



2009 e-Services Customer Satisfaction Survey

OMB #1545-1432
RMR #9-08-244
Fall-Winter, 2009-2010
PAGE 1 (C1)

RESPONDENT ID# _____ (05-08)

CIRCLE SAMPLE TYPE... **Heavy Users** (n=500).....1 ...09
Medium-Level Users (n=500).....2
Low-Level Users (n=400).....3
Eligible Non-Users (n=500).....4

PHONE # (AC-_____) _____

CITY _____ ST _____ ZIP _____ ST CODE _____

AREA: Area 1.....1 Area 2.....2 Area 3.....3 Area 4.....4 Area 5.....5 ...10

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

			<u>Disc</u>	<u>NA</u>	<u>Unavail</u>	<u>Ref</u>	<u>NO</u>	<u>Comp</u>	
1	DATE: _____	TIME: _____ (am) (pm)	1	2	3	4	5	6	...11
2	DATE: _____	TIME: _____ (am) (pm)	1	2	3	4	5	6	...12
3	DATE: _____	TIME: _____ (am) (pm)	1	2	3	4	5	6	...13
4	DATE: _____	TIME: _____ (am) (pm)	1	2	3	4	5	6	...14
5	DATE: _____	TIME: _____ (am) (pm)	1	2	3	4	5	6	...15
6	DATE: _____	TIME: _____ (am) (pm)	1	2	3	4	5	6	...16
7	DATE: _____	TIME: _____ (am) (pm)	1	2	3	4	5	6	...17
8	DATE: _____	TIME: _____ (am) (pm)	1	2	3	4	5	6	...18
9	DATE: _____	TIME: _____ (am) (pm)	1	2	3	4	5	6	...19
10	DATE: _____	TIME: _____ (am) (pm)	1	2	3	4	5	6	...20

INTERVIEWER _____

INTRODUCTION:

Hello, I'm _____ of Russell Research in New York, an independent national survey firm. May I speak with... (PERSON ON LIST. AFTER REACHING HIM/HER, CONTINUE WITH...) Thank you for taking my call.

The Internal Revenue Service has asked Russell Research to conduct a major national survey, the results of which will be used by the IRS to better understand the needs of Tax Professionals. You may have read about the survey at irs.gov.

We'd like you to participate in the survey, but participation is entirely voluntary. In addition, we assure you that your and your firm's identity will never be disclosed to the IRS or anyone else and that your responses to the survey will never be associated with you or your firm. The survey will take approximately 15 minutes to complete. Would you be willing to participate? (IF "YES", CONTINUE. IF "NO", THANK & RECORD AS "Ref" IN BOX. IF "YES", CONTINUE.)

NOTE: HERE IS THE WORDING USED AT THE E-SERVICES LOG-ON POINT AT irs.gov TO ALERT TAX PROFESSIONALS TO THE SATISFACTION SURVEY:

Attention e-Services users! You may be contacted via telephone to participate in an e-Services user satisfaction survey by Russell Research, an independent national survey firm. Your participation is optional and all answers you provide will be anonymous. The Internal Revenue Service has asked Russell Research to contact users to measure user satisfaction with e-Services and to identify areas for improvement or possible future enhancements to the program. Thank you in advance for participating in this important exercise.

ALL RESPONDENTS ON THE IRS LISTS QUALIFY FOR THE SURVEY. IF RESPONDENT AGREES TO PARTICIPATE, CONTINUE WITH: **The focus of our survey today is the e-Services program of the IRS. Let me read a description of the e-Services program.** READ THE FOLLOWING DESCRIPTION TO RESPONDENT:

The IRS’s e-Services program is a suite of web-based products that allows registered tax professionals and taxpayers to electronically interact with and conduct business with the IRS. The e-Services suite of services includes e-Services Registration, PTIN Application, Online e-file Application, Disclosure Authorization, Electronic Account Resolution, Transcript Delivery Service, and Taxpayer Identification Number (TIN) Matching.

- **All tax professionals registered with e-Services can use the Registration, PTIN Application, and Online e-file Application services.**
- **And, all e-file providers who e-file 5 or more accepted returns a year can use the Disclosure Authorization, Electronic Account Resolution, and Transcript Delivery System services.**
- **In addition, any taxpayer of income subject to backup withholding or their reporting agents can use the Taxpayer Identification Number or TIN Matching service.**

ASK Q1A OF ALL CELLS TO GET AT PRIOR AWARENESS AMONG NON-USERS; USERS SHOULD ANSWER YES TO Q1A THOUGH IF ANY DO NOT, CONTINUE WITH THE USER SECTION OF THE SURVEY SINCE THEY MAY THINK OF E-SERVICES BY THE NAME OF A PARTICULAR SERVICE THEY USE (E.G., MAY THINK OF IT AS THE “TRANSCRIPT DELIVERY SYSTEM”).

