

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

**2010 Individual Taxpayer Survey**

**FINAL CATI Version**

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

**Revised  
February 3, 2010**

**SCREENER INTRODUCTION**

///ASK ALL///

Hello, my name is [CALLER NAME] calling from Vendor 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)
- 07 A paid preparer, like an accountant or tax service, or a volunteer Thank and terminate call; dispo 38
- 97 DON'T KNOW Thank and terminate with dispo 161 (>1 dispo 2)

99 REFUSED Thank and terminate with dispo 161 (>1 dispo 2)

///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 20 minutes for most customers. Vendor will not provide any identifying information to the IRS along with your responses and will hold your identity private to the extent permitted by law. We will not ask you about the details of your tax return itself. Your participation is very important to help the IRS design products and services that meet the needs of taxpayers. Is this a good time to complete this survey?

[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 Continue
- 02 NO ///Schedule Callback; dispo 104, 105///
- 99 REFUSED /// Thank and terminate with dispo 161 (>1 dispo 2)

**INDIVIDUAL TAXPAYER**

**/ASK IF S2=01//**

**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; dispo 36

03 No. Have not yet filed Federal income tax return for 2009. Thank and terminate call; dispo 37

97 DON'T KNOW Thank and  
terminate with dispo 161 (>1 dispo 33)

99 REFUSED Thank and  
terminate with dispo 161 (>1 dispo 33)

///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 Thank and terminate call; dispo 38

03 Someone else outside your household (SPECIFY) Thank and terminate call; dispo 38

97 DON'T KNOW Thank and  
terminate with dispo 161 (>1 dispo 33)

99 REFUSED Thank and  
terminate with dispo 161 (>1 dispo 33)

//ASK IF Q2=03//

Q2OTH ENTER OTHER MENTION \_\_\_\_\_

///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 Thank and  
terminate with dispo 161 (>1 dispo 33)

99 REFUSED  
terminate with dispo 161 (>1 dispo 33)

Thank and

///ASK IF Q3=01 OR 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 Q7  
Continue

97 DON'T KNOW  
terminate with dispo 161 (>1 dispo 33)

Thank and

99 REFUSED  
terminate with dispo 161 (>1 dispo 33)

Thank and

///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  
(or 33 if > 1)

Ask person's name and skip to Q4C  
Thank and terminate call; dispo 161

03 Person not available

Ask person's name and continue to Q4B.

97 DON'T KNOW  
terminate with dispo 161 (>1 dispo 33)

Thank and

99 REFUSED  
terminate with dispo 161 (>1 dispo 33)

Thank and

//SHOW THI IF Q4A=01 THEN CONTINUE TO Q4C//

ID\_CB

[INTERVIEWER: ASK PERSON'S NAME]

[INTERVIEWER: YOU CAN ACCEPT INITIALS, NAME, GENDER, POSITION IN HOUSEHOLD  
OR ANY INFORMATION TO IDENTIFY THE RESPONDENT]

01 ENTER NAME/ETC

97 DON'T KNOW GO TO Q4C  
99 REFUSED GO TO Q4C

//ASK IF ID\_CB=01//  
ID\_NAME  
[RECORD THEIR 1<sup>ST</sup> NAME OR OTHER INFORMATION.]

///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 Thank and  
terminate with dispo 161 (>1 dispo 33)

99 REFUSED Thank and  
terminate with dispo 161 (>1 dispo 33)

///ASK IF Q4A=01///  
Q4C. [When the correct person is on the phone] Hello, my name is [CALLER NAME] calling from Vendor 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 with dispo 161 (>1 dispo 33)

99 REFUSED Thank and  
terminate with dispo 161 (>1 dispo 33)

///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;  
dispo 161 (or 33 if > 1)

97 DON'T KNOW  
terminate with dispo 161 (>1 dispo 33)

Thank and

99 REFUSED  
terminate with dispo 161 (>1 dispo 33)

Thank and

///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 20 minutes for most customers. Vendor will not provide any identifying information to the IRS along with your responses and will hold your identity private to the extent permitted by law. We will not ask you about the details of your tax return itself. Your participation is very important to help the IRS design products and services that meet the needs of taxpayers. Is this a good time to complete this survey?

[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 Continue
- 02 NO ///Schedule Callback///
- 99 REFUSED /// Thank and terminate call; dispo 161 (or 33 if > 1)

///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 Using tax preparation software

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

///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 Q9
- 02 1040A US Individual Income Tax Return Skip to Q9

03 1040 US Individual Tax Return

97 DON'T KNOW

Thank and terminate call; dispo 39

99 REFUSED

Thank and terminate call; dispo 39

**FORMS EVALUATION**

///ASK IF Q5=03///

Q6. Which of the following schedules or forms, if any, did you file with your Form 1040? [Read list. Select all that apply.]

