

Shaping the Future with Your Opinions

XXXXXX-XXX-XXXXXX

The overall goal of this research is to help the IRS provide better service to you as a taxpayer. You can help the IRS improve its service to you and other taxpayers by answering the questions below. This voluntary survey takes about 5 minutes to complete. Your responses will be confidential, and only aggregate information will be provided to the IRS.

In thinking of your experiences, concentrate on the individual tax returns (i.e., W-2 filers) you have prepared in the past year.

1. Overall, how satisfied are you with the tax services provided by the IRS to you? (X ONE Box)

Very Dissatisfied ← 1 □ 2 □ 3 □ 4 □ 5 □ Very Satisfied

2a. Please indicate if you are aware of the IRS services listed below? (X ALL That Apply In Column "A")

2b. If you are aware of the service and have used it in the **past 12 months**, please indicate your satisfaction with the service. (X ONE Box In EACH Row In Column "B")

Are You Aware Of The Service?	"B"					
	Do Not Use	Very Dissatisfied	2	3	4	Very Satisfied
Yes						
IRS Web site (www.irs.gov).....	01 □	00 □	01 □	02 □	03 □	04 □
IRS Toll Free Telephone line.....	02 □	00 □	01 □	02 □	03 □	04 □
IRS Tax Publications.....	03 □	00 □	01 □	02 □	03 □	04 □
IRS Sponsored Events.....	04 □	00 □	01 □	02 □	03 □	04 □
IRS offices (walk-in and Taxpayer Assistance Centers).....	05 □	00 □	01 □	02 □	03 □	04 □
Written correspondence from IRS other than e-mail.....	06 □	00 □	01 □	02 □	03 □	04 □
E-mails from the IRS on complex issues.....	07 □	00 □	01 □	02 □	03 □	04 □
Communications with Taxpayer Advocate.....	07 □	00 □	01 □	02 □	03 □	04 □

3a. There are many resources available to taxpayers on the *IRS website*. Please indicate if you are aware of the *IRS website* resource listed below? (X ALL That Apply In Column "A")

3b. If you aware of the resource and have used it in the **past 12 months**, please indicate your satisfaction with the resource. (X ONE Box In EACH Row In Column "B")

Are You Aware Of The Resource?	"B"					
	Do Not Use	Very Dissatisfied	2	3	4	Very Satisfied
Yes						
IRS Web site as a whole (www.irs.gov).....	01 □	00 □	01 □	02 □	03 □	04 □
Online AMT (Alternative Minimum Tax) assistant calculator.....	02 □	00 □	01 □	02 □	03 □	04 □
Online EITC (Earned Income Tax Credit) assistant calculator.....	03 □	00 □	01 □	02 □	03 □	04 □
IRS E-services.....	04 □	00 □	01 □	02 □	03 □	04 □

4. There are many resources available *outside the IRS* that taxpayers can use to help them complete their tax returns. Please indicate if you have used each of the following resources in the past 12 months to help you complete a tax return. If you are not aware of the resource, please indicate that too. (X ONE Box for EACH Row)

	Have Used In The Past 12 Months	Have Not Used In The Past 12 Months	Not Aware
Non-IRS books and publications.....	1 □	2 □	3 □
Tax preparation software.....	1 □	2 □	3 □
Websites other than the IRS website.....	1 □	2 □	3 □
Professional associations or organizations for tax professionals, attorneys, or CPAs (e.g., National Association of Tax Professionals, American Institute of Certified Public Accountants, etc.)	1 □	2 □	3 □
Peers or colleagues.....	1 □	2 □	3 □

5. The following section is about *tax law* issues for which you may have sought assistance in the **past 12 months**. Please indicate whether or not you have sought assistance about the following *tax law* issues from the IRS and/or non-IRS sources. If no, please indicate that as well. (X ALL That Apply In EACH Row)

In the past 12 months...		
Sought Assistance from IRS Source	Sought Assistance from Non-IRS Source	Did Not Seek Assistance



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Alternative Minimum Tax.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Estate and Gift Taxes	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Retirement and pension income (including social security income)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Itemized deductions	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Definition of a child.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Earned Income Tax Credit.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Innocent Spouse Relief.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>
Other.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>