1A. Prior to today, were you aware of the IRS’s e-Services program? (CIRCLE ANSWER BELOW.)

Yes (CONTINUE WITH Q1B)..... 1 ...00
 No (CONTINUE WITH Q2)..... 2

1B. IF “YES” TO Q1A, ASK: I’m going to read a list of possible ways in which you may have first learned about the IRS’s e-Services program. Please tell me if you first learned about e-Services from any of the following sources? If you first learned about e-Services through some source that is not on this list, please tell me what that source was. (STARTING AT PRE-CHECK, READ CHOICES AND CIRCLE ALL THAT APPLY BELOW.)

- An IRS Publication..... 1 ...00
- An IRS Tax Forum..... 2
- At IRS.gov..... 3
- From A Colleague..... 4
- At A Local Taxpayer Assistance Center..... 5
- (AFTER READING ALL OF LIST, PROBE FOR:) Other Sources Not On List (SPECIFY)
- _____ x
- _____ x

ASK Q2 OF ALL CELLS TO IDENTIFY THOSE NON-USERS WHO HAVE ONLY REGISTERED AND DO NOT USE REGULARLY. USERS SHOULD ANSWER “YES” - THOUGH IF ANY DO NOT, CONTINUE WITH THE USER SECTION OF THE SURVEY SINCE THEY MAY BE USING E-SERVICES UNDER THE DELEGATION OF AUTHORITY FEATURE AND MAY NOT BE PERSONALLY REGISTERED.

2. Are you personally registered as a user of e-Services? (CIRCLE ANSWER)

Yes (CONTINUE WITH Q3)..... 1 ...00
 No (CONTINUE WITH Q3)..... 2

ASK Q3 OF ALL CELLS TO DETERMINE WHETHER ANY ARE NON-REGISTRANTS USING UNDER DELEGATION OF AUTHORITY.

3. Do you ever access the e-Services site as a result of being delegated the authority to do so by another member of your firm or organization? (CIRCLE ANSWER BELOW.)

Yes (CONTINUE WITH USER/NON-USER SECTION APPROPRIATE TO LIST)..... 1 ...00
 No (CONTINUE WITH USER/NON-USER SECTION APPROPRIATE TO LIST)..... 2

INTERVIEWER: IF RESPONDENT IS FROM A LIST LABELLED “Heavy Users”, “Medium-Level Users”, or “Low-Level Users”, CONTINUE WITH “USER” SECTION OF SURVEY (Qs 4-17). IF RESPONDENT IS FROM LIST LABELLED “Eligible Non-Users”, SKIP TO THE “NON-USER” SECTION OF SURVEY (AND ASK Qs 18-24 NEXT). WHEN FINISHED WITH APPROPRIATE SECTION, CONTINUE ALL RESPONDENTS THROUGH ALL REMAINING QUESTIONS, WHICH START AT Q24A. NOTE: IF RESPONSES INDICATE THAT A PERSON MAY HAVE BEEN MISTAKENLY INCLUDED IN THE WRONG LIST, COMPLETE THE INTERVIEW, BUT THEN SEE YOUR SUPERVISOR, WHO WILL REPORT THE INSTANCE AND BE DIRECTED TO KEEP/REPLACE THE SURVEY.

IF FROM "USER" LISTS, CONTINUE WITH USER SECTION - Qs 4-17.

4. **On average throughout the year, about how often would you say you access and use e-Services at the IRS website? Is that...**(READ CHOICES AND CIRCLE ONE ANSWER BELOW.)

- Once A Week Or More.....1 ...00
- Several Times A Month.....2
- About Once A Month.....3
- Several Times A Year.....4
- About Once A Year Or Less Often.....5
- (DON'T READ, BUT CIRCLE IF:) Don't Know/Can't Say.....y

5. **Thinking about the total e-Services program, including ALL of the specific services that you're familiar with, how satisfied are you with the e-Services program overall? Overall, would you say you are...**(READ CHOICES AND CIRCLE ONE ANSWER BELOW.)

