thinking about all aspects of your most recent experience with an IRS notice, please rate your satisfaction with resolving your notice.

- 1 Very dissatisfied
- 2 Dissatisfied
- 3 Neither satisfied nor dissatisfied (neutral)
- 4 Satisfied
- 5 Very satisfied

VI. OVERALL SATISFACTION: ALL RESPONDENTS

[PROMPT]

[SC, IF XIRS = 3]

Q71a Here is a question for you about the Spanish-language assistance you received. Please rate your OVERALL satisfaction with the Spanish-language assistance you received from the IRS for your 2008 federal taxes.

- 1 Very dissatisfied
- 2 Dissatisfied
- 3 Neither satisfied nor dissatisfied (neutral)
- 4 Satisfied
- 5 Very Satisfied

[PROMPT]

[SC]

Q71b. Here is a question for you about your overall tax experience. Considering all factors you have mentioned, please rate your OVERALL satisfaction with filing your 2008 federal taxes.

- 1 Very dissatisfied
- 2 Dissatisfied
- 3 Neither satisfied nor dissatisfied (neutral)
- 4 Satisfied
- 5 Very Satisfied

[TXT]

Q72. What could the IRS have done to improve your experience with your 2008 taxes? If you have no suggestions, please enter "None".

VII. PSYCHOGRAPHIC QUESTIONS

Please indicate the extent to which you agree or disagree with each of the following statements.

	Strongly Agree	Somewhat Agree	Neither Agree nor Disagree	Somewhat Disagree	Strongly Disagree
a. I enjoy doing research on the Internet					
b. I enjoy managing my household finances					
c. I wish I had a better understanding of my finances					
d. I feel confident in my own ability to solve financial problems that come up in my everyday life					
e. I pay my bills on time					
f. I usually pay my bills using the Internet					
g. I don't feel secure sharing personal financial information over the Internet					
h. I do not mind paying my fair share of taxes					
i. I think preparing tax returns should be made easier					
j. I think electronic filing should be free to everyone					
k. I think there should be a flat rate income tax					
l. I think income taxes should be completely eliminated					
m. I think there should be a national sales tax					
n. I think refunds should be made quicker					

VIII. DEMOGRAPHICS: ALL RESPONDENTS

D1. Here are a few questions for classification purposes only.

Do you have a computer at home?

- 1 Yes
- 2 No

D2.1. Do you access the Internet apart from taking surveys via Knowledge Networks?

- 1 Yes
- 2 No

[MC]

D2. Where do you access the Internet?

- 1. From home
- 2. from work
- 3. from public library or other place(e.g. school, internet café, etc)
- 4. I do not access the Internet
- 5. Cell phone\BlackBerry\PDA

[IF Q2C = 1 AND D2 = 4, MC]

D2chk Earlier you indicated you visited the IRS web site to obtain information and you just now indicated you do not access the Internet. Where did you access the IRS web site?

- 1. From home
- 2. from work
- 3. from public library or other place (e.g. school, internet café, etc)
- 4. I do not access the Internet
- 5. Cell phone\BlackBerry\PDA
- 6. Other explanation (specify)

D5. What is the highest level of education you have completed?

- 1 Less than 9th grade
- 2 9th grade to 12th grade, no diploma
- 3 High school graduate/GED
- 4 Some technical/vocational school
- 5 Technical or vocational school graduate
- 6 Some college, no degree
- 7 Associate Degree
- 8 Bachelor's Degree
- 9 Master's Degree
- 10 Post-Master's Degree

[MC]

D6. Do you have any of the following long-term conditions (lasting 6 months or more)? **Please note all that apply.**

- 1 Blindness **[DO NOT SHOW TO ANYONE, BUT HAVE A VALUE FOR IT!]**
- 2 Deafness
- 3 Severe Vision Impairment
- 4 Severe Hearing Impairment
- 5 Severe Speech Impairment
- 6 A condition that substantially limits your physical abilities (such as standing or walking)
- 7 A condition that limits learning or remembering
- 8 Some other condition\None of the above
- 9 Do not have a long-term condition **[SC]**

[IF D6 = 1-8]

D6a. Does your disability prevent you from going outside of your home?

- 1 Yes
- 2 No

[SC]

D7. What is your employment status?

- 1 Work full-time
- 2 Work part-time
- 3 Retired
- 4 Full-time student
- 5 Unemployed, looking for work
- 6 Employed in the home/homemaker (for example, a stay at home parent) Programmer:
- 7 Other

D8. Did you report having any dependents on your 2008 tax return?

- 1 Yes
- 2 No

D9. Which of the following categories best describes your household income before taxes for 2008?

- 1 Less than \$10,000
- 2 \$10,000 to less than \$15,000
- 3 \$15,000 to less than \$25,000
- 4 \$25,000 to less than \$35,000
- 5 \$35,000 to less than \$50,000
- 6 \$50,000 to less than \$75,000
- 7 \$75,000 to less than \$100,000
- 8 \$100,000 to less than \$150,000
- 9 \$150,000 to less than \$200,000
- 10 \$200,000 to less than \$1 million
- 11 \$1 million or more

D10. Do you speak a language other than English at home?

- 1 Yes
- 2 No

[IF XIRS = 3]

D11. What is your country of origin?

- 1 Argentina
- 2 Colombia
- 3 Cuba
- 4 Dominican Republic
- 5 Ecuador
- 6 El Salvador
- 7 Guatemala
- 8 Honduras
- 9 Mexico
- 10 Nicaragua
- 11 Peru
- 12 Puerto Rico
- 13 Spain
- 14 United States
- 15 Venezuela
- 16 Other (Please specify)