6. In the past 12 months, did you get *tax law information* from any of the following resources? (X ALL That Apply)

- 1 IRS Toll-Free telephone line
- 2 IRS offices (walk-in centers, or Taxpayer Assistance Centers)
- 3 IRS website (www.irs.gov)
- 4 E-mails from the IRS regarding tax law changes
- 5 Written correspondence from the IRS other than e-mail
- 6 IRS tax publications
- 7 Professional associations or organizations for tax professionals, attorneys, or CPAs (e.g., National Association of Tax Professionals, American Institute of Certified Public Accountants, etc.)
- 8 Professional tax research or preparation software
- 9 Peers and colleagues
- 10 Websites other than the IRS website
- 11 Other (please specify)

7. In the past 12 months, how often did you call the IRS tax telephone line? (X ONE Box)

- 1 Never
- 2 Less than 1 time
- 3 1-2 times
- 4 3-4 times
- 5 5 or more times
- 6 Don't know

8. Thinking back over the **past 12 months, how did you get your *tax forms and publications*? (X ALL That Apply)**

- 1 IRS, electronically
- 2 IRS, paper
- 3 Professional associations or organizations
- 4 Professional tax research or preparation software
- 5 Tax preparation software, e.g., Turbo Tax
- 6 Other
- 7 Don't know

9. Thinking about your experience with the IRS, how important would the following services be in improving your overall experience with them? (X ONE Box In EACH Row In Column "A")

Not Important	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	Very Important
Easy to use website.....	01 <input type="checkbox"/>	02 <input type="checkbox"/>	03 <input type="checkbox"/>	04 <input type="checkbox"/>
Minimal wait times on the phone.....	01 <input type="checkbox"/>	02 <input type="checkbox"/>	03 <input type="checkbox"/>	04 <input type="checkbox"/>
Reduced e-filing fees.....	01 <input type="checkbox"/>	02 <input type="checkbox"/>	03 <input type="checkbox"/>	04 <input type="checkbox"/>
Easy to understand forms.....	01 <input type="checkbox"/>	02 <input type="checkbox"/>	03 <input type="checkbox"/>	04 <input type="checkbox"/>
More helpful phone staff.....	01 <input type="checkbox"/>	02 <input type="checkbox"/>	03 <input type="checkbox"/>	04 <input type="checkbox"/>
More ways to get in touch with IRS staff.....	01 <input type="checkbox"/>	02 <input type="checkbox"/>	03 <input type="checkbox"/>	04 <input type="checkbox"/>
Quicker response times to questions . . .	01 <input type="checkbox"/>	02 <input type="checkbox"/>	03 <input type="checkbox"/>	04 <input type="checkbox"/>
Easy to use and comprehensive FAQs	01 <input type="checkbox"/>	02 <input type="checkbox"/>	03 <input type="checkbox"/>	04 <input type="checkbox"/>

10. How would you describe yourself? (X ONE Box In EACH Row)

	No – Does Not Describe Me	Yes – Does Describe Me
Seniors (65 years and above).....	1 <input type="checkbox"/>	2 <input type="checkbox"/>
Self-employed Schedule C filers/small business owners.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>
Active Military.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>
People with disabilities (vision, hearing, physical or mental)	1 <input type="checkbox"/>	2 <input type="checkbox"/>
Limited English Proficiency taxpayers.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>
Earned Income Tax Credit (EITC) recipients.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>
Other.....	1 <input type="checkbox"/>	2 <input type="checkbox"/>

Thank you for your help. Please return your completed questionnaire in the enclosed postage-paid envelope as soon as possible.

Privacy Statement

The authority requesting the information is 5 USC 301. The primary purpose of asking for the information is to determine steps IRS can take to improve our service to you. The information may be disclosed as authorized by the routine uses published for the Privacy Act System of Records entitled, Treas/IRS 00.001 Correspondence Files, including Stakeholder Partnership File, and Correspondence Control Files, as published in the Federal Register: December 10, 2001 (Volume 66, Number 237) [Notices] pages 63785-6. Providing the information is voluntary. Not answering some or all of the questions will not affect you.