

**Prototype Customer Satisfaction Survey for External  
Customers of Media and Publications Division**

**2010 Individual Taxpayer Survey**

**DRAFT CATI version**

**Internal Revenue Service  
Tax Forms and Publications Division**

**November 17, 2009**

## SCREENER INTRODUCTION

///ASK ALL///

Hello, my name is [CALLER NAME] calling from ICF Macro on behalf of the Internal Revenue Service, or IRS.

///ASK ALL///

S1. We are an independent research organization working with the IRS to obtain feedback on customer satisfaction. I would like to speak with an adult in the household who deals with the household taxes.

- |  |  |
|--|--|
| 01 Person on the phone is the correct person                     | Continue                                   |
| 02 Person on the phone is not the correct person                 | [Ask to speak to the correct person]       |
| 03 No one available  | Thank and schedule callback                |
| 04 TERMINATE SCREEN  |  |
| 05 No. Do not have to file a Federal income tax return for 2009. | Thank and terminate call (036 disposition) |
| 06 No. Have not yet filed Federal income tax return for 2009.    | Thank and terminate call (037 disposition) |
| 97 DON'T KNOW  | Thank and terminate call                   |
| 99 REFUSED   | Thank and terminate call                   |

///ASK IF S1=01///

S2. [When the correct person is on the phone] We would like to invite you to take part in a brief voluntary survey about your satisfaction with some of the products and services the IRS offers for tax return preparation. The interview should take no more than 15 minutes for most customers. Your identity and individual responses will be held Anonymous by ICF Macro. We will not ask you for any personal financial information or about the details of your tax return itself. Any data provided to the IRS will be completely anonymous and all personally identifying information will be removed. Your participation is very important to help the IRS design products and services that meet the needs of taxpayers.

[INTERVIEWER NOTE – READ ONLY IF NECESSARY. If you would like to speak with someone at IRS to verify the study please contact Patty Wagner at [patty.wagner@irs.gov](mailto:patty.wagner@irs.gov) or (202) 283-0188.]

- |               |                          |
|---------------|--------------------------|
| 01 Continue   |                          |
| 02 NO         | Thank and terminate call |
| 97 DON'T KNOW | Thank and terminate call |
| 99 REFUSED    | Thank and terminate call |

## INDIVIDUAL TAXPAYER

**This call may be monitored for quality assurance purposes.**

In thinking of your experiences, concentrate on the products and services you use as an individual taxpayer only. Our first few questions are about how you file taxes.

///ASK IF S2=01///

Q1. Have you filed a FEDERAL INCOME TAX RETURN for 2009? [Read list]

- |   |                          |
|---|--------------------------|
| 01 Yes. You or your spouse have filed a Federal tax return for 2009 |                          |
| 02 No. Do not have to file a Federal income tax return for 2009.    | Thank and terminate call |
| 03 No. Have not yet filed Federal income tax return for 2009.       | Thank and terminate call |

97 DON'T KNOW  
99 REFUSED

Thank and terminate call  
Thank and terminate call

///ASK IF Q1=01///

Q2. Who prepared your 2009 Federal income tax return? [Read list]

01 You or another family member in your household  
02 A paid preparer, like an accountant or tax service, or a volunteer  
03 Someone else outside your household (SPECIFY)

Thank and terminate call  
Thank and terminate call

97 DON'T KNOW  
99 REFUSED

Thank and terminate call  
Thank and terminate call

///ASK IF Q2=01///

Q3. Would you say that you are the adult in your household who is most familiar with the preparation and filing of your federal income tax return for 2009? [Read list]

01 Yes, most familiar  
02 Equally familiar  
03 Neither "most familiar" nor "equally familiar"

Skip to 4A.

97 DON'T KNOW  
99 REFUSED

Thank and terminate call  
Thank and terminate call

///ASK IF Q3=01,02///

Q4. Are you familiar enough with your Federal income tax return for 2009 to answer some questions about it?

01 YES  
02 NO

Skip to Q5.  
Continue

97 DON'T KNOW  
99 REFUSED

Thank and terminate call  
Thank and terminate call

///ASK IF Q3=03 OR Q4=02 OR Q4C=03///

Q4A. May I speak with the person in your household who would be familiar enough with your 2009 Federal income tax return to answer some questions about it?

01 YES  
02 NO  
03 Person not available

Ask person's name and Skip to Q4C  
Thank and terminate call  
Ask person's name and continue to

97 DON'T KNOW  
99 REFUSED

Thank and terminate call  
Thank and terminate call

///ASK IF Q4A=03///

Q4B. What would be a good time to call back to speak with (name)?

01 [record name]

Record time and schedule recall

97 DON'T KNOW  
99 REFUSED

Thank and terminate call  
Thank and terminate call

///ASK IF Q4A=01///

Q4C. [When the correct person is on the phone] Hello, my name is [CALLER NAME] calling from ICF Macro on behalf of the Internal Revenue Service, or IRS. We are an independent research organization working with the IRS to obtain feedback on customer satisfaction. Would you say that you are the adult in your household who is most familiar with the preparation and filing of your Federal income tax return for 2009? [Read list]

- 01 Yes, most familiar
- 02 Equally familiar
- 03 Neither “most familiar” nor “equally familiar” Skip to Q4A

97 DON'T KNOW Thank and terminate call  
99 REFUSED Thank and terminate call

///ASK IF Q4C=01,02///

Q4D. Are you familiar enough with your Federal income tax return for 2009 to answer some questions about it?

- 01 YES Continue
- 02 NO Thank and terminate call

97 DON'T KNOW THANK AND TERMINATE CALL  
99 REFUSED THANK AND TERMINATE CALL

///ASK IF Q4D=01///

Q4E. We would like to invite you to take part in a brief voluntary survey about your satisfaction with some of the products and services the IRS offers for tax return preparation. The interview should take no more than 15 minutes for most customers. Your identity and individual responses will be held Anonymous by ICF Macro. We will not ask you for any personal financial information or about the details of your tax return itself. Any data provided to the IRS will be completely anonymous and all personally identifying information will be removed. Your participation is very important to help the IRS design products and services that meet the needs of taxpayers.

[INTERVIEWER NOTE – READ ONLY IF NECESSARY. If you would like to speak with someone at IRS to verify the study please contact Patty Wagner at [patty.wagner@irs.gov](mailto:patty.wagner@irs.gov) or (202) 283-0188.]

- 01 YES Skip to Q5.
- 02 NO Thank and terminate call

97 DON'T KNOW Thank and terminate call  
99 REFUSED Thank and terminate call

///ASK IF Q4=01 OR Q4E=01///

Q5. Which of the following Federal tax forms did you use when you filed your 2009 tax return? Was it... ?  
[Read list. Select one.]

- 01 1040EZ Income Tax Return for Single Filers and Joint Filers with No Dependents Skip to Q7
- 02 1040A US Individual Income Tax Return Skip to Q7
- 03 1040 US Individual Tax Return

97 DON'T KNOW Thank and terminate call  
99 REFUSED Thank and terminate call

///ASK IF Q5=03///

- Q6. Which of the following forms, if any, did you file with your Form 1040? [Read list. Select all that apply.]
- 01 Schedule A for itemized deductions
  - 02 Schedule B for interest and dividend income
  - 03 Schedule C for small business income
  - 04 Schedule D for capital gains and losses
  - 05 Schedule E for supplemental income
  - 06 Schedule F for farm income
  - 07 Other forms not listed
  - 08 No forms other than 1040
- 97 DON'T KNOW  
99 REFUSED

///ASK IF Q4=01 OR Q4E=01///

- Q7. How did you prepare your 2009 Federal income tax return? Was it ... ? [READ LIST. SELECT ONE.]
- 01 By hand, using the IRS tax form
  - 02 On the computer, using a computer program
- 97 DON'T KNOW  
99 REFUSED

///ASK IF Q4=01 OR Q4E=01///

- Q8. After your forms were completed, how did you file your most recent tax return? [READ LIST. SELECT ONE.]
- 01 I filed by regular mail
  - 02 I filed electronically by computer
  - 03 Delivered in person
- 97 DON'T KNOW  
99 REFUSED

## FORMS EVALUATION

///ASK IF Q4=01 OR Q4E=01///

- Q9. Now I'm going to ask you a few questions about your experiences with the most current tax forms and instructions for Tax Year 2009. Please rate your satisfaction with each of the following items on a scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied.
- A. Knowing where to find tax forms and instructions
  - B. The ease of determining which forms and instructions you needed
  - C. The ease of finding answers in the publications
  - D. Knowing what you needed to do to complete the forms
  - E. The completeness of instructions
  - F. The ease of understanding the instructions
  - G. The ease of getting tax forms and instructions
  - H. The ease of understanding tax forms
- 05 Very satisfied  
04 Satisfied  
03 Neither satisfied nor dissatisfied

02 Dissatisfied  
01 Very dissatisfied

96 [Not applicable/Have not used/No experience]  
97 DON'T KNOW  
99 REFUSED

**PUBLICATION EVALUATION**

Now I'm going to ask you a few questions about tax publications. Again, please think about your use of tax publications as an individual taxpayer for your 2009 Federal tax return.

///ASK IF Q4=01 OR Q4E=01///

Q10. Did you use any IRS publications in preparing your 2009 Federal tax return?

01 YES  
02 NO

Skip to Q22

97 DON'T KNOW  
99 REFUSED

Skip to Q22

///ASK IF Q10=01///

Q11. Which of the following IRS publications have you used in preparing your 2009 Federal tax return?

[CHOOSE ALL THAT APPLY. READ LIST]  
[ROTATE A-N]

- A. Pub 17 Your Federal Income Tax
- B. Pub 463 Travel, Entertainment, Gift and Car Expenses
- C. Pub 501 Exemptions, Standard Deductions and Filing Instructions
- D. Pub 502 Medical and Dental Expenses
- E. Pub 505 Tax Withholding and Estimated Tax
- F. Pub 523 Selling Your Home
- G. Pub 525 Taxable and Nontaxable Income
- H. Pub 535 Business Expenses
- I. Pub 550 Investment Income and Expenses
- J. Pub 590 Individual Retirement Arrangements (IRAs)
- K. Pub 596 Earned Income Credit
- L. Pub 946 How To Depreciate Property
- M. Pub 970 Tax Benefits for Education
- N. Other (SPECIFY)

01 Used publication  
02 Did not use

97 DON'T KNOW  
99 REFUSED

///ASK IF Q11N=01///

Q11NOTH \_\_\_\_\_

*///PROGRAMMER: FOR EACH OF THE FIRST TWO PUBLICATIONS FROM LIST IN Q11 WITH A 01 (USED PUBLICATION) RESPONSE, ASK QUESTIONS Q13 – Q20. CONTINUE WITH Q21 AFTER QUESTIONS ON SECOND PUBLICATION ARE COMPLETE.///*

*///PROGRAMMER: IF ONLY ONE PUBLICATION RECEIVES A 01 RESPONSE, SKIP TO Q21 AFTER THE QUESTIONS ABOUT THE FIRST PUBLICATION WITH A 01 RESPONSE.///*

*///If ALL Q11A-N=02 SKIP TO Q21///*

*///PROGRAMMER: FOR QUESTIONS Q13-Q20. "SELFORM1" IS ASSIGNED LETTER (A-N) OF THE PUB THAT WAS ACKNOWLEDGED FIRST, IF 1 OR MORE WAS ACKNOWLEDGED "SELFORM2" IS ASSIGNED LETTER (A-N) OF THE PUB THAT WAS ACKNOWLEDGED SECOND, IF 2 OR MORE WERE ACKNOWLEDGED/// THESE TWO DELIVERABLES WILL BE DELIVERED IN FINAL DATA SET.*

*///ASK Q13 (X) IF SELFORM1=X OR SELFORM2=X///*

Q13 (a-n). Now I'll ask some questions about a couple of the publications that you used in filing your 2009 income tax return

*///ASK IF ANY Q11A-Q11N=01///How did you find out about (**Insert Publication** from Q11)? [READ LIST. SELECT ALL THAT APPLY.]*

- 01 Form 1040 or other schedules referred me to it
- 02 List of publications on IRS website
- 03 From doing taxes in previous years
- 04 From other tax guides
- 05 From my tax preparer
- 06 Word of mouth

97 DON'T KNOW

99 REFUSED

Q13oth(a-n) 95 Other (SPECIFY)\_\_\_\_\_

*///ASK Q13 (X) IF SELFORM1=X OR SELFORM2=X///*

Q14 (a-n). On a scale from 1 to 5, with 1 being very difficult and 5 being very easy, how easy was it for you to obtain (**Insert Publication from Q11**)?