- A. Schedule A for itemized deductions
- B. Schedule B for interest and dividend income
- C. Schedule C for small business income
- D. Schedule D for capital gains and losses
- E. Schedule E for supplemental income
- F. Schedule F for farm income
- G. Schedule EIC for Earned Income Credit
- H. Schedule L for the standard deduction for certain filers
- I. Schedule M for Making Work Pay and Government Retiree Credits
- J. Form 5405 for the First-Time Homebuyer Credit
- K. Form 8863 for Education Credits (Hope and Lifetime Learning Credits)

01 Used form/schedule

02 Did not use form/schedule

97 DON'T KNOW

99 REFUSED

///ASK IF Q5=03///

Q6AA. Did you use any forms or schedules other than the ones we have asked about?

01 Yes

02 No

97 DON'T KNOW

99 REFUSED

///ASK IF Q6AA=01///

PREQ6BB. What other forms or schedules did you use?

01 ENTER RESPONSE\_\_\_\_\_

97 DON'T KNOW

99 REFUSED

//ASK Q6BB if PREQ6BB=01//

Q6BB \_\_\_\_\_

/// IF Q6 Item A=01, ASK Q6C Item A///

/// IF Q6 Item B=01, ASK Q6C Item B///

/// IF Q6 Item C=01, ASK Q6C Item C///

/// IF Q6 Item D=01, ASK Q6C Item D///  
/// IF Q6 Item E=01, ASK Q6C Item E///  
/// IF Q6 Item F=01, ASK Q6C Item F///  
/// IF Q6 Item G=01, ASK Q6C Item G///  
/// IF Q6 Item H=01, ASK Q6C Item H///  
/// IF Q6 Item I=01, ASK Q6C Item I///  
/// IF Q6 Item J=01, ASK Q6C Item J///  
/// IF Q6 Item K=01, ASK Q6C Item K///

Q6C. Please rate your satisfaction with each of the following schedules and forms that you used on a scale of 1 to 5 where 1 is very dissatisfied and 5 is very satisfied. If you did not use a particular schedule or form, please tell me.

- A. Schedule A for itemized deductions
- B. Schedule B for interest and dividend income
- C. Schedule C for small business income
- D. Schedule D for capital gains and losses
- E. Schedule E for supplemental income
- F. Schedule F for farm income
- G. Schedule EIC for Earned Income Credit
- H. Schedule L for the standard deduction for certain filers
- I. Schedule M for Making Work Pay and Government Retiree Credits
- J. Form 5405 for the First-Time Homebuyer Credit
- K. Form 8863 for Education Credits (Hope and Lifetime Learning Credits)

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///

Q9. Now I'm going to ask you a few questions about your experiences with the most current tax forms, publications 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 getting tax forms and instructions
- C. The ease of determining which forms and instructions you needed
- D. The ease of understanding tax forms
- E. Knowing what you needed to do to complete the forms
- F. The completeness of instructions
- G. The ease of understanding the instructions



H. The ease of finding answers in the publications

- 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**

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

Now I'm going to ask you a few additional 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 Skip to Q22
- 99 REFUSED

///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-M; Q11N "Other" should always be read last.]

- 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. Did you use something else? (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
- 95 OTHER (specify)
- 97 DON'T KNOW
- 99 REFUSED

///ASK IF Q13(a-n)=95//

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

///ASK Q14 (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  
99 REFUSED

Skip to Q16  
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 Q16 (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 Q17 (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. It was easy to go back and forth between the form and the instructions
- G. The section headings were useful
- H. The publication was as clear as possible, given the tax law
- I. 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
- 99 REFUSED

///ASK Q18 (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 9///

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

- 01 IRS office
- 02 IRS website
- 03 VITA or TCE site
- 04 Tax preparer/accountant
- 05 Through the mail
- 06 Tax preparation software or computer program
- 07 Library
- 08 Post office
- 95 OTHER (SPECIFY)

- 97 DON'T KNOW
- 99 REFUSED

///ASK IF Q21=95//

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

**WEBSITE AND ELECTRONIC FORMS EVALUATION**

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

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 or view forms and publications and instructions?

- 01 YES
- 02 NO

Skip to Q33

97 DON'T KNOW Skip to Q33  
99 REFUSED Skip to Q33

///ASK IF Q22=01///

Q23. Have you ever obtained tax forms, instructions or publications from the IRS website (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?/// ///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 instructions
- D. Download instructions
- E. View a specific publication
- F. Download a specific publication
- G. Get an answer to a tax question
- H. See what changes had been made in tax laws
- I. Find out how to get help with your taxes
- J. Any other reasons?

01 YES  
02 NO

97 DON'T KNOW  
99 REFUSED

//ASK IF Q25J=01//

Q25JOTH Other (SPECIFY)\_\_\_\_\_

//IF Q24=1-94 AND ANY Q25A-J=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.

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

//ASK if PREQ36=01//  
PREQ36AA Are there any other electronic publications you are most familiar with?