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

6. **Thinking again about the total e-Services program, would you recommend e-Services to other professionals like yourself?** (CIRCLE ONE ANSWER BELOW.)

- Yes.....1 No.....2 (DON'T READ, BUT CIRCLE IF:) Don't Know/Can't Say y

7. **What, if anything, do you particularly like about the e-Services program overall? Please be as specific as possible.** (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.

8. **In your opinion, can the overall e-Services program be improved in any way at all?**

- Yes (ASK Q9).....1 No (SKIP TO Q10). 2 (DON'T READ:) Don't Know/Can't Say (SKIP TO Q10)..y

9. (IF "YES" TO Q8:) **In what specific ways should the e-Services program be improved?** (CAREFULLY ENTER EACH SUGGESTION SEPARATELY & ASK 2 PROBES FOR EACH ONE. AT END, PROBE FOR OTHERS.)

COMMENT #1: _____

PROBE: **Does that suggestion apply to all e-Services or just to a particular service within e-Services?**

CODE VS. LIST OF E-SERVICES.

All e-Services 1 A particular service2---PROBE: **Which one?** (ENTER)_____

COMMENT #2: _____

PROBE: **Does that suggestion apply to all e-Services or just to a particular service within e-Services?**

CODE VS. LIST OF E-SERVICES.

All e-Services 1 A particular service2---PROBE: **Which one?** (ENTER)_____

COMMENT #3:_____

PROBE: **Does that suggestion apply to all e-Services or just to a particular service within e-Services?**

CODE VS. LIST
OF E-SERVICES.

All e-Services 1 A particular service2---PROBE: **Which one?** (ENTER)_____

COMMENT #4:_____

PROBE: **Does that suggestion apply to all e-Services or just to a particular service within e-Services?**

CODE VS. LIST
OF E-SERVICES.

All e-Services 1 A particular service2---PROBE: **Which one?** (ENTER)_____

ASK ALL "USERS":

10. I'm going to read a list of different aspects of using the e-Services program. After I read each one, I'd like you to tell me how satisfied you are with that aspect of the e-Services program, using a rating scale of Very Satisfied, Somewhat Satisfied, Somewhat Dissatisfied, or Very Dissatisfied. Let's start with...(ROTATING THE LIST OF ATTRIBUTES, READ EACH ONE, AND SECURE RATING FOR EACH. RE-READ RATING SCALE WHENEVER IT APPEARS TO BE NECESSARY.)

	Very Satisfied	Some-what Satisfied	Somewhat Dis-satisfied	Very Dis-satisfied	Don't Know	Read: Can't Say	
<input type="checkbox"/> —Ease Of Getting Started With e-Services.....	4	3	2	1	y		...00
<input type="checkbox"/> —Availability Of Help At The e-Services Help Desk.....	4	3	2	1	y		...00
<input type="checkbox"/> —Overall Appearance Of The e-Services Site.....	4	3	2	1	y		...00
<input type="checkbox"/> —On-Screen Instructions At The e-Services Site.....	4	3	2	1	y		...00
<input type="checkbox"/> —Ease Of Navigation Of The e-Services Site.....	4	3	2	1	y		...00
<input type="checkbox"/> —Level Of Security Provided By The e-Services Site.....	4	3	2	1	y		...00
<input type="checkbox"/> —Availability Of Specific Services That You Need.....	4	3	2	1	y	Q16	...00
<input type="checkbox"/> —Ease Of Understanding Of The Content At The e-Services Site	4	3	2	1	y		...00
<input type="checkbox"/> —Having The Type Of Information That You Need.....	4	3	2	1	y		...00
<input type="checkbox"/> —How Long It Takes To Find Information You're Looking For.....	4	3	2	1	y		...00
<input type="checkbox"/> —How Long It Takes To Complete An Action.....	4	3	2	1	y		...00
<input type="checkbox"/> —How Long It Takes To Get A Response/Acknowledgment.....	4	3	2	1	y		...00
<input type="checkbox"/> —Ease Of Understanding e-Services Error Messages.....	4	3	2	1	y		...00
<input type="checkbox"/> —Ease Of Understanding e-Services Reject Codes.....	4	3	2	1	y		...00
<input type="checkbox"/> —Speed In Transmission Of Data/Forms/Information.....	4	3	2	1	y		...00
<input type="checkbox"/> —Ease Of Log-In/Identification.....	4	3	2	1	y		...00
<input type="checkbox"/> —The Need To Re-Set Your Password Every 6 Months.....	4	3	2	1	y	Q11A	...00
<input type="checkbox"/> —Determining The Status Of Your Actions/Queries.....	4	3	2	1	y		...00
<input type="checkbox"/> —Tutorials At The Site For Different e-Services.....	4	3	2	1	y	Q11B	...00