- 05 Very easy Skip to Q16
- 04 Easy Skip to Q16
- 03 Neither easy nor difficult Skip to Q16
- 02 Difficult Go to PREQ15
- 01 Very difficult Go to RREQ15

96 [Not applicable/Have not used/No experience] Skip to Q16

97 DON'T KNOW Skip to Q16

99 REFUSED Skip to Q16

*///ASK IF Q14 (x)=02 OR 01///*

PREQ15 (a-n). What was difficult about obtaining this document?

01 GAVE ANSWER

97 DON'T KNOW

99 REFUSED

///ASK IF PREQ(x)15=01///

Q15 (a-n). What was difficult about obtaining this document?

[INTERVIEWER: ENTER RESPONSE \_\_\_\_\_]

///ASK Q13 (X) IF SELFORM1=X OR SELFORM2=X///

Q16 (a-n). On a scale of 1 to 5 with 1 being very poor and 5 being very good, how would you rate the following aspects of **(Insert Publication from Q11)** document?

- A. Table of contents
- B. Important changes
- C. Index
- D. Worksheet
- E. Examples
- F. Flow charts
- G. Appendix
- H. Tax tables

05                      Very Good

04

03

02

01                      Very Poor

96                      [Not applicable/Have not used/No experience]

97                      DON'T KNOW

99                      REFUSED

///ASK Q13 (X) IF SELFORM1=X OR SELFORM2=X///

Q17 (a-n) .In thinking about your experience with the most recent version of **(Insert Publication from Q11)**, tell me whether you agree or disagree with the following statements on a scale of 1 to 5, where 1 is strongly disagree and 5 is strongly agree.

- A. The language was understandable
- B. The graphics and layout made it easy to follow
- C. The size of the print made it easy to read
- D. It was easy to find the information that I was looking for
- E. It was easy to go back and forth between the publication and the form
- F. The section headings were useful
- G. The publication was as clear as possible, given the tax law
- H. I feel confident in the calculations that I made

05                      Strongly Agree

04

03

02

01                      Strongly Disagree

96                      [Not applicable/Have not used/No experience]

97                      DON'T KNOW



///ASK Q13 (X) IF SELFORM1=X OR SELFORM2=X///

Q18 (a-n). Taking all of these factors into account, on a scale of 1 to 5 where 1 means very dissatisfied and 5 means very satisfied, how would you rate your overall satisfaction with **(Insert Publication from Q11)** the last time you used it?

- 05 Very satisfied
- 04 Satisfied
- 03 Neither satisfied nor dissatisfied (Return to Q13 if appropriate; otherwise skip to Q21)
- 02 Dissatisfied Skip to Q20
- 01 Very dissatisfied Skip to Q20
  
- 96 [Not applicable/Have not used/ No experience] (Return to Q13 if appropriate; otherwise skip to Q21)
- 97 DON'T KNOW (Return to Q13 if appropriate; otherwise skip to Q21)
- 99 REFUSED (Return to Q13 if appropriate; otherwise skip to Q21)

///ASK IF Q18 (x)=05, 04///

PREQ19 (a-n). What would you describe as the BEST features of this publication? [PROBE: Anything else? ]

- 01 GAVE RESPONSE
- 97 DON'T KNOW
- 99 REFUSED

///Return to Q13 if appropriate; otherwise SKIP TO Q21///

///ASK IF PREQ19(x)=01///

Q19 (a-n). What would you describe as the BEST features of this publication? [PROBE: Anything Else?]

[INTERVIEWER: ENTER RESPONSE\_\_\_\_\_]

///Return to Q13 if appropriate; otherwise SKIP TO Q21///

///ASK IF Q18(x)=01,02///

PREQ20 (a-n). How could this publication be improved? [PROBE: Anything Else? ]

- 01 GAVE RESPONSE
- 97 DON'T KNOW
- 99 REFUSED

///Return to Q13 if appropriate; otherwise continue to Q21///

///ASK IF PREQ20(x)=01///

Q20 (a-n). How could this publication be improved? [PROBE: Anything Else?]

INTERVIEWER: ENTER RESPONSE\_\_\_\_\_

///Return to Q13 if appropriate; otherwise continue to Q21///

///ASK IF Q10=01 OR ANY Q11A-N=01///

Q21. Where did you get the publications you used for your 2009 Federal income tax return? If you obtained publications from different sources, please tell us all the sources.

[Interviewer: Use list as prompt if interviewee is unsure of possible sources. Allow multiple responses].

///MUL 12///

[INTERVIEWER: RECORD RESPONSE \_\_\_\_\_]

- 01 IRS office
- 02 IRS website
- 03 VITA or TCE site
- 04 By calling the IRS to send it to me
- 05 By e-mailing request to IRS
- 06 Tax preparer/accountant
- 07 Through the mail
- 08 Tax preparation software or computer program
- 09 Library
- 10 Post office
- 11 Other government office
- 95 OTHER (SPECIFY)

97 DON'T KNOW

99 REFUSED

Q21oth Other (SPECIFY) \_\_\_\_\_

### WEBSITE AND ELECTRONIC FORMS EVALUATION

Now I'm going to ask you some questions about the IRS website.

///ASK IF Q4=01 OR Q4E=01///

Q22. Are you aware that the IRS has a website where you can obtain forms and publications?

01 YES

02 NO Skip to Q33

97 DON'T KNOW

99 REFUSED

///ASK IF Q22=01///

Q23. Have you ever obtained tax forms or publications from [www.irs.gov](http://www.irs.gov)?

01 YES

02 NO Skip to Q33

97 DON'T KNOW SKIP TO Q33

99 REFUSED SKIP TO Q33

///ASK IF Q23=01///

Q24. Approximately how many times did you access the IRS website to get forms, instructions or publications during the most recent tax season? Your best estimate is fine.///RANGE=0-94, 94=94 or more/// ///INTERVIEWER: PROBE FOR TIMES///

\_\_\_\_\_ TIMES ///RANGE=0-94, 94=94 or more///

97 DON'T KNOW

99 REFUSED

///ASK IF Q23=01///

Q25. Did you use the IRS website in the past year for any of the following reasons?

- A. View a specific form
- B. Download a specific form
- C. View a specific publication
- D. Download a specific publication
- E. Get an answer to a tax question
- F. See what changes had been made in tax laws
- G. Find out how to get help with your taxes
- H. OTHER

01 YES

02 NO

97 DON'T KNOW

99 REFUSED

Q25HOTH Other (SPECIFY)\_\_\_\_\_

///IF Q24=1-94 AND ANY Q25A-H=01///

Q32. Taking all of these factors into account, on a scale of 1 to 5 where 1 means very dissatisfied and 5 means very satisfied, how would you rate your overall satisfaction with getting tax forms, publications and instructions from the IRS website?

05 Very satisfied

04 Satisfied

03 Neither satisfied nor dissatisfied

02 Dissatisfied

01 Very dissatisfied

96 [Not applicable/Have not used/No experience]

97 DON'T KNOW

99 REFUSED

## ELECTRONIC DOCUMENTS

///ASK IF Q4=01 OR Q4E=01///

Q33. Have you ever completed or used the electronic version of any Federal tax form on the IRS website?

01 YES

02 NO

Skip to Q35

97 DON'T KNOW Skip to Q35  
99 REFUSED Skip to Q35

///ASK IF Q33=01///

PREQ34. Please tell me the electronic tax form you have completed or used.

01 GAVE RESPONSE  
97 DON'T KNOW  
99 REFUSED

///ASK IF PREQ34=01///

Q34. Please tell me the electronic tax form you have completed or used.

[INTERVIEWER: ENTER RESPONSE\_\_\_\_\_]

///ASK IF Q4=01 OR Q4E=01///

Q35. Have you ever used the electronic version of any Federal tax publication on the IRS website?

01 YES  
02 NO Skip to Q40

97 DON'T KNOW Skip to Q40  
99 REFUSED Skip to Q40

///ASK IF Q35=01///

PREQ36. Please tell me the electronic publications you have used.

01 GAVE RESPONSE  
97 DON'T KNOW  
99 REFUSED

///ASK IF PREQ36=01///

Q36. Please tell me the electronic publications you have used.

[INTERVIEWER: ENTER RESPONSE\_\_\_\_\_]

///ASK IF Q35=01///

Q37. When you used the electronic publication on-line at the IRS website, which of the following did you use? [READ LIST.]

- A. Table of contents
- B. Important changes
- C. Index at back
- D. Worksheet
- E. Tips
- F. Examples
- G. Flow charts
- H. Appendix
- I. Tax tables

- J. Tax form
- K. Instructions for a tax form

- 01 Used
- 02 Did not use
- 97 DON'T KNOW
- 99 REFUSED

///ASK IF Q35=01///

PREQ38. What would you describe as the BEST features of the electronic publication?  
[PROBE: Anything else?] [INTERVIEWER: Ask for name of the form(s)/publication(s)]

- 01 GAVE RESPONSE
- 97 DON'T KNOW
- 99 REFUSED

///ASK IF PREQ38=01///

Q38. What would you describe as the BEST features of the electronic publication?  
[PROBE: Anything else?] [INTERVIEWER: Ask for name of the form(s)/publication(s)]

[INTERVIEWER: INTER RESPONSE\_\_\_\_\_]

///ASK IF Q35=01///

PREQ39. How could the electronic publication be improved? [PROBE: Anything else?] [INTERVIEWER: Ask for name of the form(s)/publication(s)]

- 01 GAVE RESPONSE
- 97 DON'T KNOW
- 99 REFUSED

///ASK IF PREQ39=01///

Q39. How could the electronic publication be improved? [PROBE: Anything else?] [INTERVIEWER: Ask for name of the form(s)/publication(s)]

[INTERVIEWER: ENTER RESPONSE\_\_\_\_\_]

///ASK IF Q35=01///

Q39A. Are you aware that several IRS electronic tax publications, for example Publication 17, now contain a linking feature? That is, they have active hyperlinks within the electronic version of the publication that allow the user to directly connect to a different section within the publication or to an external web page.

- 01 YES Continue
- 02 NO Skip to Question 40
  
- 97 DON'T KNOW Skip to Q40
- 99 REFUSED Skip to Q40

///ASK IF Q39A=01///

Q39B. Have you used the linking feature in any electronic tax publications?

- 01 YES Continue
- 02 NO Skip to Question 40

- 97 DON'T KNOW Skip to Q40
- 99 REFUSED Skip to Q40

///ASK IF Q39B=01///

PREQ39C. If yes, please list the electronic tax publications in which you have used the linking feature.

[INTERVIEWER: Ask for name of the form(s)/publication(s)]

- 01 GAVE ANSWER
- 97 DON'T KNOW
- 99 REFUSED

///ASK IF PREQ39C=01///

Q39C. If yes, please list the electronic tax publications in which you have used the linking feature.

[INTERVIEWER: Ask for name of the form(s)/publication(s)]

[INTERVIEWER: ENTER RESPONSE\_\_\_\_\_]

///ASK IF Q39B=01///

Q39D. Has the linking feature in tax publications been beneficial for you?

- 01 YES Skip to Question 39F.
- 02 NO Continue

- 97 DON'T KNOW
- 99 REFUSED

///ASK IF Q39D=02///

PREQ39E. What makes the linking feature not beneficial for you?

- 01 GAVE RESPONSE
- 97 DON'T KNOW (Skip to Question 39G.)
- 99 REFUSED (Skip to Question 39G.)

///ASK IF PREQ39E=01///

Q39E. What makes the linking feature not beneficial for you? (Skip to Question 39G.)

[INTERVIEWER: ENTER RESPONSE\_\_\_\_\_]

///ASK IF Q39D=01///

PREQ39F. What are some of the benefits of the linking feature in tax publications?

- 01 GAVE RESPONSE
- 97 DON'T KNOW
- 99 REFUSED

///ASK IF PREQ39F=01///

Q39F. What are some of the benefits of the linking feature in tax publications?

[INTERVIEWER: ENTER RESPONSE\_\_\_\_\_]

///ASK IF Q39D=02///

PREQ39G. How can we improve the linking feature in tax publications?

