Russell RESEARCH

2010 e-Services Customer Satisfaction Survey

RESPONDENT ID#_____ (05-08)

CIRCLE SAMPLE TYPE...   **Heavy Users** (n=500)..1   ...09

Medium-Level Users (n=500)...2

Low-Level Users (n=400)..3

Eligible Non-Users (n=500)...4

PHONE # (AC-_____)   _____

CITY_____ST_____ZIP_____ST CODE_____

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

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

		Disc	NA	Unavail	Ref	NQ	Comp	
1	DATE:_____TIME:_____(am) (pm)	1	2	3	4	5	6	...11
2	DATE:_____TIME:_____(am) (pm)	1	2	3	4	5	6	...12
3	DATE:_____TIME:_____(am) (pm)	1	2	3	4	5	6	...13
4	DATE:_____TIME:_____(am) (pm)	1	2	3	4	5	6	...14
5	DATE:_____TIME:_____(am) (pm)	1	2	3	4	5	6	...15
6	DATE:_____TIME:_____(am) (pm)	1	2	3	4	5	6	...16
7	DATE:_____TIME:_____(am) (pm)	1	2	3	4	5	6	...17
8	DATE:_____TIME:_____(am) (pm)	1	2	3	4	5	6	...18
9	DATE:_____TIME:_____(am) (pm)	1	2	3	4	5	6	...19
10	DATE:_____TIME:_____(am) (pm)	1	2	3	4	5	6	...20

INTERVIEWER_____

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

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

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

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

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

PAGE 2

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

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

- **All <u>tax professionals registered with e-Services</u> can use the <u>Registration</u> and <u>Online e-file Application</u> services.**

- **And, <u>all e-file providers who e-file 5 or more accepted returns a year</u> can use the <u>Disclosure Authorization</u>, <u>Electronic Account Resolution</u>, and <u>Transcript Delivery System</u> services.**

- **In addition, <u>any payer of income subject to backup withholding or their reporting agents</u> can use the <u>Taxpayer Identification Number or TIN Matching</u> service.**

To access e-Services, a tax practitioner or qualified taxpayer or their reporting agent must go to the e-Services site at the IRS's website, irs.gov, and register.

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

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

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

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

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

_____x
_____x

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

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

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

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

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

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

INTERVIEWER: <u>IF RESPONDENT IS FROM A LIST LABELED "Heavy Users", "Medium-Level Users", or "Low-Level Users", CONTINUE WITH "USER" SECTION OF SURVEY (Qs 4-17).   IF RESPONDENT IS FROM LIST LABELED "Eligible Non-Users", SKIP TO THE "NON-USER" SECTION OF SURVEY (AND ASK Qs 18-24 NEXT).</u> WHEN FINISHED WITH APPROPRIATE SECTION, CONTINUE ALL RESPONDENTS THROUGH ALL REMAINING QUESTIONS, WHICH START AT Q25.   NOTE: <u>IF RESPONSES INDICATE THAT A PERSON MAY HAVE BEEN MISTAKENLY INCLUDED IN THE WRONG LIST,</u> COMPLETE THE INTERVIEW, BUT THEN SEE YOUR SUPERVISOR, WHO WILL REPORT THE INSTANCE AND BE DIRECTED TO KEEP/REPLACE THE SURVEY.

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

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

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

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

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

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

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

7.   What, if anything, do you particularly <u>like</u> about the e-Services program overall? Please be as specific as possible. (ENTER RESPONSES <u>VERBATIM</u> BELOW & PROBE UNTIL RESPONSE IS EXHAUSTED.)

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

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

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

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

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

      COMMENT #1:_____

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

      All e-Services 1   A particular service 2---PROBE: Which one? (ENTER)_____   CODE VS. LIST OF E-SERVICES.