11A. (IF LESS THAN "VERY SATISFIED" WITH "NEED TO RE-SET PASSWORD EVERY 6 MOS." IN Q. 10, ASK:) **indicated that you're not fully satisfied with the need to re-set your password every 6 months. How would you change this to make the password re-set period more suitable to you?** (ENTER RESPONSE BELOW AND THEN PROBE AS DIRECTED.)

(PROBE WITH:) **Thinking of other websites you access that require password re-set to secure sensitive data that is not your own, what would you say is the typical time period after which you have to re-set your password?** (ENTER RESPONSE AND CIRCLE WHETHER IT IS WEEKS, MONTHS, YEARS.)

_____ (weeks) (months) (years)

(INTERVIEWER: CLICK HERE IF:) Respondent doesn't access other websites for sensitive data not their own0
...00

11B. (IF LESS THAN "VERY SATISFIED" WITH "TUTORIALS AT THE SITE..." IN Q. 10, ASK:) **You indicated that you're not fully satisfied with the tutorials that are available at the e-Services site at irs.gov. Please tell me which of the following specific tutorials need improvement.** (STARTING AT PRE-CHECK, READ LIST AND CIRCLE ALL THAT APPLY.)

- The Tutorial For e-Services Registration.....1 ...00
- The Tutorial For PTIN Application.....2
- The Tutorial For Online *e-file* Application.....3
- The Tutorial For Disclosure Authorization.....4
- The Tutorial For Electronic Account Resolution.....5
- The Tutorial For Transcript Delivery System.....6
- The Tutorial For Taxpayer Identification Number (TIN) Matching.....7
- READ LAST: The Overall Tutorial For Use Of The Full Suite Of e-Services ...8

ASK ALL "USERS":

11C. We have talked about the tutorials available at the e-Services site. Next, using a "yes" or "no" response, please indicate whether you are aware that you can also get training or information on the use of e-Services from any of the following other sources. (STARTING AT PRE-CHECK, READ LIST AND CIRCLE ALL THAT APPLY.)

- | | <u>Yes</u> | <u>No</u> | |
|--|------------|-----------|-------|
| <input type="checkbox"/> IRS Nationwide Tax Forums.....1 | 2 | | ...00 |
| <input type="checkbox"/> Small Business Tax Workshop.....1 | 2 | | ...00 |
| <input type="checkbox"/> Tax Practitioner Institute Seminars.....1 | 2 | | ...00 |
| <input type="checkbox"/> Practitioner Liaison Meetings.....1 | 2 | | ...00 |
| <input type="checkbox"/> National Or Local Phone Forums & Webinars For Practitioners. .1 | 2 | | ...00 |
| <input type="checkbox"/> Tax Practitioner Video & Audio Presentations.....1 | 2 | | ...00 |

11D. Think about what it's like to use e-Services and tell me what, if any, types or forms of training might be helpful to you. (ENTER RESPONSES BELOW, SEPARATELY, AND MAKE SURE WE CAN UNDERSTAND THE SUGGESTION. BE SURE TO PROBE UNTIL NO FURTHER SUGGESTIONS ARE OFFERED.)

(PROBE:) **Any other suggestions for types or forms of training?** _____

12. Which of the following specific e-Services have you ever used? (ROTATE AND READ LIST & CIRCLE ALL THAT APPLY UNDER COL. 12 BELOW.)

13. (FOR EACH SERVICE CIRCLED AS EVER USED IN Q12, ASK:) **About how often do you use the... (INSERT NAME OF SERVICE) service at the e-Services site at irs.gov? Is that...**(READ FREQUENCY SCALE AND CIRCLE ONLY ONE ANSWER FOR EACH SERVICE.)