- 01 GAVE RESPONSE
- 97 DON'T KNOW
- 99 REFUSED

///ASK IF PREQ39=01///

Q39G. How can we improve the linking feature in tax publications?

[INTERVIEWER: ENTER RESPONSE\_\_\_\_\_]

///ASK IF Q39B=01///

PREQ39H. In which additional tax publications would you like to see the linking feature added?

- 01 GAVE RESPONSE
- 97 DON'T KNOW
- 99 REFUSED

//ASK IF PREQ39H=01///

Q39H. In which additional tax publications would you like to see the linking feature added?

[INTERVIEWER: ENTER RESPONSE\_\_\_\_\_]

## MARKETING

///ASK IF Q4=01 OR Q4E=01///

Q40. On a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied, how satisfied are you that you know about changes which have occurred in tax forms that you needed to use for the 2009 tax filing season?

- 05 Very satisfied
- 04 Satisfied
- 03 Neither satisfied nor dissatisfied
- 02 Dissatisfied
- 01 Very dissatisfied

- 96 [Not applicable/Have not used/No experience]
- 97 DON'T KNOW
- 99 REFUSED

///ASK IF Q4=01 OR Q4E=01///

Q41. On a scale of 1 to 5, how satisfied are you that you know about changes which have occurred in publications that you needed to use for the 2009 Tax Year?

- 05 Very satisfied
- 04 Satisfied

- 03 Neither satisfied nor dissatisfied
- 02 Dissatisfied
- 01 Very dissatisfied

- 96 [Not applicable/Have not used/No experience]
- 97 DON'T KNOW
- 99 REFUSED

///ASK IF Q4=01 OR Q4E=01///

Q42. On a scale of 1 to 5, how satisfied are you with getting information on tax law changes for the 2009 Tax Year?

- 05 Very satisfied
- 04 Satisfied
- 03 Neither satisfied nor dissatisfied
- 02 Dissatisfied
- 01 Very dissatisfied

- 96 [Not applicable/Have not used/No experience]
- 97 DON'T KNOW
- 99 REFUSED

///ASK IF Q4=01 OR Q4E=01///

Q43. How do you find out when tax forms and publications have changed? [DO NOT READ. SELECT ALL THAT APPLY.]

- 01 IRS website
- 02 IRS workshop
- 03 Professional association
- 04 Word of mouth
- 05 Software programs
- 06 TV, radio, or print advertisements
- 07 Tax Preparer
  
- 97 DON'T KNOW
- 99 REFUSED

Q43oth 95 Other (SPECIFY)\_\_\_\_\_

///ASK IF Q4=01 OR Q4E=01///

Q44. On a scale of 1 to 5, where 1 is very dissatisfied and 5 is very satisfied, how satisfied are you with the way the IRS communicates changes in services to its customers?

- 05 Very satisfied
- 04 Satisfied
- 03 Neither satisfied nor dissatisfied
- 02 Dissatisfied
- 01 Very dissatisfied

- 96 [Not applicable/Have not used/No experience]



97 DON'T KNOW  
99 REFUSED

**OVERALL RATING**

///ASK IF Q4=01 OR Q4E=01///

Q45A. On a scale of 1 to 5, overall how would you rate the IRS on forms, instructions, publications and other tax products that it develops, produces and distributes to taxpayers?

- 05 Very satisfied
- 04 Satisfied
- 03 Neither satisfied nor dissatisfied
- 02 Dissatisfied
- 01 Very dissatisfied

96 [Not applicable/Have not used/No experience]

97 DON'T KNOW  
99 REFUSED

**NOTICE IMPROVEMENT SURVEY QUESTIONS**

///ASK IF Q4=01 OR Q4E=01///

Q46. In the past 12 months, have you received a notice from the IRS?

- 01 YES
- 02 NO Skip to Q55
  
- 97 DON'T KNOW Skip to Q55
- 99 REFUSED Skip to Q55

///ASK IF Q48=01///

Q47. Please indicate the general topic of the notice you received:

- 01 Balance Due – IRS said I owed money
- 02 Getting a Refund – IRS said they owed me money
- 03 Education – tell me I might be able to claim something I did not
- 04 Error on tax return – IRS changed by tax return
- 05. Don't remember
- 06 Don't know (the notice wasn't clear)
- 07 Other \_\_\_\_\_

**NOTICE RESOLUTION**

Q50. Who "handled" the notice?

- 01 I or my spouse handled the notice (Go To NR1a)
- 02 Had someone else handle it (i.e., Tax preparer, accountant)
- 03 Did nothing regarding the notice (Go To NR1b)
- 04 Don't remember
- 05 Other \_\_\_\_\_

Q51. How did you choose to handle the notice?

- 01 Called the IRS Toll-free number
- 02 Visited the local IRS office
- 03 Sent regular mail to the IRS
- 04 Sent email to the IRS
- 05 Other \_\_\_\_\_
- 06 Did nothing
- 07 Don't remember
- 08 Not applicable

Q52. What was the primary reason that you did nothing about the notice?

- 01 It wasn't clear what I was supposed to do
- 02 The notice said no action was needed
- 03 The issue was already resolved
- 04 Other (specify)\_\_\_\_\_

Q53. Recalling your experience with the notice, please indicate the level to which you agree or disagree with the following statements. Please rate your satisfaction with each of the following items on a scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied

- A The language was easy to understand
- B The layout was easy to follow
- C The section headings (if any) were helpful
- D The notice contained too much information
- E The notice contained all the information I needed
- F The notice was clear on what action I needed to take
- G The contact information was easy to locate
- H Other, (please indicate what you didn't like about the notice) \_\_\_\_\_

- 05 Strongly Agree
- 04 Agree
- 03 Neither Agree or Disagree
- 02 Disagree
- 01 Strongly Disagree

97 DON'T KNOW  
99 REFUSED

## DEMOGRAPHICS

I have just a few more final questions.

///ASK IF Q4=01 OR Q4E=01///

Q54. What is your age?

///RANGE=18-94, 94=94 or older///

\_\_\_\_\_Age ///RANGE=18-94, 94=94 or older///

97 DON'T KNOW  
99 REFUSE

///ASK IF Q4=01 OR Q4E=01///

Q55. Is your gender.....  
01 Male  
02 Female

97 DON'T KNOW  
99 REFUSED

///ASK IF Q4=01 OR Q4E=01///

Q56. What is the highest level of education you have completed? [READ LIST] (Stop when the highest level is reached).

- 01 Less than 9th grade
- 02 9th grade to 12th grade, no diploma
- 03 High school graduate (or GED)
- 04 Some technical or vocational school
- 05 Technical or vocational school graduate
- 06 Some college, no degree
- 07 Associate Degree
- 08 Bachelor's Degree
- 09 Master's Degree
- 10 Post-Master's Degree

97 DON'T KNOW  
99 REFUSED

///ASK IF Q4=01 OR Q4E=01///

Q57. Where do you access the Internet? (choose all that apply) ///MUL=03///  
01 Home  
02 Work  
03 Public library or other place  
05 I do not access the Internet

97 DON'T KNOW  
99 REFUSED

///ASK IF Q4=01 OR Q4E=01///

Q58. Do you have any of the following long-term conditions lasting 6 months or more)? [READ LIST] (Select all that apply) ///MUL=08///  
01 Blindness  
02 Deafness  
03 Severe Vision Impairment  
04 Severe Hearing Impairment  
05 Severe Speech Impairment

- 06 A condition that substantially limits my physical abilities (such as standing or walking)
- 07 A condition that limits learning or remembering
- 96 I do not have a long-term condition

97 DON'T KNOW  
99 REFUSE

95 Other (SPECIFY)\_\_\_\_\_

///ASK IF Q4=01 OR Q4E=01///

Q59. Was your annual household income for 2009? Please stop when I get to the correct category. [READ LIST]

- 01 Less than \$10,000
- 02 \$10,000 but less than \$15,000
- 03 \$15,000 but less than \$25,000
- 04 \$25,000 but less than \$35,000
- 05 \$35,000 but less than \$50,000
- 06 \$50,000 but less than \$75,000
- 07 \$75,000 but less than \$100,000
- 08 \$100,000 but less than \$150,000
- 09 \$150,000 but less than \$200,000
- 10 \$200,000 but less than \$1,000,000
- 11 \$1,000,000 or more

97 DON'T KNOW  
99 REFUSED

**CLOSE**

///ASK IF Q4=01 OR Q4E=01///

CLOSE1 That concludes this survey. The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests along with the address where you can send comments regarding the study. The OMB number for this study is **1545-1349**. Would you like the address where you can send comments?

- 01 YES
- 02 NO Skip to Close3
- 97 DON'T KNOW Skip to Close3
- 99 REFUSED Skip to Close3

///ASK IF CLOSE1=01///

CLOSE2 If you have any comments regarding this study, please write to: IRS, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, Room 6526, 1111 Constitution Avenue, NW, Washington, DC 20224.

///ASK IF Q4=01 OR Q4E=01///

CLOSE3. On behalf of the IRS and ICF Macro Inc., thank you very much for your participation. Your responses will be very helpful for the IRS in better serving taxpayers' needs in the future.

**Prototype Customer Satisfaction Survey for External  
Customers of Media and Publications Division:**

**2010 Business Taxpayer Survey**

**FINAL Web version**

**Internal Revenue Service  
Tax Forms and Publications Division**

**March 26, 2010**

///PROGRAMMER: IF RESPONDENT SKIPS QUESTION, CODE RESPONSE AS 88///

///PROGRAMMER: NEVER DISPLAY THE RESPONSE CODES, NEVER DISPLAY THE CODE N/A VALUE (96)///

///PROGRAMMER: IF TEXT ON THIS DOCUMENT IS BOLDED, IT SHOULD BE BOLDED ON THE WEB SCREEN AS WELL///

///PROGRAMMER: PLEASE INDICATE A “STOP” BUTTON TO ENABLE SUSPENDING AND IMMEDIATE RESUMING///

///PROGRAMMER: PLEASE INCLUDE A PREVIOUS AND NEXT BUTTON ON EACH PAGE///

///PROGRAMMER: PLEASE POST “FOR TECHNICAL ASSISTANCE, PLEASE CONTACT OUR HELP DESK VIA E-MAIL AT [IRS.WI.MP@MMAIL.MACROINTERNATIONAL.COM](mailto:IRS.WI.MP@MMAIL.MACROINTERNATIONAL.COM) OR CALL 866-287-5762.” AT THE BOTTOM OF EACH SCREEN///

**///ASK ALL///**

### **Web Introduction**

Welcome to the IRS Media and Publications Division customer satisfaction survey. ICF Macro Inc., an independent research organization, is working with the IRS to obtain your feedback as a business taxpayer about forms, publications, and services that are used to assist customers in understanding, preparing, and filing federal income tax returns.

This survey should take no longer than 20 minutes. You will be able to suspend the survey at any time and re-enter the survey where you left off without losing any of your responses.

If you wish to verify the IRS’s sponsorship of the survey, please click on this link to the IRS website.  
<http://www.irs.gov/formspubs/article/0,,id=109875,00.html>.

Thank you in advance for your participation in this important survey.

**//ASK ALL//**

### **Anonymity and Security**

ICF Macro will hold your identity Anonymous and will provide results to IRS in aggregate. Macro will provide IRS with the raw data with all personally identifying information removed. In addition, the survey is hosted on a secure server. Please feel confident that your answers will be used solely for the purpose stated above.

**///ASK ALL///**

### **Instructions**

Moving forward: Click on the NEXT button to save your responses and continue to the next page.

Moving back: Click on the PREVIOUS button to view your responses on a previous

Suspending and re-entering:

page. You may change your answers to previously entered responses. You may suspend the survey at any time by clicking STOP. You may re-enter the survey where you left off by entering the URL provided in your invitation letter and re-entering your password. If you close your browser without clicking STOP, the survey will automatically halt and you will need to wait 10 minutes to re-access the survey.

For technical assistance, please contact our help desk via e-mail at [IRS.WI.MP@mmail.macrointernational.com](mailto:IRS.WI.MP@mmail.macrointernational.com) or call 866-287-5762.

*Paperwork Reduction Act Notice*

*The Paperwork Reduction Act requires that the IRS display OMB control number on all public information requests. The OMB Control Number for this study is 1545-1349. If you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to: Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, room 6526, 1111 Constitution Ave. NW, Washington, DC 20224.*

*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.*

///ASK ALL///

Q1. Did your business file a 2009 federal income tax return?