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      COMMENT #2:_____

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

All e-Services 1   A particular service 2---PROBE: Which one? (ENTER)_____

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COMMENT #3:_____

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

All e-Services 1   A particular service 2---PROBE: Which one? (ENTER)_____

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COMMENT #4:_____

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

All e-Services 1   A particular service 2---PROBE: Which one? (ENTER)_____

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ASK ALL "USERS":

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

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

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

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

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

	Yes	No	
☐ IRS Nationwide Tax Forums...1	1	2	...00
☐ Small Business Tax Workshop......................................1	1	2	...00
☐ Tax Practitioner Institute Seminars.............................1	1	2	...00
☐ Practitioner Liaison Meetings.......................................1	1	2	...00
☐ National Or Local Phone Forums & Webinars For Practitioners. .1	1	2	...00
☐ Tax Practitioner Video & Audio Presentations............................1	1	2	...00

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

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

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

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

	Col. 12 e-Services Ever Used	Once A Week Or More	Several Times A Month	About Once A Month	Several Times A Year	About Once A Year Or Less Often	Don't Read: DK/ Can't Say	
☐ e-Services Registration.....................................1 00	1	1	2	3	4	5	y	...00-00
☐ Online *e-file* Application...................................3		1	2	3	4	5	y	...00
☐ Disclosure Authorization.................................4		1	2	3	4	5	y Q17	...00
☐ Electronic Account Resolution........................5		1	2	3	4	5	y	...00

☐ Transcript Delivery System.............................6	1	2	3	4	5	y	...00
☐ Taxpayer Identification Number (TIN) Matching 7	1	2	3	4	5	y	...00

14. **You mentioned that you've used the** (INSERT NAME OF SERVICE) **service at the e-Services site at irs.gov. Based upon your experience in using this service, how satisfied are you with it. Please use the same rating scale from before – Very Satisfied, Somewhat Satisfied, Somewhat Dissatisfied, or Very Dissatisfied.** (CIRCLE ONE RATING PER SERVICE USED.)

15. (IF LESS THAN "VERY" SATISFIED WITH SERVICE IN Q14, FOLLOW IMMEDIATELY WITH:) **You seem to be less than fully satisfied with the** (INSERT NAME OF SERVICE) **service at the e-Services site. What specifically would you suggest to the IRS that would improve this particular service?** (INTERVIEWER: PROBE DEEPLY HERE TO MAKE SURE EACH SUGGESTION IS SPECIFIC AND CLEAR.)

	e-Services Regi-stration	Online e-file Application	Disclosure Authori-zation	Electronic Account Resolution	Trans-script Delivery System	Taxpayer ID Number (TIN) Matching
Q14—SATISFACTION RATING:						
Very Satisfied	4	4	4	4	4	4
Somewhat Satisfied	3	3	3	3	3	3
Somewhat Dissatisfied	2	2	2	2	2	2
Very Dissatisfied	1	1	1	1	1	1
(DON'T READ:) Don't Know/Can't Say	y	y	y	y	y	y

Q15—IF NOT "VERY" SATISFIED ABOVE,
SUGGESTIONS FOR IMPROVEMENT OF SERVICE:

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16. (IF NOT "VERY SATISFIED" WITH "THE AVAILABILITY OF SPECIFIC SERVICES THAT YOU NEED" IN Q10, ASK:) **You also indicated earlier that you're <u>not fully satisfied with the types of services available</u> at the e-Services site at irs.gov. What <u>specific service or services would you like to have available</u> at the e-Services site which are not offered there now?** (ENTER <u>VERBATIM</u> & <u>PROBE FOR A SPECIFIC AND FULL DESCRIPTION</u> OF EACH DESIRED SERVICE.)

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17. (IF "<u>DISCLOSURE AUTHORIZATION</u>" <u>NOT USED IN Q12</u> OR USED ONLY ONCE A MONTH OR LESS OFTEN IN Q13, ASK:) **You indicated that you do not use the Disclosure Authorization service at the e-Services site very often. <u>What can the IRS do to increase your usage of this particular e-service?</u>** (ENTER <u>VERBATIM</u> & <u>PROBE FOR A SPECIFIC AND FULL RESPONSE</u>.)

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IF FROM "ELIGIBLE NON-USER" LIST, CONTINUE WITH NON-USER SECTION – Qs 18-24.

<u>INTERVIEWER, NOTE: IN ASKING QUESTIONS OF NON-USERS, KEEP IN MIND THAT THE NON-USER LIST MAY INCLUDE PEOPLE WHO HAVE REGISTERED FOR E-SERVICES BUT NOT USED IT OR NOT USED IT OFTEN ENOUGH TO BE CONSIDERED "USERS".</u>

CLIENT NOTE: NON-USERS HAVE COME DIRECTLY FROM PAGE 2, WHERE THEY HAVE JUST HEARD THE OVERALL DESCRIPTION OF E-SERVICES.