	<u>Col. 12</u> e-Services Ever Used	Once A Week Or <u>More</u>	Several Times A <u>Month</u>	About Once A <u>Month</u>	Several Times A <u>Year</u>	About Once A Year Or Less <u>Often</u>	Don't Read: DK/ Can't Say	
<input type="checkbox"/> e-Services Registration.....1	1	1	2	3	4	5	y	...00-00
<input type="checkbox"/> PTIN Application.....2		1	2	3	4	5	y	...00
<input type="checkbox"/> Online <i>e-file</i> Application.....3		1	2	3	4	5	y	...00
<input type="checkbox"/> Disclosure Authorization.....4		1	2	3	4	5	y	...00 Q17
<input type="checkbox"/> Electronic Account Resolution.....5		1	2	3	4	5	y	...00
<input type="checkbox"/> Transcript Delivery System.....6		1	2	3	4	5	y	...00
<input type="checkbox"/> Taxpayer Identification Number (TIN) Matching7		1	2	3	4	5	y	...00

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

WHEN PROBING, ASK RESPONDENT TO BE SPECIFIC AS POSSIBLE. DO NOT STOP AT GENERAL ANSWERS.

20. — What would you say are the two most important reasons that you are not using e-Services or not using e-Services more often? (ENTER 2 RESPONSES VERBATIM BELOW & PROBE EACH UNTIL RESPONSE IS EXHAUSTED.)

1) _____

(PROBE FURTHER:) _____

2) _____

(PROBE FURTHER:) _____

21. — And is there anything that you can think of that the IRS can do that would make you more interested in using e-Services, or using e-Services more often? If so, what is it? (ENTER & PROBE.)

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

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

22. Earlier, we talked about the overall e-Services program. Now I'd like to read a more detailed description of each of the services available to you in the e-Services program at irs.gov, and ask you a couple of questions about each one. (READ VERBATIM DESCRIPTION OF EACH SERVICE BELOW. BE PREPARED TO RE-READ A DESCRIPTION IF RESPONDENT APPEARS TO HAVE NOT ABSORBED IT. **AFTER READING E-A-C-H DESCRIPTION, ASK Qs 23-24 IN SEQUENCE** BEFORE MOVING TO THE NEXT SERVICE.)

- ① **e-Services Registration** is a one-time, online process where you select a username, password and signature PIN. Successful registration is acknowledged onscreen and a confirmation letter is sent to your home.
- ② The **PTIN Application** enables a Preparer to obtain a Preparer Tax ID Number for use on client returns instead of their SSN. A PTIN ID card can also be requested.
- ③ The **Online e-file Application** allows the principal or responsible official of a firm to apply for participation in IRS *e-file*. Approved applications can be maintained by certain users and the ability to delegate e-Services incentive product access to other employees also exists.
- ④ The **Disclosure Authorization** service enables you to view, modify, and submit new or existing Powers of Attorney or Tax Information Authorizations receiving immediate acknowledgement of acceptance.
- ⑤ The **Electronic Account Resolution** service enables you to submit taxpayer account inquiries and receive a written response in your secure online mailbox within 3 business days. You must have a Power of Attorney, Form 2848, on file for the particular taxpayer, form, and tax period requested.
- ⑥ The **Transcript Delivery System** service enables you to submit requests and view online, taxpayer account transcripts, wage & income documents, return transcripts, and verification of non-filing letters. You must have a Power of Attorney, Form 2848, on file for the particular taxpayer, form, and tax period requested.
- ⑦ **TIN Matching** is a pre-filing service used to validate **Taxpayer ID Numbers**. It is available to Payers of income subject to backup withholding who filed within the past two years, any one of six information returns: Forms 1099-B, INT, DIV, OID, PATR, or MISC. You can match up to 25 payee TIN & name combinations in an *Interactive* online request or you can submit a *Bulk* file of up to 100,000 TIN and name combinations. Interactive requests are processed immediately and bulk requests can take up to 24 hours. Responses to both types of requests are delivered online.

23. Based upon the description, is this a service that you personally would qualify to use? (CIRCLE YES/NO FOR THIS SERVICE UNDER LINE "Q23" IN RESPONSE GRID BELOW.)

24. (FOLLOW IMMEDIATELY WITH:) Assuming you did qualify to use this service, how likely would you be to use it, or use it more, in the future - Very Likely, Somewhat Likely, Not Very Likely, or Not At All Likely? (CIRCLE ONE ANSWER FOR THIS SERVICE UNDER LINE "Q24" IN RESPONSE GRID BELOW.)