01 Yes

[Skip to Q2]

02 No

[Continue to Q1a]

97 Not Sure

[Continue to Q1a]

///ASK IF Q1=02 OR 97///

Q1a. Thank you. This completes the survey. We appreciate your participation.

///ASK IF Q1=01/// ///RANGE 1-199///

Q2. How many years have you been in business? \_\_\_\_\_ ///RANGE 1-199///

///ASK IF Q1=01///

Q3. Which tax form did you file for your 2009 federal income tax return? *Please mark all that apply.* ///MUL=06///

01 1120 or 1120A for a Corporation

02 1120S for an S Corp

03 1065 for a Partnership

04 1040 Schedule C for an Individual

05 1040 Schedule E for an Individual

95 Other (*Please specify*) \_\_\_\_\_

97 Not sure

///ASK IF Q1=01///

Q4. Who prepared your business's 2009 Federal tax return? Please select one.

01 You or someone else in your business

02 Professional tax preparer (includes Accountant, CPA, Enrolled Agent or other tax preparers)

95 Someone else (*Please specify*) \_\_\_\_\_

97 Not sure

///ASK IF Q1=01///

Q5. How did you or your preparer prepare your business income tax return?

01 Prepared return using paper and pencil

02 Filed electronically by computer (e-file)

97 Not sure

///ASK IF Q1=01///

Q6. How did you or your preparer file your business income tax return?

Filed print tax return by regular mail

Filed electronically by computer (e-file)

97 Not sure

///ASK IF Q1=01///



Q7. Did your business pay estimated taxes in 2009?

01 Yes

[Continue to Q8]

02 No

[Skip to Q9]

97 Not sure

[Skip to Q9]

///ASK IF Q7=01///

Q8. How did you determine your estimated tax payments in 2009? Did you try to accurately estimate the amount of your required payment or base it on your prior tax years?

01 Tried to accurately estimate the required payment based on this year's data

02 Based it on estimated payments made in prior tax years

97 Not sure

## TAX FORMS, INSTRUCTIONS AND PUBLICATIONS

///ASK IF Q1=01///

Q9. Did you receive ANY tax forms, instructions, or publications for your 2009 Federal tax returns from the following sources? *Please mark all that apply.*///MUL=08///

01 IRS office

02 IRS website

03 Other Website

04 Tax preparation software or computer program

05 Accountant or tax preparer

06 Library

07 Post office

08 None of these

95 Other (*Please specify*) \_\_\_\_\_

///ASK IF Q1=01///

Q10. Did you use the electronic version of any *Federal tax form* on the IRS website during the 2009 tax season?

01 Yes

02 No

[Skip to Q12]

///ASK IF Q10=01///

Q11. If yes, which electronic tax form(s) did you use?

\_\_\_\_\_

///ASK IF Q1=01///

Q12. In thinking about the 2009 tax forms, instructions and publications you used, please rate your satisfaction with each of the following items:

		Very	Satisfied	Somewha	Dissatisfi	Very
--	--	------	-----------	---------	------------	------

		Satisfied 05	04	Not Satisfied 03	02	Dissatisfied 01
Q12A	Knowing where to find tax forms and instructions	0	0	0	0	0
Q12B	The ease of determining which forms and Instructions you needed	0	0	0	0	0
Q12C	The ease of understanding the forms	0	0	0	0	0
Q12D	The ease of understanding the instructions for the form	0	0	0	0	0
Q12E	The ease of finding answers in the publications	0	0	0	0	0

## PUBLICATIONS

//ASK IF Q1=01//

///PROGRAMMER: [IF Q13 = "DID NOT USE" FOR ALL SELECTIONS Q13A-Q13 G, SKIP TO Q19. IF NO RESPONSE IS GIVEN FOR ANY SELECTION, TREAT IT AS A "DO NOT USE."///

Q13. Please indicate if you have used any of these publications in printed format or in electronic format from the IRS website. If you have not used a publication in the past 12 months, please check "Did Not Use".

		Used Printed Publication 01	Used Electronic Publication 02	Did Not Use 03
Q13A	Pub 334 Tax Guide for Small Business	0	0	0
Q13B	Pub 535 Business Expenses	0	0	0
Q13C	Pub 505 Tax Withholding and Estimated Tax	0	0	0
Q13D	Pub 15 Circular E, Employer's Tax Guide	0	0	0
Q13E	Pub 15a Employer's Supplemental Tax Guide	0	0	0
Q13F	Pub 15b Employer's Guide to Fringe Benefits	0	0	0
Q13G	Other #1 (Please specify) _____	0	0	0

///ASK IF Q1=01 AND IF AT LEAST 2 SELECTIONS Q13=01, 02///

Q14. We would like to know which publications you used most often in the last 12 months. Of the publications below, *check the three you used most often*. Next, check the one that you used most often, 2<sup>nd</sup> most often, and 3<sup>rd</sup> most often. Please check only one choice in each column. If you used less than three publications, please check only as many columns as you actually used.

///PROGRAMMER: LIST ONLY SELECTIONS CHECKED “USED PRINTED PUBLICATION” OR “USED ELECTRONIC PUBLICATION” IN Q13///

///PROGRAMMER: IF ONLY ONE CHOICE SELECTED FOR “USED PRINTED PUBLICATION” OR “USED ELECTRONIC PUBLICATION” IN Q13, SKIP TO Q15///

///PROGRAMMER: IF TWO CHOICES SELECTED FOR “USED PRINTED PUBLICATION” OR “USED ELECTRONIC PUBLICATION” IN Q13, SHOW ONLY FIRST TWO COLUMNS: “USED MOST OFTEN” AND “USED 2<sup>ND</sup> MOST OFTEN”///

///PROGRAMMER: DO NOT ALLOW RESPONDENT TO CHECK MORE THAN ONE ITEM IN EACH COLUMN///

		Used Most Often 01	Used 2 <sup>nd</sup> Most Often 02	Used 3rd Most Often 03
Q14A	Pub 334 Tax Guide for Small Business	0	0	0
Q14B	Pub 535 Business Expenses	0	0	0
Q14C	Pub 505 Tax Withholding and Estimated Tax	0	0	0
Q14D	Pub 15 Circular E, Employer’s Tax Guide	0	0	0
Q14E	Pub 15a Employer’s Supplemental Tax Guide	0	0	0
Q14F	Pub 15b Employer’s Guide to Fringe Benefits	0	0	0
Q14G	Other #1 (Please specify) _____	0	0	0

///ASK IF Q1=01 AND IF ANY Q13=01,02///

Q15. How did you find out about the publication(s) you used most often? For each of your choices please check all the ways you found out about that publication. *Please check all that apply.*

///PROGRAMMER:FOR COLUMN HEADER “USED MOST OFTEN”, INSERT NUMBER OF PUBLICATION FROM Q14 WHICH WAS CHECKED “USED MOST OFTEN”, E.G., “PUB 553” OR “PUB 15A”. IF ONLY ONE CHOICE SELECTED FOR “USED PRINTED PUBLICATION” OR “USED ELECTRONIC PUBLICATION” IN Q13, SHOW ONLY FIRST COLUMN, “USED MOST OFTEN”///

- 
- ///PROGRAMMER: FOR COLUMN HEADER “USED 2<sup>ND</sup> MOST OFTEN”, INSERT NUMBER OF PUBLICATION FROM Q14 WHICH WAS CHECKED “USED 2<sup>ND</sup> MOST OFTEN”, E.G., “PUB 553” OR “PUB 15A”. IF ONLY TWO CHOICES SELECTED FOR “USED PRINTED PUBLICATION” OR “USED ELECTRONIC PUBLICATION IN Q13, SHOW ONLY FIRST TWO COLUMNS: “USED MOST OFTEN” AND “USED 2<sup>ND</sup> MOST OFTEN”///

///PROGRAMMER: FOR COLUMN HEADER "USED 3<sup>RD</sup> MOST OFTEN", INSERT NUMBER OF PUBLICATION FROM Q14 WHICH WAS CHECKED "USED 3<sup>RD</sup> MOST OFTEN", E.G., "PUB 553" OR "PUB 15A".///

		Pub Number Used Most Often 01	Pub Number Used 2 <sup>nd</sup> Most Often 02	Pub Number Used 3 <sup>rd</sup> Most Often 03
Q15A	Tax form instructions referred me to it	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Q15B	List of publications in instructions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Q15C	IRS website	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Q15D.	From doing taxes in previous years	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Q15E	IRS mailed it to me	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Q15F	From my tax preparer	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Q15G.	Word of mouth	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Q15H.	Financial magazines or services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Q15I.	Advertisements on radio or television	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Q15J.	Other <i>(Please specify)</i> _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

///ASK IF Q1=01 AND IF ANY Q13=01,02///

Q16. For the publication you used MOST OFTEN, [ INSERT PUBLICATION FROM Q14 USED MOST OFTEN] , how would you rate each of the following aspects?

		Very Good 05	04	03	02	Very Poor 01	Did not use N/A 96
Q16A	Table of contents	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Q16B	Important changes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Q16C	Index at back	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Q16D.	Worksheet	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Q16E	Examples	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Q16F	Flow charts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Q16G.	Appendix	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Q16H.	Tax tables	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Q16I.	Tips	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

///ASK IF Q1=01 AND IF ANY Q13=01,02///

Q17. In thinking about your experience with the publication [INSERT PUBLICATION FROM Q14 USED MOST OFTEN] you used MOST OFTEN, to what extent do you agree or disagree with the following statements.

		Strongly Agree 05	04	03	02	Strongly Disagree 01	Did not use 96
7A	The language was understandable.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7B	The graphics and layout made it easy to follow.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7C	The size of the print made it easy to read.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7D	It was easy to find the information that I was looking for.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7E	It was easy to go back and forth between the publication and the form.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7F	The section headings were useful.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7G	The publication was as clear as possible, given the tax law.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7H	I feel confident in the calculations that I made.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

///ASK IF Q1=01 AND IF ANY Q13=01,02///

Q18. How could this publication [INSERT PUBLICATION FROM Q14 USED MOST OFTEN] be improved?

---



---



---

## IRS WEBSITE

///ASK IF Q1=01///

Q19 Are you aware that the IRS has a website where you can obtain forms and publications?

- 01 Yes
- 02 No

[Skip to Q23]

//ASK IF Q19=01///

Q20. Approximately how many times did you access the IRS website during the 2009 tax season? *(Please estimate)* ///RANGE 0-999///

\_\_\_\_\_ times ///RANGE 0-999///

///ASK IF Q19=01///

Q21. Did you use the IRS website in the past year for any of the following reasons? *Please mark all that apply.* ///MUL=08///

- 01 View a specific form

- 02 Download a specific form
- 03 View a specific publication
- 04 Download a specific publication
- 05 Get an answer to a tax question
- 06 See what changes had been made in tax laws
- 07 Find out how to get help with your taxes
- 95 Other (*Please specify*) \_\_\_\_\_
- 08 Did not access IRS website in the past year

//ASK IF Q19=01//

22. Are you aware that several IRS electronic tax publications, for example Publication 17, now contain a linking feature? That is, they have active hyperlinks within the electronic version of the publication that allow the user to directly connect to a different section within the publication or to an external web page.

- 01 Yes Continue
- 02 No Skip to Question 30

///ASK IF Q19=02 OR Q22=01///

23. Have you used the linking feature in any electronic tax publications?

- 01 Yes Continue
- 02 No Skip to Question 30

//ASK IF Q23=01//

24. If yes, please list the electronic tax publications in which you have used the linking feature.

---



---



---

///ASK IF Q23=01///

25. Has the linking feature in tax publications been beneficial for you?

- 01 Yes Skip to Q27
- 02 No Continue

///ASK IF Q25=02///

26. What makes the linking feature not beneficial for you? Skip to Q28.

---



---



---

///ASK IF Q25=01///

27. What are some of the benefits of the linking feature in tax publications?

---



---



---

///ASK IF Q22=01 AND Q23=01 OR Q25=02///

28. How can we improve the linking feature in tax publications?

---



---



---

///ASK IF Q22=01 AND Q23=01 OR Q25=02///

29. In which additional tax publications would you like to see the linking feature added?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

///ASK IF Q1=01///

30. Take all of these factors into account, how would you rate your overall satisfaction with downloading tax forms, publications and instructions from the IRS website?

