

## 2010 Tax Forum Customer Satisfaction Survey

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Default to **location** based on dates

- After OMB Approval: Atlanta
- July 13-15: Chicago
- July 27-29: Orlando
- August 10-12: New York
- August 24-26: Las Vegas
- Aug 31-Sep 2: San Diego

**1. Profession** (check all that apply):

- Electronic Return Originator
- Software Developer
- Reporting Agent
- Transmitter
- Intermediate Service Provider
- Financial Institution
- Tax Preparer
- Circular 230 Participant
  - o Enrolled Agent
  - o Certified Public Accountant
  - o Attorney
- Other \_\_\_\_\_

**2. What assistance did you receive in the Preparer Services Room today?** (check all that apply)

- Submitted a new IRS *e-file* Application
- Got fingerprinted or submitted professional credentials
- Created a username and password to access e-services
- Reset your e-services password
- Other: \_\_\_\_\_

**3. Did you know about these services prior to visiting the Preparer Services Room today?**

- Yes
- No

**4. Did you attempt to complete the task(s) prior to visiting the Preparer Services Room today?**

- No
- Yes
  - o **How did you attempt to complete the task(s) before today?** (check all that apply)
    - Visited [www.irs.gov](http://www.irs.gov)
    - E-mailed the IRS
    - Called the IRS
      - o e-help Desk
      - o Practitioner Priority Services

- Other
- Postal mail
- Asked a friend or colleague
- Other \_\_\_\_\_

**5. What was your overall level of satisfaction with the service(s) you received in the Preparer Services Room today?**

(Radio buttons) Scale of 1 to 5

**6. Is this your first tax forum?**

- Yes
- No
  - How many others have you attended? \_\_\_\_\_

**7. How can we improve the Preparer Services Room?**

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**8. Have you ever contacted the e-help Desk?**

- Yes
  - If yes, was your contact by telephone, e-mail or postal mail?
    - Telephone
    - E-mail
    - Postal mail
- No (skip to question 10)

**9. Thinking back to your most recent contact with the e-help Desk, how would you rate your overall level of satisfaction with the service(s) you received?**

Scale of 1 to 5

**10. Your opinion is very valuable to us. Please tell us how we can improve e-help Desk services.** \_\_\_\_\_

**11. Are you a registered user of e-services?**

- Yes
  - As a registered user of e-services, what e-services product(s) do you use most frequently? (check all that apply)
    - Disclosure Authorization (DA)
    - Transcript Delivery System (TDS)
    - Electronic Account Resolution (EAR)
    - Taxpayer Identification Number (TIN) Matching
    - e-file Application
  - If you had the option of having your copy of a taxpayer account notice delivered to your e-services secure mailbox **instead of** receiving paper notices, how likely would you be to choose this option?
    - Very likely
    - Somewhat likely
    - Not very likely

- Not at all likely
- Not authorized to receive copies of any taxpayer notices

o What do you like most about e-services?

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o How can we improve e-services?

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No

o Why not?

- Not familiar with e-services products
- Do not need to use e-services
- Too difficult to get started
- Other \_\_\_\_\_