	①	②	③	④	⑤	⑥	⑦
	e-Services Regi- stration	PTIN Appli- cation	Online e-file Application	Disclosure Authori- zation	Electronic Account Resolution	Trans- script Delivery System	Taxpayer ID Number (TIN) Matching
Q23—WOULD YOU QUALIFY FOR THIS SERVICE?							
Yes.....	1	1	1	1	1	1	1
No.....	2	2	2	2	2	2	2
(DON'T READ:) Don't Know/Can't Say.....	y	y	y	y	y	y	y
Q24—LIKELIHOOD OF FUTURE USE OF THIS SERVICE:							
Very Likely.....	4	4	4	4	4	4	4
Somewhat Likely.....	3	3	3	3	3	3	3
Not Very Likely.....	2	2	2	2	2	2	2
Not At All Likely.....	1	1	1	1	1	1	1

(DON'T READ:) Don't Know/Can't Say.....y y y y y y y

Qs 24A-B-C-D ARE ABOUT E-NOTICES AND FIRST APPEARED IN THE STUDY IN 2008. THESE NEW QUESTIONS ARE NUMBERED AS QUESTION 24, A...D, TO MAINTAIN (FOR TAB EFFICIENCY) THE ORIGINAL "Q" NUMBERING SCHEME.

READ: These next questions are to determine the level of interest in potential future services.

24A. If the IRS were to provide an e-Services capability allowing authorized Practitioners and other Third Parties to receive their copies of Taxpayer account notices such as balance due or math error notices electronically, how likely would you be to choose this option instead of receiving paper notices? Would you be...(READ CHOICES AND CIRCLE ONE ANSWER BELOW.)

- Very Likely..... 4 ...00
- Somewhat Likely..... 3
- Not Very Likely..... 2
- Not At All Likely..... 1
- Or, Are You Not Authorized To Receive Any Taxpayer Notices..... y

24B. Consider this next question from the viewpoint of a Business Taxpayer. If you had the option to receive your Business tax account notices electronically, how likely would you be to choose this option instead of receiving paper notices? (READ CHOICES AND CIRCLE ONE ANSWER BELOW.)

- Very Likely..... 4 ...00
- Somewhat Likely..... 3
- Not Very Likely..... 2
- Not At All Likely..... 1
- (DON'T READ:) Don't Know/Cannot Say..... y

24C. Now, consider the question from the viewpoint of an Individual Taxpayer. If you had the option to receive your Individual tax account notices electronically, how likely would you be to choose this option instead of receiving paper notices? (READ CHOICES AND CIRCLE ONE ANSWER BELOW.)

- Very Likely..... 4 ...00
- Somewhat Likely..... 3
- Not Very Likely..... 2
- Not At All Likely..... 1
- (DON'T READ:) Don't Know/Cannot Say..... y

24D. If it were necessary for you to [FOR ALL USER GROUPS: (access)] [FOR NON-USERS: (register for and access)] e-Services to retrieve electronic notices from a secure mailbox, after receiving an e-mail or other electronic notification that "You've Got Mail", how likely would you be to choose this option instead of receiving paper notices? (READ CHOICES AND CIRCLE ONE ANSWER BELOW.)

- Very Likely..... 4 ...00
- Somewhat Likely..... 3
- Not Very Likely..... 2
- Not At All Likely..... 1
- (DON'T READ:) Don't Know/Cannot Say..... y

READ: These last questions are about you and/or your firm and are used for analytical purposes only.

25. First, which of the following best describes you and the primary focus of your work? Are you primarily...? (READ CHOICES & CIRCLE ONE ANSWER BELOW.)

Client Note: Remaining Questions Used For Profiling Users/Non-Users

3

- A Person Responsible For Tax Reporting & Preparation For One Company (BUSINESS TAXPAYERS) 1.....00
A Professional In A Tax And Payroll Reporting Service (REPORTING AGENTS).....2
A Person Being Interviewed Here On Behalf Of A Chain Of Tax Preparation Firms (BIG TWO/ETC.) 3
A Professional Tax Preparer.....4
A Financial Planner, With Tax Preparation Being Just One Of Your Services.....5
An Accountant or CPA, With Tax Preparation Being Just One Of Your Services.....6
Or Some Other Type Of Professional, With Tax Preparation Being Just One Of Your Services (SPECIFY: What Type Of Profession?).....X

IF RESPONDENT IS ANY OF THE ABOVE [LEFT BRACKETED] TYPES, ASK Qs 26-28:

26. Which of the following best describes your tax preparation work? (READ & CIRCLE ONE.)

- It's A Full-Time Occupation For Me.....1
It's One Of My Occupations, And I Do Other Kinds Of Work.....2
It's Something I Only Do During Tax Season.....3

...00
...00

27. How many years have you been involved in tax preparation? (READ & CIRCLE ONE.)

- 1-4 years.....1
5-9 years.....2
10-19 years.....3
20-29 years.....4
30 years or more.....5
(DON'T OFFER AS A CHOICE, BUT CIRCLE IF:) Refused.....y

...00

28. When you do tax preparation work, do you work alone as an independent, do you work with a firm, or do you work both as an independent and with a firm? (CIRCLE ONE.)