Very Satisfied 05	Satisfied 04	Neither satisfied nor dissatisfied 03	Dissatisfied 02	Very Dissatisfied 01	
0	0	0	0	0	

## MARKETING

///ASK IF Q1=01///

Q31. How satisfied are you that you know about changes which have occurred in **tax forms** that you needed to use for the 2009 tax filing season?

Very Satisfied 05	Satisfied 04	Neither satisfied nor dissatisfied 03	Dissatisfied 02	Very Dissatisfied 01	N/A / No Experience 96
0	0	0	0	0	

///ASK IF Q1=01///

Q32. How satisfied are you that you know about changes which have occurred in **publications** that you need to use for the 2009 tax year?

Very Satisfied 05	Satisfied 04	Neither satisfied nor dissatisfied 03	Dissatisfied 02	Very Dissatisfied 01	N/A / No Experience 96
0	0	0	0	0	

///ASK IF Q1=01///

Q33. How satisfied are you with getting information on **tax law changes** for the 2009 tax year?

Very Satisfied 05	Satisfied 04	Neither satisfied nor dissatisfied 03	Dissatisfied 02	Very Dissatisfied 01	N/A / No Experience 96
0	0	0	0	0	

///ASK IF Q1=01///

Q34. How do you find out that tax forms and publications had changed? Please mark all that apply. ///MUL=08///

- 01 IRS website
- 02 IRS workshop
- 03 Professional association
- 04 Word of mouth
- 05 Software programs
- 06 TV, radio, or print advertisements



- 07 Tax Preparer
- 95 Other (*Please specify*) \_\_\_\_\_
- 97 Not sure

**OVERALL RATING**

///ASK IF Q1=01///

Q35. Overall how would you rate the IRS on forms, instructions, publications and other tax products that it develops, produces and distributes to taxpayers?

Very Satisfied 05	Satisfied 04	Neither satisfied nor dissatisfied 03	Dissatisfied 02	Very Dissatisfied 01	96
0	0	0	0	0	

///ASK IF Q1=01///

**CLOSING PAGE**

This is the end of the survey. By clicking Next, you are submitting your answers. You will not be able to go back and make any changes to the survey after clicking Next on this page. Thank you very much for your help.

///ASK IF Q1=01///

**FINAL SCREEN**

On behalf of IRS Media and Publications and ICF Macro, thank you very much for your time. Your survey is complete and your answers have been submitted. You may now close your browser.

If you have any questions about this survey, please contact the survey processing center at 1-866-287-5762 or at [irs.wi.mp@mmail.macrointernational.com](mailto:irs.wi.mp@mmail.macrointernational.com).

**Prototype Customer Satisfaction Survey for External  
Customers of Media and Publications Division:**

**2010 Tax Preparer Survey**

**FINAL Web version**

**Internal Revenue Service  
Tax Forms and Publications Division**

**November 17, 2009**

///PROGRAMMER: IF RESPONDENT SKIPS QUESTION, CODE RESPONSE AS 88///

///PROGRAMMER: NEVER DISPLAY THE RESPONSE CODES, NEVER DISPLAY THE CODE N/A VALUE (96)///

///PROGRAMMER: IF TEXT ON THIS DOCUMENT IS BOLDED, IT SHOULD BE BOLDED ON THE WEB SCREEN AS WELL///

///PROGRAMMER: PLEASE INDICATE A “STOP” BUTTON TO ENABLE SUSPENDING AND IMMEDIATE RESUMING///

///PROGRAMMER: PLEASE POST “FOR TECHNICAL ASSISTANCE, PLEASE CONTACT OUR HELP DESK BY VIA E-MAIL AT [IRS.WI.MP@MMAIL.MACROINTERNATIONAL.COM](mailto:IRS.WI.MP@MMAIL.MACROINTERNATIONAL.COM) OR CALL 866-287-5762.” AT THE BOTTOM OF EACH SCREEN///

///PROGRAMMER: PLEASE INCLUDE A PREVIOUS AND NEXT BUTTON ON EACH PAGE///

**///ASK ALL///**

### **Web Introduction**

Welcome to the IRS Media and Publications Division customer satisfaction survey. ICF Macro Inc., an independent research organization, is working with the IRS to obtain your feedback as a tax preparer about forms, publications, and services that are used to assist customers in understanding, preparing, and filing federal income tax returns.

This survey should take no longer than 20 minutes. You will be able to suspend the survey at any time and re-enter the survey where you left off without losing any of your responses.

If you wish to verify the IRS’s sponsorship of the survey, please click on this link to the IRS website.  
<http://www.irs.gov/formspubs/article/0,,id=109875,00.html>.

Thank you in advance for your participation in this important survey.

**///ASK ALL///**

### **Anonymity and Security**

ICF Macro will hold your identity Anonymous and will provide results to IRS in aggregate. Macro will provide IRS with the raw data with all personally identifying information removed. In addition, the survey is hosted on a secure server. Please feel confident that your answers will be used solely for the purpose stated above.

**///ASK ALL///**

### **Instructions**

Moving forward: Click on the NEXT button to save your responses and continue to the next page.

Moving back: Click on the PREVIOUS button to view your responses on a previous page. You may change your answers to previously entered responses.

Suspending and re-entering: You may suspend the survey at any time by clicking STOP. You may re-enter the survey where you left off by entering the URL provided in your invitation letter and re-entering your password. If you close your browser without clicking STOP, the survey will automatically halt and you will need to wait 10 minutes to re-access the survey.

For technical assistance, please contact our help desk by via e-mail at [IRS.WI.MP@mmail.macrointernational.com](mailto:IRS.WI.MP@mmail.macrointernational.com) or call 866-287-5762.

*Paperwork Reduction Act Notice*

*The Paperwork Reduction Act requires that the IRS display OMB control number on all public information requests. The OMB Control Number for this study is 1545-1349. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to: Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224.*

*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.*

///ASK ALL///

Q1. Approximately how many 2009 federal income tax returns did you prepare for **individuals**?

01 Less than 100

02 100 or more

97 Not sure

///ASK ALL///

Q2. Approximately how many 2009 federal income tax returns did you prepare for **businesses**?

01 Less than 100

02 100 or more

97 Not sure

## TAX FORMS

///ASK ALL///

Q3. How often did you help prepare the following federal tax forms in the most recent tax year?

		Frequentl y	Sometime s	Rarely	Never
		01	02	03	04
Q3A.	Short form 1040EZ	0	0	0	0
Q3B.	Short form 1040A	0	0	0	0
Q3C.	Long form 1040	0	0	0	0
Q3D.	Form 1040-ES	0	0	0	0
Q3E.	Form 940	0	0	0	0
Q3F.	Form 941	0	0	0	0
Q3G.	Form 1065	0	0	0	0
Q3H.	Form 1120	0	0	0	0
Q3I.	Form 1120A	0	0	0	0
Q3J.	Form 1120S	0	0	0	0
Q3K.	Form 1099	0	0	0	0
Q3L.	Schedule A for itemized deductions	0	0	0	0
Q3M.	Schedule B for interest and dividend income	0	0	0	0
Q3N.	Schedule C for small business income	0	0	0	0
Q3O.	Schedule D for capital gains or losses	0	0	0	0
Q3P.	Schedule E for supplemental income	0	0	0	0
Q3Q.	Schedule E for rental income, royalties and trusts	0	0	0	0
Q3R.	Schedule F for farm income	0	0	0	0
Q3S.	Schedule SE	0	0	0	0

///ASK ALL///

Q4. In thinking about your recent experience with federal tax forms, instructions and publications, tell me whether you agree or disagree with the following statements—

		Strongly Agree 05	04	03	02	Strongly Disagree 01	Don't Know/ N/A 96
Q4A.	The graphics and layout made it easy to follow	0	0	0	0	0	0
Q4B.	The size of the print made it easy to read	0	0	0	0	0	0
Q4C.	It was easy to find the information that I was looking for	0	0	0	0	0	0
Q4D.	It was easy to go back and forth between the instructions and the tax form	0	0	0	0	0	0
Q4E.	The section headings were useful	0	0	0	0	0	0
Q4F.	The publication was as clear as possible, given the tax law	0	0	0	0	0	0
Q4G.	I feel confident in the calculations that I made with it	0	0	0	0	0	0

///ASK ALL///

Q5. Thinking about ease of use, ease of understanding and design, how would you rate the following forms?

		Very Good 05	04	03	02	Very Poor 01	Don't Know/ N/A 96
Q5A.	Short form 1040EZ	0	0	0	0	0	0
Q5B.	Short form 1040A	0	0	0	0	0	0
Q5C.	Long form 1040	0	0	0	0	0	0
Q5D.	Schedule A for itemized deductions	0	0	0	0	0	0
Q5E.	Schedule B for interest and dividend income	0	0	0	0	0	0
Q5F.	Schedule C for small business income	0	0	0	0	0	0
Q5G.	Schedule D for capital gains for losses	0	0	0	0	0	0
Q5H.	Schedule E for supplemental income	0	0	0	0	0	0
Q5I.	Schedule F for farm income	0	0	0	0	0	0
Q5J.	Schedule K-1 for partnership income	0	0	0	0	0	0
Q5K.	Other (Please Specify)	0	0	0	0	0	0

///PROGRAMMER: If all selections Q5A-Q5K ≠ 1 or 2, Skip to Q7///

///PROGRAMMER: For any selection Q5A-Q5K = 1 or 2, continue with Q6. Repeat up to a total of 3 times. If more than 3 selections in Q5A-Q5K = 1 or 2, choose only 3 selections at random, then continue to Q7///

///ASK IF Q5A-Q5K = 01 OR 02///

Q6. Please tell us how (Enter appropriate selection from Q5A-Q5K) could be improved?

---



---



---

## TAX INSTRUCTIONS

///ASK ALL///

Q7. In general, how would you rate the following aspects of the federal tax instructions used to file your 2009 returns?

		Very Good 05	04	03	02	Very Poor 01	Didn't Use 96
Q7A.	Table of contents	0	0	0	0	0	0
Q7B.	Important changes	0	0	0	0	0	0
Q7C.	Index	0	0	0	0	0	0
Q7D.	Worksheet	0	0	0	0	0	0
Q7E.	Examples	0	0	0	0	0	0
Q7F.	Flow charts	0	0	0	0	0	0
Q7G.	Appendix	0	0	0	0	0	0
Q7H.	Tax tables	0	0	0	0	0	0

## PUBLICATIONS

///ASK ALL///

Q8. How often did you use the following publications in the 2009 tax year?

		Frequentl y 01	Sometime s 02	Rarely 03	Never 04
Q8A.	Publication 17 - <i>Your Federal Income Tax ( for Individuals)</i>	0	0	0	0
Q8B.	Publication 334 - <i>Tax Guide for Small Businesses</i>	0	0	0	0
Q8C.	Publication 541 - <i>Partnerships</i>	0	0	0	0
Q8D.	Publication 542 - <i>Corporations</i>	0	0	0	0
Q8E.	Publication 583 - <i>Starting a Small Business &amp; Keeping Records</i>	0	0	0	0

///ASK IF ANY IN Q8 < 4 , IF ALL IN Q8=04 SKIP TO Q10///

Q9. In general, how would you rate the following aspects of this publication (s)?

		Very Good 05	04	03	02	Very Poor 01	Don't Know/ N/A 96
Q9A.	Table of contents	0	0	0	0	0	0
Q9B.	Important changes	0	0	0	0	0	0
Q9C.	Index	0	0	0	0	0	0
Q9D.	Worksheet	0	0	0	0	0	0
Q9E.	Examples	0	0	0	0	0	0
Q9F.	Flow charts	0	0	0	0	0	0
Q9G.	Appendix	0	0	0	0	0	0
Q9H.	Tax tables	0	0	0	0	0	0

///ASK ALL///

Q10. Thinking about ease of use, ease of understanding and design, how would you rate each of the following publications? If you have never used the publication, please mark Not Applicable (N/A).