18. **Based upon everything you now know about e-Services, <u>how likely are you to use it, or use it more often, in the future</u>? Are you...**(READ CHOICES AND CIRCLE ONE ANSWER BELOW.)

Very Likely.. 4	...00
Somewhat Likely.. 3	
Not Very Likely... 2	
Not At All Likely.. 1	
(DON'T READ, BUT CIRCLE IF:) Don't Know/Can't Say...y	

19. **<u>What, if anything, do you think you would like about the e-Services program</u>? Please be as specific as possible.** (ENTER RESPONSES <u>VERBATIM</u> BELOW & PROBE UNTIL RESPONSE IS EXHAUSTED.)

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

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

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

1) _____

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(PROBE FURTHER:)_____

2) _____

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(PROBE FURTHER:)_____

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

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

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

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

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① e-Services **Registration** is a one-time, online process where you select a username, password and signature PIN. Successful registration is acknowledged onscreen and a confirmation letter is sent to your home.

② The **Online e-file Application** allows the principal or responsible official of a firm to apply for participation in IRS *e-file*. Approved applications can be maintained by certain users and the ability to delegate e-Services incentive product access to other employees also exists.

③ The **Disclosure Authorization** service enables you to view, modify, and submit new or existing Powers of Attorney or Tax Information Authorizations receiving immediate acknowledgement of acceptance.

④ The **Electronic Account Resolution** service enables you to submit taxpayer account inquiries and receive a written response in your secure online mailbox within 3 business days. You must have a Power of Attorney, Form 2848, on file for the particular taxpayer, form, and tax period requested.

⑤ The **Transcript Delivery System** service enables you to submit requests and view online, taxpayer account transcripts, wage & income documents, return transcripts, and verification of non-filing letters.   You must have a Power of Attorney, Form 2848, on file for the particular taxpayer, form, and tax period requested.

⑥ **TIN Matching** is a pre-filing service used to validate **Taxpayer ID Numbers**. It is available to Payers of income subject to backup withholding who filed within the past two years, any one of six information returns: Forms 1099-B, INT, DIV, OID, PATR, or MISC. You can match up to 25 payee TIN & name combinations in an *Interactive* online request or you can submit a *Bulk* file of up to 100,000 TIN and name combinations. Interactive requests are processed immediately and bulk requests can take up to 24 hours. Responses to both types of requests are delivered online.

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

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

	① e-Services Registration	② Online e-file Application	③ Disclosure Authorization	④ Electronic Account Resolution	⑤ Transcript Delivery System	⑥ Taxpayer ID Number (TIN) Matching
<u>Q23—WOULD YOU QUALIFY FOR THIS SERVICE</u>?						
Yes...1	1	1	1	1	1
No..2	2	2	2	2	2
(DON'T READ:) Don't Know/Can't Say.................y	y	y	y	y	y
<u>Q24—LIKELIHOOD OF FUTURE USE OF THIS SERVICE</u>:						
Very Likely..4	4	4	4	4	4
Somewhat Likely...3	3	3	3	3	3
Not Very Likely..2	2	2	2	2	2
Not At All Likely...1	1	1	1	1	1
(DON'T READ:) Don't Know/Can't Say.................y	y	y	y	y	y

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

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

A Person Responsible For Tax Reporting & Preparation For One Company (BUSINESS TAXPAYERS) 1...00

A Professional In A Tax And Payroll Reporting Service (REPORTING AGENTS).......................2

A Person Being Interviewed Here On Behalf Of A Chain Of Tax Preparation Firms (BIG TWO/ETC.)
3

A Professional Tax Preparer.. 4
A Financial Planner, With Tax Preparation Being Just One Of Your Services.......................5
An Accountant or CPA, With Tax Preparation Being Just One Of Your Services...................6
Or Some Other Type Of Professional, With Tax Preparation Being Just One Of Your Services
(SPECIFY: What Type Of Profession?)_____x

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

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

It's A Full-Time Occupation For Me...1   ...00

It's One Of My Occupations, And I Do Other Kinds Of Work............................2
It's Something I Only Do During Tax Season...3

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

1-4 years...1   ...00
5-9 years...2
10-19 years..3
20-29 years..4
30 years or more..5
(DON'T OFFER AS A CHOICE, BUT CIRCLE IF:) Refused...y

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

Work Alone As An Independent...1   ...00

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

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

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

TOTAL ACTIVE TAX PREPARERS WORKING FOR FIRM……………_____   ...00-00

30. **And approximately how many total FEDERAL tax returns – including both quarterly and annual Business Returns and Individual Returns -- were prepared last tax season, that is, in 2010 for Tax Year 2009, by all of the Preparers at all of the locations of your firm throughout the U.S., including yourself?** (ENTER # BELOW & ASK RESPONDENT TO CONFIRM IT.)