- Work Alone As An Independent.....1
Work With A Firm.....2
Both As An Independent & With A Firm.....3
(DON'T OFFER AS A CHOICE, BUT CIRCLE IF:) Refused.....y

...00

IF RESPONDENT IS ANY OF THE ABOVE [RIGHT BRACKETED] TYPES, ASK Qs 29-32:

29. In total, including yourself, approximately how many active Tax Preparers work for your firm at all of its locations in the U.S.? (ENTER NUMBER BELOW. REPEAT # AND ASK RESPONDENT TO CONFIRM IT.)

TOTAL ACTIVE TAX PREPARERS WORKING FOR FIRM.....

...00-00

30. And approximately how many total FEDERAL tax returns - including both quarterly and annual Business Returns and Individual Returns -- were prepared last tax season, that is, in 2009 for Tax Year 2008, by all of the Preparers at all of the locations of your firm throughout the U.S., including yourself? (ENTER # BELOW & ASK RESPONDENT TO CONFIRM IT.)

TOTAL FEDERAL TAX RETURNS PRE'D. BY FIRM/INCLUDING SELF
...00-00

31. Approximately what percent of your firm's FEDERAL Tax Preparation business in 2009 was Individual FEDERAL Tax Return Preparation and what percent was Business FEDERAL Tax Return Preparation? (ENTER % FOR EACH - MUST ADD TO 100%.)

% INDIVIDUAL RETURNS... ..00-00 % BUSINESS RETURNS... ..00-00

00-00

32.—(IF EITHER “INDIVIDUAL” OR “BUSINESS” HAVE 1%+ ABOVE FOR **2009**, ASK FOR PERCENT OF EACH THAT WERE E-FILE, AS FOLLOWS:) **And approximately what percent of your firm’s 2009 FEDERAL (Individual) (Business) Tax Returns were ~~prepared~~electronically filed, using e-file?** (ENTER % E-FILE FOR EACH TYPE OF RETURN WITH 1%+ IN QUESTION ABOVE & REPEAT PERCENT AND ASK RESPONDENT TO CONFIRM IT.)

00-00 % INDIVIDUAL RETURNS E-FILED...____ ...00-00 % BUSINESS RETURNS E-FILED...____ ...00-00 ...

FOLLOWUP QUESTIONS TO Q32 HAVE BEEN ELIMINATED IN 2009:

Client Note: Qs 33 and 34 were used in the Benchmark study to see if there was any correlation between e-file usage (Q32 ABOVE) and satisfaction (Qs 33-34 BELOW) and e-Services usage/interest/frequency. Results of that study showed there was NO SUCH CORRELATION. We have

33. (IF % FOR **INDIVIDUAL** RETURNS e-filed IN Q32 WAS 1% OR HIGHER, ASK:) **In general, how satisfied are you with electronic filing of Individual Federal Tax Returns and Forms. Would you say you are...?** (READ CHOICES & CIRCLE ONLY ONE ANSWER BELOW.)

- Very Satisfied.....4 ...00
- Somewhat Satisfied.....3
- Not Very Satisfied.....2
- Not At All Satisfied.....1
- (DON'T OFFER AS A CHOICE, BUT CIRCLE IF:) Don't Know/Can't Say.....y

34. (IF % FOR **BUSINESS** RETURNS e-filed IN Q32 WAS 1% OR HIGHER, ASK:) **In general, how satisfied are you with electronic filing of Business Federal Tax Returns and Forms. Would you say you are...?** (READ CHOICES & CIRCLE ONLY ONE ANSWER BELOW.)

- Very Satisfied.....4 ...00
- Somewhat Satisfied.....3
- Not Very Satisfied.....2
- Not At All Satisfied.....1
- (DON'T OFFER AS A CHOICE, BUT CIRCLE IF:) Don't Know/Can't Say.....y

REMAINING QUESTIONS ARE ASKED OF ALL RESPONDENTS:

35. **Next, in total, including yourself, tax preparers, and all other types of employees, how many people in total are employed by your firm at all of its locations in the U.S.?** (ENTER NUMBER BELOW. REPEAT # AND ASK RESPONDENT TO CONFIRM IT.)