		Very Good 05	04	03	02	Very Poor 01	Don't Know/ N/A 96
Q10A.	Pub 17 - <i>Your Federal Income Tax</i>	0	0	0	0	0	0
Q10B.	Pub 463 - <i>Travel, Entertainment, Gift and Car Expenses</i>	0	0	0	0	0	0
Q10C.	Pub 501 - <i>Exemptions, Standard Deductions and Filing Instructions</i>	0	0	0	0	0	0
Q10D.	Pub 502 - <i>Medical and Dental Expenses</i>	0	0	0	0	0	0
Q10E.	Pub 505 - <i>Tax Withholding and Estimated Tax</i>	0	0	0	0	0	0
Q10F.	Pub 523 - <i>Selling Your Home</i>	0	0	0	0	0	0
Q10G.	Pub 525 - <i>Taxable and Nontaxable Income</i>	0	0	0	0	0	0
Q10H.	Pub 535 - <i>Business Expenses</i>	0	0	0	0	0	0
Q10I.	Pub 550 - <i>Investment Income and Expenses</i>	0	0	0	0	0	0
Q10J.	Pub 590 - <i>Individual Retirement Arrangements (IRAs)</i>	0	0	0	0	0	0
Q10K.	Pub 596 - <i>Earned Income Credit</i>	0	0	0	0	0	0
Q10L.	Pub 946 - <i>How to Depreciate Property</i>	0	0	0	0	0	0
Q10M.	Pub 970 - <i>Tax Benefits for Education</i>	0	0	0	0	0	0



		Very Good 05	04	03	02	Very Poor 01	Don't Know/ N/A 96
Q10 N.	Another Publication (Please Specify)	0	0	0	0	0	0

///PROGRAMMER: IF ALL SELECTIONS Q10A-Q10N ≠ 01 OR 02, SKIP TO Q12 FOR ANY SELECTION Q10A-Q10N = 01 OR 02, CONTINUE WITH Q11. REPEAT UP TO A TOTAL OF 3 TIMES. IF MORE THAN 3 SELECTIONS IN Q10A-Q10N = 01 OR 02, CHOOSE ONLY 3 SELECTIONS AT RANDOM, THEN CONTINUE TO Q12///

///ASK IF Q10A-10N=01 OR 02///

Q11. Please tell us how [Enter appropriate selection from Q10A-Q10N] could be improved?

---



---



---

## MARKETING

///ASK ALL///

Q12. How satisfied are you that you know about changes in **tax forms** you needed to use for the 2009 tax year?

Very Satisfied 05	04	03	02	Very Dissatisfied 01
0	0	0	0	0

///ASK ALL///

Q13. How satisfied are you that you know about changes in **publications** you needed to use for the 2009 tax year?

Very Satisfied 05	04	03	02	Very Dissatisfied 01
0	0	0	0	0

///ASK ALL///

Q14. How do you find out that tax forms and publications have changed? Please mark all that apply. ///MUL=07///

- 01 IRS Website
- 02 IRS Workshop
- 03 Professional Association
- 04 Word of Mouth
- 05 Software Programs
- 06 TV, Radio or Print Advertisements
- 95 Other, Please Specify
- 97 Not Sure

///ASK ALL///

Q15. Are you aware that several IRS electronic tax publications, for example Publication 17, now contain a linking feature? That is, they have active hyperlinks within the electronic version of the publication that allow the user to directly connect to a different section within the publication or to an external web page.

- 01 Yes Continue
- 02 No Skip to Question 23

///ASK IF Q15=01///

Q16. Have you used the linking feature in any electronic tax publications?

- 01 Yes Continue
- 02 No Skip to Question 23

///ASK IF Q16=01///

Q17. If yes, please list the electronic tax publications in which you have used the linking feature.

---

---

---

///ASK IF Q16=01///

Q18. Has the linking feature in tax publications been beneficial for you?

- 01 Yes Skip to Question 20
- 02 No Continue

///ASK IF Q18=02///

Q19. What makes the linking feature not beneficial for you? (Skip to Question 21)

---

---

---

///ASK IF Q18=01///

Q20. What are some of the benefits of the linking feature in tax publications?

---

---

---

///ASK IF Q16=01///

Q21. How can we improve the linking feature in tax publications?

---

---

---

///ASK IF Q16=01///

Q22. In which additional tax publications would you like to see the linking feature added?

---

---

---

## OVERALL RATING

///ASK ALL///

Q23. Overall how would you rate the IRS on forms, instructions, publications and other tax products that it develops, produces and distributes to taxpayers?

Very Satisfied 05	Satisfied 04	Neither satisfied nor dissatisfied 03	Dissatisfied 02	Very Dissatisfied 01
0	0	0	0	0

///ASK ALL///

**CLOSING PAGE**

This is the end of the survey. By clicking Next, you are submitting your answers. You will not be able to go back and make any changes to the survey after clicking Next on this page. Thank you very much for your help.

///ASK ALL///

**FINAL SCREEN**

On behalf of IRS Media and Publications and ICF Macro, thank you very much for your time. Your survey is complete and your answers have been submitted.

You may now close your browser.

If you have any questions about this survey, please contact the survey processing center at 1-866-287-5762 or at [irs.wi.mp@mmail.macrointernational.com](mailto:irs.wi.mp@mmail.macrointernational.com).

**Customer Satisfaction Survey for External Customers of Media and  
Publications Division**

**Volunteer Partner Survey  
FINAL Web Survey  
2010**

**Internal Revenue Service  
Tax Forms and Publications Division  
November 17, 2009**

///PROGRAMMER: IF RESPONDENT SKIPS QUESTION, CODE RESPONSE AS 88///

///PROGRAMMER: NEVER DISPLAY THE RESPONSE CODES, NEVER DISPLAY THE CODE N/A VALUE (96)///

///PROGRAMMER: IF TEXT ON THIS DOCUMENT IS BOLDED, IT SHOULD BE BOLDED ON THE WEB SCREEN AS WELL///

///PROGRAMMER: PLEASE INDICATE A “STOP” BUTTON TO ENABLE SUSPENDING AND IMMEDIATE RESUMING///

///PROGRAMMER: PLEASE POST “For technical assistance, please contact our help desk via e-mail at [IRS.Volunteer.Partners@mmail.macrointernational.com](mailto:IRS.Volunteer.Partners@mmail.macrointernational.com) or call 866-287-5762.” AT THE BOTTOM OF EACH PAGE.///

///PROGRAMMER: PLEASE INCLUDE A PREVIOUS AND NEXT BUTTON ON EACH PAGE///

**///ASK ALL///**

### **Web Introduction**

Welcome to the IRS Stakeholder Partnerships, Education and Communication Partners (SPEC) customer satisfaction survey. MICF Macro Inc., an independent research organization, is working with the IRS to obtain your feedback about forms, publications, and services that are used to assist customers in understanding, preparing, and filing federal income tax returns. We are surveying SPEC partners who provide tax assistance such as outreach and education programs and develop partnerships with national and local organizations to provide free tax return preparation services at Volunteer Income Tax Assistance (VITA) or Tax Counseling for the Elderly (TCE) sites

This survey should take no longer than 15 minutes. You will be able to suspend the survey at any time and re-enter the survey where you left off without losing any of your responses.

If you wish to verify the IRS’s sponsorship of the survey, please click on this link to the IRS website.  
<http://www.irs.gov/formspubs/article/0,,id=109875,00.html>.

Thank you in advance for your participation in this important survey.

**///ASK ALL///**

### **Anonymity and Security**

MICF Macro will hold your identity Anonymous and will provide results to IRS in aggregate. Macro will provide IRS with the raw data with all personally identifying information removed. In addition, the survey is hosted on a secure server. Please feel confident that your answers will be used solely for the purpose stated above.

**///ASK ALL///**

## **Instructions**

- Moving forward: Click on the NEXT button to save your responses and continue to the next page.
- Moving back: Click on the PREVIOUS button to view your responses on a previous page. You may change your answers to previously entered responses.
- Suspending and re-entering: You may suspend the survey at any time by clicking STOP. You may re-enter the survey where you left off by clicking on the survey website from your invitation e-mail.

### *Paperwork Reduction Act Notice*

*The Paperwork Reduction Act requires that the IRS display OMB control number on all public information requests. The OMB Control Number for this study is 1545-1349. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to: Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, Room 6526, 1111 Constitution Ave. NW, Washington, DC 20224.*

### *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.*

**For technical assistance, please contact our help desk by via e-mail at [IRS.Volunteer.Partners@mmail.macroidernational.com](mailto:IRS.Volunteer.Partners@mmail.macroidernational.com) or call 866-287-5762.**

**//ASK ALL//**

Q1. Did your organization participate in the IRS Stakeholder Partnerships, Education and Communication Partners (SPEC) program in the past 12 months?

- 1 Yes
- 2 No

**Thank and terminate**

**///ASK IF Q1=01///**

Q2. How many years have you personally been working with the IRS to provide tax assistance and/or tax education?

- 1 1 to 5 years
- 2 6 to 10 years
- 3 11 to 15 years
- 4 More than 15 years

**///ASK IF Q1=01///**

**///PROGRAMMER: program so that respondent can only select one response///**

Q3. What is the primary nature of your relationship with SPEC?

- 1 Military Volunteer Income Tax Assistance
- 2 Volunteer Income Tax Assistance, or VITA
- 3 Education and Outreach (Communications, products, news articles, or websites)
- 4 Tax Counseling for the Elderly, Non-AARP
- 5 Tax Counseling for the Elderly, AARP
- 95 Something else (*Please specify*) \_\_\_\_\_
- 97 Don't know

**///ASK IF Q1=01///**

Q4. At your site, approximately how many **customers** do you reach through your tax assistance and/or tax education programs each year?

- 1 1 to 50
- 2 51 to 100
- 3 101 to 1000
- 4 1001 to 2500
- 5 More than 2500
- 97 Don't Know

**FEDERAL TAX FORMS AND SCHEDULES**

**///ASK IF Q1=01///**

Q5. How often did you help prepare the following federal tax forms and schedules in the 2009 tax year?

***(Programmer: If Q5 a-m ≠ “Frequently”, skip to Q7. If Q5 a-m = “Frequently”, continue to Q6 and repeat Q6 up to 3 times as required. If more than three items in Q5 a-m = “Frequently”, choose three items at random to continue with Q6. After 3<sup>rd</sup> repetition, continue to Q7.)***

	Frequently <b>01</b>	Sometimes <b>02</b>	Rarely <b>03</b>	Never <b>04</b>
Q5a. Short Form 1040EZ	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q5b. Short Form 1040A	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q5c. Long Form 1040	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q5d. Form 1040ES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q5e. Form 8812 for the Additional Child Tax Credit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q5f. Form 2441 Child and Dependant Care Expenses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q5g. Form 8888 Direct Deposit of Refund to More than One Account	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q5h. Schedule A for Itemized Deductions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q5i. Schedule B for Interest and Dividend Income	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q5j. Schedule C for Profit and Loss From Business (Sole Proprietorship)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q5k. Schedule D for Capital Gains for Losses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q5l. Schedule EIC for the Earned Income Credit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q5m. Other (please specify _____)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

///ASK If Q5 a-m = "Frequently" ///

Q6. How would you rate the following aspects of [insert name of form/schedule]?

	<b>Very Good</b>				<b>Very Poor</b>
	<b>05</b>	<b>04</b>	<b>03</b>	<b>02</b>	<b>01</b>
	▼	▼	▼	▼	▼
Q6a. Table of contents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q6b. Important changes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q6c. Index at back	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q6d. Worksheet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q6e. Examples	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q6f. Flow charts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q6g. Appendix	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q6h. Tax tables	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

///ASK IF Q1=01///.

Q7. In general, how would you rate each of the following IRS forms and schedules?

	<b>Very Good</b>				<b>Very Poor</b>	<b>Don't Know/Not Applicable</b>
	<b>05</b>	<b>04</b>	<b>03</b>	<b>02</b>	<b>01</b>	<b>96</b>
	▼	▼	▼	▼	▼	▼
Q7a. Short Form 1040EZ	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



		Very Good 05 ▼	04 ▼	03 ▼	02 ▼	Very Poor 01 ▼	Don't Know/Not Applicable 96 ▼
Q7b.	Short Form 1040A	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q7c.	Long Form 1040	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q7d.	Form 1040ES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q7e.	Form 8812 for the Additional Child Tax Credit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q7f.	Form 2441 Child and Dependant Care Expenses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q7g.	Form 8888 Direct Deposit of Refund to More than One Account	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q7h.	Schedule A for itemized deductions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q7i.	Schedule B for interest and dividend income	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q7j.	Schedule C for Profit and Loss From Business (Sole Proprietorship)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q7k.	Schedule D for capital gains for losses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q7l.	Schedule EIC for the Earned	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Very Good 05 ▼	04 ▼	03 ▼	02 ▼	Very Poor 01 ▼	Don't Know/Not Applicable 96 ▼
Income Credit						
Q7m. Other (please specify _____)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**///PROGRAMMER: IF Q7 A-M ≠ 1 OR 2, SKIP TO Q9. IF Q7 A-M = 1 OR 2, CONTINUE TO Q8 AND REPEAT UP TO 3 TIMES AS REQUIRED. IF MORE THAN THREE ITEMS IN Q7 A-M = 1 OR 2, CHOOSE THREE ITEMS AT RANDOM TO CONTINUE WITH Q8. AFTER 3<sup>RD</sup> REPETITION, CONTINUE TO Q9///**

**///ASK IF Q7A-M=01 OR 02///**

Q8. Please tell us why you rated [Insert name of form/schedule] poorly.

