



## Shaping the Future with Your Opinions

XXXXX-XXX-XXXXX

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** ←————→ **Very Satisfied**  
 1       2       3       4       5

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")

|  | "A"                           |                             | "B"   |                             |                             |                             |                             |
|--|-------------------------------|-----------------------------|---|-----------------------------|-----------------------------|-----------------------------|-----------------------------|
|  | Are You Aware Of The Service? |                             | If You Used The Service In The Past 12 Months, How Satisfied Were You With The Service? |                             |                             |                             |                             |
|  | Yes                           | Do Not Use                  | Very Dissatisfied   | 2                           | 3                           | 4                           | Very Satisfied              |
| IRS Web site (www.irs.gov).....                            | 01 <input type="checkbox"/>   | 00 <input type="checkbox"/> | 01 <input type="checkbox"/>   | 02 <input type="checkbox"/> | 03 <input type="checkbox"/> | 04 <input type="checkbox"/> | 05 <input type="checkbox"/> |
| IRS Toll Free Telephone line.....                          | 02 <input type="checkbox"/>   | 00 <input type="checkbox"/> | 01 <input type="checkbox"/>   | 02 <input type="checkbox"/> | 03 <input type="checkbox"/> | 04 <input type="checkbox"/> | 05 <input type="checkbox"/> |
| IRS Tax Publications.....                                  | 03 <input type="checkbox"/>   | 00 <input type="checkbox"/> | 01 <input type="checkbox"/>   | 02 <input type="checkbox"/> | 03 <input type="checkbox"/> | 04 <input type="checkbox"/> | 05 <input type="checkbox"/> |
| IRS Sponsored Events.....                                  | 04 <input type="checkbox"/>   | 00 <input type="checkbox"/> | 01 <input type="checkbox"/>   | 02 <input type="checkbox"/> | 03 <input type="checkbox"/> | 04 <input type="checkbox"/> | 05 <input type="checkbox"/> |
| IRS offices (walk-in and Taxpayer Assistance Centers)..... | 05 <input type="checkbox"/>   | 00 <input type="checkbox"/> | 01 <input type="checkbox"/>   | 02 <input type="checkbox"/> | 03 <input type="checkbox"/> | 04 <input type="checkbox"/> | 05 <input type="checkbox"/> |
| Written correspondence from IRS other than e-mail.....     | 06 <input type="checkbox"/>   | 00 <input type="checkbox"/> | 01 <input type="checkbox"/>   | 02 <input type="checkbox"/> | 03 <input type="checkbox"/> | 04 <input type="checkbox"/> | 05 <input type="checkbox"/> |
| E-mails from the IRS on complex issues.....                | 07 <input type="checkbox"/>   | 00 <input type="checkbox"/> | 01 <input type="checkbox"/>   | 02 <input type="checkbox"/> | 03 <input type="checkbox"/> | 04 <input type="checkbox"/> | 05 <input type="checkbox"/> |
| Communications with Taxpayer Advocate.....                 | 07 <input type="checkbox"/>   | 00 <input type="checkbox"/> | 01 <input type="checkbox"/>   | 02 <input type="checkbox"/> | 03 <input type="checkbox"/> | 04 <input type="checkbox"/> | 05 <input type="checkbox"/> |

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")

|  | "A"                            |                             | "B"   |                             |                             |                             |                             |
|--|--------------------------------|-----------------------------|---|-----------------------------|-----------------------------|-----------------------------|-----------------------------|
|  | Are You Aware Of The Resource? |                             | If You Used The Resource In The Past 12 Months, How Satisfied Were You With The Resource? |                             |                             |                             |                             |
|  | Yes                            | Do Not Use                  | Very Dissatisfied   | 2                           | 3                           | 4                           | Very Satisfied              |
| IRS Web site as a whole (www.irs.gov).....                       | 01 <input type="checkbox"/>    | 00 <input type="checkbox"/> | 01 <input type="checkbox"/>   | 02 <input type="checkbox"/> | 03 <input type="checkbox"/> | 04 <input type="checkbox"/> | 05 <input type="checkbox"/> |
| Online AMT (Alternative Minimum Tax) assistant calculator.....   | 02 <input type="checkbox"/>    | 00 <input type="checkbox"/> | 01 <input type="checkbox"/>   | 02 <input type="checkbox"/> | 03 <input type="checkbox"/> | 04 <input type="checkbox"/> | 05 <input type="checkbox"/> |
| Online EITC (Earned Income Tax Credit) assistant calculator..... | 03 <input type="checkbox"/>    | 00 <input type="checkbox"/> | 01 <input type="checkbox"/>   | 02 <input type="checkbox"/> | 03 <input type="checkbox"/> | 04 <input type="checkbox"/> | 05 <input type="checkbox"/> |
| IRS E-services.....  | 04 <input type="checkbox"/>    | 00 <input type="checkbox"/> | 01 <input type="checkbox"/>   | 02 <input type="checkbox"/> | 03 <input type="checkbox"/> | 04 <input type="checkbox"/> | 05 <input type="checkbox"/> |

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 <input type="checkbox"/>      | 2 <input type="checkbox"/>          | 3 <input type="checkbox"/> |
| Tax preparation software.....   | 1 <input type="checkbox"/>      | 2 <input type="checkbox"/>          | 3 <input type="checkbox"/> |
| Websites other than the IRS website.....  | 1 <input type="checkbox"/>      | 2 <input type="checkbox"/>          | 3 <input type="checkbox"/> |
| 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 <input type="checkbox"/>      | 2 <input type="checkbox"/>          | 3 <input type="checkbox"/> |
| Peers or colleagues.....  | 1 <input type="checkbox"/>      | 2 <input type="checkbox"/>          | 3 <input type="checkbox"/> |

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  |
| <input type="checkbox"/>          | <input type="checkbox"/>              | <input type="checkbox"/> |



P.O. Box 474 Toledo, OH 43654  
 Toll-Free Number: **1-800-537-4097**  
 Mon – Fri, 8:00 AM to 11:00 PM EST  
 Sat, 10:00 AM to 6:00 PM EST  
 Contact Us: <http://mysurvey.com/contactus.cfm>  
 Privacy: <http://mysurvey.com/privacy.cfm>

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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](http://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                           | 3                           | 4                           | Very Important              |
|---|-----------------------------|-----------------------------|-----------------------------|-----------------------------|-----------------------------|
| Easy to use website.....                      | 01 <input type="checkbox"/> | 02 <input type="checkbox"/> | 03 <input type="checkbox"/> | 04 <input type="checkbox"/> | 05 <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"/> | 05 <input type="checkbox"/> |
| Reduced e-filing fees.....                    | 01 <input type="checkbox"/> | 02 <input type="checkbox"/> | 03 <input type="checkbox"/> | 04 <input type="checkbox"/> | 05 <input type="checkbox"/> |
| Easy to understand forms.....                 | 01 <input type="checkbox"/> | 02 <input type="checkbox"/> | 03 <input type="checkbox"/> | 04 <input type="checkbox"/> | 05 <input type="checkbox"/> |
| More helpful phone staff.....                 | 01 <input type="checkbox"/> | 02 <input type="checkbox"/> | 03 <input type="checkbox"/> | 04 <input type="checkbox"/> | 05 <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"/> | 05 <input type="checkbox"/> |
| Quicker response times to questions . . .     | 01 <input type="checkbox"/> | 02 <input type="checkbox"/> | 03 <input type="checkbox"/> | 04 <input type="checkbox"/> | 05 <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"/> | 05 <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.