00-00 TOTAL EMPLOYEES IN FIRM, INCLUDING SELF... ..

36. **Are you currently a member of any of the following national and/or state tax-related trade or professional organizations?** (DON'T READ CHOICES - CIRCLE OR ENTER ALL THAT APPLY BELOW.)

- AARP Tax Aide.....1 ...00
- American Association Of Attorneys--CPAs or AACPA.....2
- American Institute Of CPAs or AICPA.....3
- American Payroll Association or APA.....4
- Association Of Payroll Management or ASPM.....5
- CERCA or the Council for Electronic Revenue Communication Advancement..6
- Federation Of Tax Administrators or NFTA.....7
- National Association Of Tax Practitioners or NATP.....8
- National Society Of Accountants or NSA.....9
- National Association Of Enrolled Agents or NAEA.....0
- National Center For Professional Education or NCPE.....1 ...00
- National Association Of Computerized Tax Processors or NACTP.....2
- Others (SPECIFY).....x
- None/Don't Belong To Any Tax-Related Trade Or Professional Organization...y

37.— Finally, just a few more questions. These are about you and your interests. Your responses to these questions will, of course, never be identified with you personally and will be used only in aggregate with the responses of all other survey participants, and for analytical purposes only.

Client Note: Qs. 38-40 are used to see if IRS can learn from the website/online preferences of the target audience

38.— First, let me read a short list of different types of Internet or Online services or sites. After I read each one, please tell me whether you ever use that type of Online service or site. (READ LIST & CIRCLE ALL THAT APPLY UNDER COL. 38 BELOW. THEN ASK Q39.)

39.— (FOR EACH ONLINE SERVICE/ACTIVITY CIRCLED AS EVER USED IN Q38, ASK:) **About how often do you use...(INSERT NAME OF SERVICE)? Is that...**(READ FREQUENCY SCALE AND CIRCLE ONLY ONE ANSWER FOR EACH SERVICE/ACTIVITY UNDER COL. 39.)

		-----Col. 39-----						
Col. 38 Online Services/Sites Ever Used		At Least Once A Day	Several Times A Week Or More	About Once A Week	Several Times A Month	About Once A Month	Less Often	
<input type="checkbox"/>	Online Shopping Websites.....	1	2	3	4	5	6	...00-
	00							
<input type="checkbox"/>	Online Service Sites Such As Photo Archives, Memorials, etc.	2	1	2	3	4	5	6
	00							
<input type="checkbox"/>	Online Banking.....	1	2	3	4	5	6	...00
<input type="checkbox"/>	Online Blogs, Weblogs, or Discussion Sites.....	1	2	3	4	5	6	...00
<input type="checkbox"/>	Online Credit Card Records & Points Accumulation Sites.....	1	2	3	4	5	6	...00
<input type="checkbox"/>	Government Sites Other Than irs.gov or e-Services.....	1	2	3	4	5	6	...00

40.— (FOR EACH TYPE OF ONLINE SERVICE/SITE CIRCLED AS EVER USED IN Q38, ASK:) **You (also) mentioned that use (READ TYPE OF SITE). Of all of the different sites you've ever used for this online service/activity, which one would you say is the best at serving your needs?** (ENTER ONE SITE/ANSWER FOR EACH TYPE OF SERVICE/SITE IN THE APPROPRIATE SPACE BELOW. THEN, CONTINUE UNTIL YOU HAVE ASKED THIS QUESTION FOR EACH SERVICE/SITE CIRCLED IN Q38.)

THE BEST Online Shopping Website IS.....
.....

THE BEST Online Service Site Such As Photo Archives, Memorials, etc. IS.....
.....

THE BEST Online Banking Site IS.....
.....

THE BEST Online Blogs, Weblogs, or Discussion Site IS.....
.....

THE BEST Online Credit Card Records & Points Accumulation Site IS. . .
.....

THE BEST Government Site Other Than irs.gov or e-Services IS.....
.....

41.— Finally, for analytical purposes only - is your age...(READ LIST & CIRCLE ONE ANSWER.)

18-25.....	1	...00
26-35.....	2	
36-45.....	3	
46-55.....	4	
56-64.....	5	
65 Or Over.....	6	

42.— **CIRCLE GENDER** (WHICH SHOULD NOW BE APPARENT)...

Male.....	1	...00
Female.....	2	

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.*