---



---



---

**///ASK IF Q1=01///**

Q9. In thinking about your recent experience with all federal tax forms, to what extent you agree or disagree with the following statements.

	Strongly Agree 05 ▼	04 ▼	03 ▼	02 ▼	Strongly Disagree 01 ▼
Q9a. The graphics and layout made it easy to follow	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q9b. The size of the print made it easy to read	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q9c. It was easy to find the information I was looking for	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q9d. It was easy to go back and forth between the publication and the tax form	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q9e. The section headings were useful	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q9f. The publication clearly explained what I needed to know	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	<b>Strongly Agree</b>				<b>Strongly Disagree</b>
	<b>05</b>	<b>04</b>	<b>03</b>	<b>02</b>	<b>01</b>
	▼	▼	▼	▼	▼
Q9g.I feel confident in the calculations that I made with it	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**FEDERAL TAX INSTRUCTIONS**

///ASK IF Q1=01///

Q10. In general, how would you rate the following aspects of federal tax instructions?

	<b>Very Good</b>				<b>Very Poor</b>	<b>Don't Know/ Not Applicable</b>
	<b>05</b>	<b>04</b>	<b>03</b>	<b>04</b>	<b>05 ▼</b>	<b>96</b>
	▼	▼	▼	▼		▼
Q10a. Table of contents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q10b. Important changes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q10c. Index at back	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q10d. Worksheet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q10e. Examples	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q10f. Flow charts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q10g. Appendix	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**FEDERAL TAX PUBLICATIONS**

///ASK IF Q1=01///

Q11. How often did you use the following federal tax publications in the 2009 tax year?

	<b>Frequently</b>	<b>Sometimes</b>	<b>Rarely</b>	<b>Never</b>
	<b>01</b>	<b>02</b>	<b>03</b>	<b>04</b>
Q11a. Publication 17 -Your Federal Income Tax (For Individuals)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q11b. Publication 596- Earned Income Credit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q11d. Publication 554 - Older Americans' Tax Guide	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

///ASK IF Q1=01///

.Q12. If you used other publications frequently during the 2009 tax year, please list up to three others below.

Q12a. Frequently used pub #1 (Please specify) \_\_\_\_\_

Q12b. Frequently used pub #2 (Please specify) \_\_\_\_\_

Q12c. Frequently used pub #3 (Please specify) \_\_\_\_\_

**///PROGRAMMER: IF Q 11 A-C = "FREQUENTLY" AND/OR Q12 A-C HAS AN ENTRY, CONTINUE TO Q13. REPEAT Q13 AS REQUIRED UP TO THREE TIMES. IF MORE THAN THREE ITEMS EITHER IN Q11 A-C = "FREQUENTLY" OR HAVE AN ENTRY IN Q12 A-C, CHOOSE THREE ITEMS AT RANDOM TO ASK ABOUT IN Q13 . AFTER 3<sup>RD</sup> REPETITION OF Q13, CONTINUE TO Q14.///**

**///ASK IF Q 11 A-C = "FREQUENTLY" AND/OR Q12 A-C HAS AN ENTRY///**

Q13. In general, how would you rate the following aspects of [insert name of federal tax publication]?

	<b>Very Good</b>				<b>Very Poor</b>
	<b>05</b>	<b>04</b>	<b>03</b>	<b>02</b>	<b>01</b>
	▼	▼	▼	▼	▼
Q13a. Table of contents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q13b. Important changes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q13c. Index at back	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q13d. Worksheet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q13e. Examples	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q13f. Flow charts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q13g. Appendix	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q13h. Tax tables	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**///ASK IF Q1=01/// .**

Q14. In general, how would you rate each of the following IRS publications?

	<b>Very Good</b>				<b>Very Poor</b>	<b>Don't Know/Not Applicable</b>
	<b>05</b>	<b>04</b>	<b>03</b>	<b>02</b>	<b>01</b>	<b>96</b>
	▼	▼	▼	▼	▼	▼
Q14a. Pub 17 Your Federal Income Tax	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

		Very Good 05	04	03	02	Very Poor 01	Don't Know/Not Applicable 96
		▼	▼	▼	▼	▼	▼
Q14b.	Pub 3 Armed Forces' Tax Guide	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q14c.	Pub 501 Exemptions, Standard Deductions and Filing Instructions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q14d.	Pub 502 Medical and Dental Expenses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q14e.	Pub 505 Tax Withholding and Estimated Tax	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q14f.	Pub 523 Selling Your Home	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q14g.	Pub 550 Investment Income and Expenses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q14h.	Pub 553 Highlights of Tax Changes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q14i.	Pub 554 Older Americans' Tax Guide	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q14j.	Pub 590 Individual Retirement Arrangements (IRAs)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q14k.	Pub 596 Earned Income Credit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IQ14l.	Pub 970 Tax Benefits for Education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Q14m.	Other, please specify	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**(///PROGRAMMER: IF Q14 A-M ≠ 1 OR 2, SKIP TO Q16. IF Q14A-M = 1 OR 2, CONTINUE TO Q15. REPEAT Q15 UP TO THREE TIMES AS REQUIRED. IF MORE THAN THREE ITEMS IN Q14 = 1 OR 2, CHOOSE THREE ITEMS AT RANDOM TO ASK ABOUT IN Q15 . AFTER 3<sup>RD</sup> REPETITION OF Q15, CONTINUE TO Q16.///)**

///ASK IF Q14a-m=01 OR 02///

Q15. Please tell us why you rated *[Insert name of form/schedule]* poorly.

---



---



---

**MARKETING**

**///ASK IF Q1=01///**

Q16. How satisfied are you that you know about changes which have occurred in **tax forms** that you needed to use for 2009 tax filing season?

	O	O	O	O	O
	<b>Very Satisfied</b>	<b>Satisfied</b>	<b>Neither satisfied nor dissatisfied</b>	<b>Dissatisfied</b>	<b>Very Dissatisfied</b>
	<b>05</b>	<b>04</b>	<b>03</b>	<b>02</b>	<b>01</b>
▼		▼	▼	▼	▼

**///ASK IF Q1=01///**

Q17. How satisfied are you with getting information on **tax law changes** for the current filing season?

	O	O	O	O	O
	<b>Very Satisfied</b>	<b>Satisfied</b>	<b>Neither satisfied nor dissatisfied</b>	<b>Dissatisfied</b>	<b>Very Dissatisfied</b>
	<b>05</b>	<b>04</b>	<b>03</b>	<b>02</b>	<b>01</b>
▼		▼	▼	▼	▼

**///ASK IF Q1=01///**

Q18. How do you find out when tax forms, instructions and publications have changed?

*Please check all that apply.*

	<b>Tax Forms 01</b>	<b>Publications 02</b>
.Q18a. IRS Website	<input type="checkbox"/>	<input type="checkbox"/>
Q18b. IRS workshop	<input type="checkbox"/>	<input type="checkbox"/>
Q18c. IRS Relationship Manager/SPEC Contact	<input type="checkbox"/>	<input type="checkbox"/>
Q18d. Professional association	<input type="checkbox"/>	<input type="checkbox"/>
Q18e. Word of mouth	<input type="checkbox"/>	<input type="checkbox"/>
Q18f. Software programs	<input type="checkbox"/>	<input type="checkbox"/>
Q18g. TV, radio or print advertisements	<input type="checkbox"/>	<input type="checkbox"/>

		Tax Forms 01	Publications 02
Q18h.	Other #1 <i>(Please specify)</i> _____	<input type="checkbox"/>	<input type="checkbox"/>
Q18i.	Other #2 <i>(Please specify)</i> _____	<input type="checkbox"/>	<input type="checkbox"/>
Q18j.	Not sure	<input type="checkbox"/>	<input type="checkbox"/>

///ASK IF Q1=01///

Q19. How satisfied are you with the way the IRS communicates changes in federal tax products to its customers?

O	O	O	O	O
<b>Very Satisfied</b>	<b>Satisfied</b>	<b>Neither satisfied nor dissatisfied</b>	<b>Dissatisfied</b>	<b>Very Dissatisfied</b>
05	04	03	02	01
▼	▼	▼	▼	▼

///ASK IF Q1=01///

Q20. Are you aware that several IRS electronic tax publications, for example Publication 17, now contain a linking feature? That is, they have active hyperlinks within the electronic version of the publication that allow the user to directly connect to a different section within the publication or to an external web page.

- 1 Yes **Continue**
- 02 No **Skip to Question 28**

///ASK IF Q20=01/// Q21. Have you used the linking feature in any electronic tax publications?

- 01 Yes **Continue**
- 02 No **Skip to Question 28**

///ASK IF Q21=01///

. Q22. If yes, please list the electronic tax publications in which you have used the linking feature.

---



---



---

///ASK IF Q21=01///

Q23. Has the linking feature in tax publications been beneficial for you?

- 1 Yes **Skip to Question 25**
- 02 No **Continue**

///ASK IF Q23=02///

Q24. What makes the linking feature not beneficial for you? **(Skip to Question 26)**

---

---

---

///ASK IF Q23=01///

Q25. What are some of the benefits of the linking feature in tax publications?

---

---

---

///ASK IF Q23=01 OR 02///

Q26. How can we improve the linking feature in tax publications?

---

---

---

///ASK IF Q23=01 OR 02///

27. In which additional tax publications would you like to see the linking feature added?

---

---

---

**OVERALL RATING**

///ASK IF Q1=01///

Q28. Overall how would you rate the IRS on forms, instructions, publications and other tax products that it develops, produces and distributes to taxpayers?

○	○	○	○	○
<b>Very Satisfied</b>	<b>Satisfied</b>	<b>Neither satisfied nor dissatisfied</b>	<b>Dissatisfied</b>	<b>Very Dissatisfied</b>
<b>05</b>	<b>04</b>	<b>03</b>	<b>02</b>	<b>01</b>
▼	▼	▼	▼	▼

///ASK IF Q1=01///

**CLOSING PAGE**

This is the end of the survey. By clicking Next, you are submitting your answers. You will not be able to go back and make any changes to the survey after clicking Next on this page. Thank you very much for your help.

///ASK IF Q1=01///

**FINAL SCREEN**

On behalf of IRS Media and Publications and ICF Macro, thank you very much for your time. Your survey is complete and your answers have been submitted.

You may now close your browser.