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

31. **Approximately what percent of your firm's FEDERAL Tax Preparation business in 2010 was Individual FEDERAL Tax Return Preparation and what percent was Business FEDERAL Tax Return Preparation?** (ENTER % FOR EACH – MUST ADD TO 100%.)

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

32. (IF EITHER "INDIVIDUAL" OR "BUSINESS" HAVE 1%+ ABOVE FOR **2010**, ASK FOR PERCENT OF EACH THAT WERE E-FILE, AS FOLLOWS:) **And approximately what percent of your firm's 2010 FEDERAL (Individual) (Business) <u>Tax Returns</u> were electronically filed, using e-file?** (ENTER % E-FILE FOR EACH TYPE OF RETURN WITH 1%+ IN QUESTION ABOVE & REPEAT PERCENT AND ASK RESPONDENT TO CONFIRM IT.)

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

REMAINING QUESTIONS ARE ASKED OF ALL RESPONDENTS:

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

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

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

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

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

> Client Note: Qs. 36-38 are used to see if IRS can learn from the website/online preferences of the target audience.

36. **First, let me read a short list of different types of Internet or Online services or sites. After I read each one, please tell me whether you ever use that type of Online service or site.** (READ LIST & CIRCLE ALL THAT APPLY UNDER COL. 36 BELOW. THEN ASK Q37.)

37. (FOR EACH ONLINE SERVICE/ACTIVITY CIRCLED AS <u>EVER USED</u> IN Q36, ASK:) **About <u>how often do you use</u>...**(INSERT NAME OF SERVICE)**? Is that...**(READ FREQUENCY SCALE AND CIRCLE ONLY ONE ANSWER FOR EACH SERVICE/ACTIVITY UNDER COL. 37.)

	Col. 36 Online Services/Sites Ever Used	At Least Once A Day	Several Times A Week Or More	About Once A Week	Several Times A Month	About Once A Month	Less Often	
☐ Online Shopping Websites	1	1	2	3	4	5	6	...00-00
☐ Online Service Sites Such As Photo Archives, Memorials, etc.	2	1	2	3	4	5	6	...00
☐ Online Banking	3	1	2	3	4	5	6	...00
☐ Online Blogs, Weblogs, or Discussion Sites	4	1	2	3	4	5	6	...00
☐ Online Credit Card Records & Points Accumulation Sites	5	1	2	3	4	5	6	...00
☐ Government Sites Other Than irs.gov or e-Services	6	1	2	3	4	5	6	...00

38. (FOR EACH TYPE OF ONLINE SERVICE/SITE CIRCLED AS <u>EVER USED</u> IN Q36, ASK:) **You (also) mentioned that use** (READ TYPE OF SITE)**. Of all of the different sites you've ever used for this online service/activity, which one would you say is the best at serving your needs?** (ENTER ONE SITE/ANSWER FOR EACH TYPE OF SERVICE/SITE IN THE APPROPRIATE SPACE BELOW. THEN, CONTINUE UNTIL YOU HAVE ASKED THIS QUESTION FOR EACH SERVICE/SITE CIRCLED IN Q36.)

THE BEST Online Shopping Website IS.._____
....
THE BEST Online Service Site Such As Photo Archives, Memorials, etc. IS_____
....-_____

THE BEST Online Banking Site IS.._____

....

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

....

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

....

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

....

39. **Finally, for analytical purposes only – is your <u>age</u>...**(READ LIST & CIRCLE ONE ANSWER.)

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

40. **CIRCLE <u>GENDER</u>** (WHICH SHOULD NOW BE APPARENT)...

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

<u>**CLOSING COMMENTS**</u>
That completes the survey. We are required by law to provide you with the OMB (Office Of Management and Budget) Control Number for this public information request. That number is <u>1545-1432</u>. In addition, if you have any comments about the time estimate to complete the survey or ways to improve the survey, you may write to the IRS. Would you like the address? (IF YES, ADDRESS IS...) *Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224.*