***Customer Satisfaction Survey for External Customers of Media and Publications  
Division***

**2010 Forms Distribution Survey  
Web version**

**Internal Revenue Service  
Tax Forms and Publications Division**

**November 16, 2010**

## CUSTOMER CLASSIFICATION

1. What is your primary relationship to the IRS? Are you .... ? *Please check only one*
  - Tax Forms Outlet Program (TFOP)
  - Community Based Outlet Program (CBOP)
  - International Program (INTL)
  - Other Please specify \_\_\_\_\_
  - Don't know
  
2. In what type of business or government agency do you work? *Please check only one*
  - Credit union
  - Copy center
  - Grocery
  - Library
  - Pharmacy
  - Post office
  - City/County government offices
  - Military installation
  - Prison
  - Federal government
  - Department of State
  - Embassy/Consulate
  - Other, please specify \_\_\_\_\_

## TAX PRODUCT ORDERING AND FULFILLMENT

3. During the current tax year, about how many people obtained federal tax products from your location?
  - None **[Terminate survey] Thank you**
  - 1-250
  - 251-500
  - More than 500
  
4. How did you order the federal tax forms, instructions, publications or other federal tax products for the most current tax year? *Please select all that apply.*
  - E-Order (E-mail) **[If checked, include Q5; otherwise, skip Q5]**
  - Telephone **[If checked, include Q7; otherwise, skip Q7]**
  - Mail Order form/quantity survey **[If checked, include Q9; otherwise, skip Q9]**
  - Other. Please specify \_\_\_\_\_
  
5. How would you rate your experience with ordering your federal tax products by E-Order (E-mail) and e-mail confirmation
  - 5 - Very easy
  - 4 - Easy
  - 3 - Neither Easy nor Difficult
  - 2 - Difficult go to Q6
  - 1 - Very difficult go to Q6
  
6. What made it difficult

7. How would you rate your experience with ordering your federal tax products by telephone?
- 5 - Very easy
  - 4 - Easy
  - 3 - Neither Easy nor Difficult
  - 2 - Difficult go to Q8
  - 1 - Very difficult go to Q8
8. What made it difficult
9. How would you rate your experience with ordering your federal tax products by mail order form?
- 5 - Very easy
  - 4 - Easy
  - 3 - Neither Easy nor Difficult
  - 2 - Difficult go to Q10
  - 1 - Very difficult go to Q10
10. What made it difficult
11. How would you rate your experience with obtaining prior year forms, instructions, and publications?
- 5 - Very easy
  - 4 - Easy
  - 3 - Neither Easy nor Difficult
  - 2 - Difficult go to Q12
  - 1 - Very difficult go to Q12
  - Don't require
12. What made it difficult?
13. If you are using reproducibles (**federal tax products that you can copy**), do you consider this a valuable resource.
- 5 - Very valuable [Skip to Q16]
  - 4 [Skip to Q16]
  - 3 [Skip to Q16]
  - 2
  - 1 – Not at all valuable [go to Q14]
  - Not aware of this product [go to Q15]
14. What makes reproducibles not valuable to you?
- 
- 
15. If you are not familiar with the reproducible products would you be interested in learning how you could benefit from this program.
- Yes
- No
16. Did you receive all, some, or none of the current federal tax year products that you ordered?

- All **[Skip to Q18]**
- Some **[go to Q17]**
- None **[go to Q17]**

17. Please list the products that you did not receive.

---



---

18. **[If Q16=None, Skip to Q21]** Did the tax products you ordered arrive in a timeframe that met your program needs.

- Always **[Skip to Q21]**
- Some of the time
- Never

19. Which federal tax products were not received within the timeframe to meet your program needs?

---



---

20. On average, how much later than were those products received?

- 1 week
- 2 weeks
- 3 weeks
- 1 month
- More than a month

21. Were you informed in advance that your products would not be received in a timeframe that met your program needs?

- Yes
- No

22. How would you rate your experience with receiving communications from the IRS explaining the status of your order?

- 5 - Very satisfied
- 4 - Satisfied
- 3 - Neither Satisfied nor Dissatisfied
- 2 - Dissatisfied
- 1 - Very dissatisfied
- Did not receive

23. When you did not receive the current federal tax year products you ordered to meet your program needs, which of the following did you do?

*Please check all that apply.*

- Checked the IRS programs, including website, for product availability or delays
- Downloaded product(s) from the web
- Called or e-mailed the Tax Forms Outlet Program (TFOP)
- Called the Community Based Outlet Program (CBOP)
- Called or e-mailed the International Program (INTL)
- Took no action **[Skip to Q26]**
- Other Please specify \_\_\_\_\_

24. How easy was it for you to reach the IRS about your late or missing product(s)?
- 5 - Very easy **[Skip to Q26]**
  - 4 - Easy **[Skip to Q26]**
  - 3 - Neither Easy nor Difficult **[Skip to Q26]**
  - 2 - Difficult
  - 1 - Very difficult
25. What did you find difficult about reaching the IRS concerning your late or missing product(s)?
- 
- 
26. **[If Q16=None, Skip to Q36]** How satisfied were you with how the IRS resolved issues with the product(s) that were delivered late or not at all?
- 5 - Very satisfied
  - 4 - Satisfied
  - 3 - Neither Satisfied nor Dissatisfied
  - 2 - Dissatisfied
  - 1 - Very dissatisfied
27. What is the best method for the IRS to get updated information to you?
- Internet
  - E-Mail
  - Mail
  - Other Please specify \_\_\_\_\_
28. **[If Q16=None, Skip to Q37]** did you receive your order in multiple shipments?
- Yes
  - No **[Skip to Q31]**
  - Don't know **[Skip to Q31]**
29. Did receiving multiple shipments present any challenges or difficulties for you?
- Yes
  - No **[Skip to Q32]**
30. Please describe the challenges you encountered in receiving your order in multiple shipments.
- 
- 
31. If possible would you like to receive your products in multiple shipments?
- Yes
- No
32. Did you receive the most current federal tax products you ordered in good usable condition?
- Yes **[Skip to Q37]**
  - No
33. Which federal tax products were not received in a usable condition?
- 
-

34. When you did not receive the federal tax products that you ordered in a usable condition, which of the following did you do? *Please check all that apply.*
- Called the IRS
  - Downloaded product from the web
  - Called or e-mailed the Tax Forms Outlet Program (TFOP)
  - Called the Community Based Outlet Program (CBOP)
  - Called or e-mailed the International Program (INTL)
  - Did nothing
  - Other, please specify \_\_\_\_\_

35. How would you describe your experience with reaching the IRS (CBOP/TFOP/International Program) about your unusable product?
- 5 - Very easy **[Skip to Q37]**
  - 4 - Easy **[Skip to Q37]**
  - 3 - Neither Easy nor Difficult **[Skip to Q37]**
  - 2 - Difficult
  - 1 - Very difficult

36. What was difficult about reaching the IRS about tax products that were not usable?
- \_\_\_\_\_
- \_\_\_\_\_

37. Overall, how would you rate your satisfaction with the IRS order and delivery process for federal tax products and services?
- 5 - Very satisfied **[Skip to Q39]**
  - 4 - Satisfied **[Skip to Q39]**
  - 3 - Neither Satisfied nor Dissatisfied **[Skip to Q39]**
  - 2 - Dissatisfied
  - 1 - Very dissatisfied

38. What were the reason(s) for your dissatisfaction with the IRS order and delivery process for federal tax products and services?
- \_\_\_\_\_
- \_\_\_\_\_

39. Much effort has been put into improving partner communications with \_\_\_\_\_ the creation of informative publications; web based hot topics, and timely \_\_\_\_\_ e-mail status notifications. Are these improvements allowing you to \_\_\_\_\_ better serve your constituents?
- Yes
  - No

40. In your opinion, what would be the most important improvements that the IRS could make in its tax forms order, delivery and communications process for distribution?
- \_\_\_\_\_
- \_\_\_\_\_

*Paperwork Reduction Act Notice*

*The Paperwork Reduction Act requires that the IRS display OMB control number on all public information requests. The OMB Control Number for this study is XXXX-XXXX. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to: Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, Room 6526, 1111 Constitution Ave. NW, Washington, DC 20224*

**Survey Communications**

## **Example Pre-Notification Letter Business Taxpayer Survey**

[IRS LOGO]

[IRS DEPARTMENT LETTERHEAD]

[DATE]

JOHN Q SAMPLE  
SAMPLE ADDRESS 1  
SAMPLE ADDRESS 2  
SAMPLE ADDRESS 3  
ANYTOWN, US 12345-6789

Dear [INSERT NAME]:

I am asking for your help in improving the level of service the IRS provides businesses. In a few days, you will receive a survey asking for your opinions about the resources available to you when you prepare your tax returns. By completing this survey, you will help the IRS develop a comprehensive portfolio of service improvements.

This brief survey, which can be completed via the Web or by mail, should take about 20 minutes to complete. Macro International Inc., an independent research company, is administering the survey and will keep your individual identity Anonymous. Macro International will not provide any identifying information to the IRS along with your responses. Your responses will be reported to the IRS in aggregate with the responses from other tax professionals. Your participation is voluntary.

We are committed to improving service to every customer. Your survey will arrive in the mail with a week. It will also include instructions for completing the survey via the Web. Please help us in this effort by completing and returning the survey as soon as possible.

Sincerely,

Name  
Title  
Wage and Investment Division



## **Survey Communications**

### **Example Cover Letter – First Survey Business Taxpayer Survey**

# Macro International

IRS Customer Survey  
126 College Street  
Burlington, VT 05401

[DATE]

JOHN Q SAMPLE  
SAMPLE ADDRESS 1  
SAMPLE ADDRESS 2  
SAMPLE ADDRESS 3  
ANYTOWN, US 12345-6789

Dear [INSERT NAME]:

A few days ago, you received a letter from Name, Title, Wage and Investment Division, IRS, asking for your assistance in improving the IRS resources available to businesses. The IRS is committed to improving its performance and service to the American public and its partners. As part of this improvement effort, the IRS is conducting a survey of businesses that prepare and file business tax returns.

You were chosen at random from a list of businesses. Macro International Inc., an independent research company, is administering the survey. You may complete the survey either by mail or online. If you choose to complete it online, you can access the survey from any computer that has Internet access by copying the following Internet address into your browser:

[www.business2009survey.com](http://www.business2009survey.com)

Once you access the website for the survey, you will be asked to provide a unique password. Please enter the password below:

PASSWORD [Note to RDC: Password will be generated from sample for each survey recipient.]

This password that will enable you to exit the survey and re-enter at a later time. It will also protect any data you have entered if you experience any computer disruptions. Macro International will not share these passwords with the IRS at any time during or after this study.

Macro International will keep your responses and individual identity Anonymous and will not provide any identifying information to the IRS along with your responses. Your responses will be reported to the IRS in aggregate with the responses from other businesses. While your participation is voluntary, we strongly encourage you to complete and return the survey.

The survey should take about 15 minutes to complete. If you are completing the survey by mail, please use the postage-paid reply envelope to return your completed survey by [insert day/date]. If you have any questions or concerns, please feel free to call us toll free at 1-866-377-8208.

Thank you in advance for your cooperation.

Sincerely,

John Hurley  
Project Director

## **Survey Communications**

### **Example Reminder Postcard Business Taxpayer Survey**

## **Do We Have Your Input Yet?**

Recently, you received a survey asking for your opinions about the IRS resources that are available to you as a business when preparing your business' tax returns.

If you have already completed and returned the survey, please accept our sincere thanks. If not, please take a few minutes to complete and return the survey today. Your input is very important, and we want to be sure that we include your feedback.

If you did not receive the survey, or it has been misplaced, please call us at 1-866-377-8208. When contacting us, you may also request your unique password to complete the survey online ([www.business2009survey.com](http://www.business2009survey.com)).

John Hurley  
Project Director

## **Survey Communications**

### **Example Cover Letter – Second Survey Business Taxpayer Survey**

# Macro International

IRS Customer Survey  
126 College Street  
Burlington, VT 05401

[DATE]

JOHN Q SAMPLE  
SAMPLE ADDRESS 1  
SAMPLE ADDRESS 2  
SAMPLE ADDRESS 3  
ANYTOWN, US 12345-6789

Dear [INSERT NAME]:

Recently, you received a survey requesting your input on the IRS resources available to business owners. So far, we have not received your completed survey. As described in our previous communications, on behalf of the IRS, we are administering a nationwide survey to gather reliable information from businesses that prepare and file business tax returns. Your responses are critical to our efforts to enhance the resources available to businesses.

If you have not already done so, please take a few minutes, today, to provide your feedback to the IRS either by mail or online. Macro International Inc., an independent research company, is administering the survey. If you choose to complete it online, you can access the survey from any computer that has Internet access by copying the following Internet address into your browser:

[www.business2009survey.com](http://www.business2009survey.com)

Once you access the website for the survey, you will be asked to provide a unique password. Please enter the password below:

PASSWORD [Note to RDC: Password will be generated from sample for each survey recipient.]

This password that will enable you to exit the survey and re-enter at a later time. It will also protect any data you have entered if you experience any computer disruptions. Macro International will not share these passwords with the IRS at any time during or after this study.

Macro International will keep your responses and individual identity Anonymous and will not provide any identifying information to the IRS along with your responses. Your responses will be reported to the IRS in aggregate with the responses from other businesses. While your participation is voluntary, we strongly encourage you to complete and return the survey by DAY/DATE.

The survey should take about 20 minutes to complete. If you are completing the survey by mail, please use the postage-paid reply envelope to return your completed survey. If you have any questions or concerns, please feel free to call us toll free at 1-866-377-8208.

Thank you in advance for your cooperation.

Sincerely,

John Hurley  
Project Director