- 01 GAVE RESPONSE
- 02 NONE
- 97 DON'T KNOW
- 99REFUSED

///ASK IF PREPREQ36AA=01//  
Q36AA [INTERVIEWER: ENTER RESPONSE\_\_\_\_\_]

//ASK if PREQ36AA=01//  
PREQ36BB Are there any other electronic publications you are most familiar with?

- 01 GAVE RESPONSE
- 02 NONE
- 97 DON'T KNOW
- 99REFUSED

///ASK IF PREQ36BB=01//  
Q36BB [INTERVIEWER: ENTER RESPONSE\_\_\_\_\_]

///ASK IF PREQ36=01 AND PREQ36AA=01///  
Q36A. Which electronic publication are you most familiar with?  
//PROGRAMMER, recall answers from Q36, Q36AA and Q36BB

- 01 //RECALL RESPONSE TO Q36//
- 02//RECALL RESPONSE TO Q36AA//
- 03//RECALL RESPONSE TO Q36BB//
- 04 NONE
- 97 DON'T KNOW
- 99REFUSED

//ASK IF Q36A=01-03//  
I'd like you to think about the electronic publication you are most familiar with.

///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



- D. Worksheet
- E. Examples
- F. Flow charts
- G. Appendix
- H. Tax tables
- I. 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. [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. [INTERVIEWER: ENTER RESPONSE \_\_\_\_\_]

///ASK IF Q35=01///

Q39A. Are you aware that 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. 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. P[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. [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. [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. [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///

Q40A. 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 instructions 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 the availability of 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.]

//mul=8/

- 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 (specify)
- 97 DON'T KNOW
- 99 REFUSED

//ASK IF Q43=95//

Q43oth (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 its forms, instructions and publications 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
  
- 97 DON'T KNOW
- 99 REFUSED

///ASK IF Q46=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 – IRS told 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 (Specify)
- \_\_\_\_\_ 99 REFUSED

//ASK IF Q47=07//

Q47oth (Specify) \_\_\_\_\_

**NOTICE RESOLUTION**

/ASK IF Q46=01/

Q50. Who "handled" the notice?

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

- 05 Other \_\_\_\_\_
- 97 DON'T KNOW
- \_\_\_\_99 REFUSED

//ASK IF Q50=05//  
 Q50oth (Specify) \_\_\_\_\_

/ASK IF Q50=01/  
 //mul=5//

- 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
  - \_\_\_\_97 DON'T KNOW
  - \_\_\_\_99 REFUSED

//ASK IF Q51=05//  
 Q51oth (Specify) \_\_\_\_\_

/ASK IF Q50=03/  
 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)\_\_\_\_\_
- \_\_\_\_97 DON'T KNOW
- \_\_\_\_99 REFUSED

//ASK IF Q52=04//  
 Q52oth (Specify) \_\_\_\_\_

//ASK IF Q46=01//  
 Q53. Recalling your experience with the notice, 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 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

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

- 97 DON'T KNOW
- 99 REFUSED

**//ASK IF Q46=01//**

Q53H Please indicate what you didn't like about the notice) \_\_\_\_\_

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

**//ASK IF Q53H=01/**

**Q53H\_OTH ENTER RESPONSE**\_\_\_\_\_

## **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 REFUSED

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

Q55. Is your gender.....

- 01 Male
- 02 Female

- 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
- 95 OTHER (specify)
- 97 DON'T KNOW
- 99 REFUSE

//ASK IF Q58=95//

Q58OTH(SPECIFY)\_\_\_\_\_

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

Q59. What 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 provide an OMB control number relating to all public information requests along with the address where you can send comments regarding the survey. The OMB number for this survey 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 survey, 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 Vendor 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 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. Vendor, 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//**

**Privacy and Security**

Vendor will not provide any identifying information to the IRS along with your responses and will hold your identity private to the extent permitted by law. . Vendor will provide results to IRS in aggregate and 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 via e-mail at 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
- 02 No
- 97 Not Sure

///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 business federal 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 1065 B for a Partnership
- 05 1040 Schedule C for an Individual
- 06 1040 Schedule E for an Individual
- 07 1040 Schedule F 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 Prepared return using software (electronically)
- 97 Not sure

///ASK IF Q1=01///

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

- 01 Filed paper tax return by regular mail
- 02 Filed electronically by computer (e-file)
- 97 Not sure

///ASK IF Q1=01///

Q7. Did your business pay estimated taxes in 2009?

- 01 Yes
- 02 No
- 97 Not sure

///ASK IF Q7=01///

Q8. How did you determine your estimated tax payments in 2009?

- 01 Tried to accurately estimate the required payment based on this year's data
- 02 Based it on safe harbor of paying 100% of prior year taxes.
- 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

///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<br>05 | Satisfied<br>04 | Neither Satisfied nor Dissatisfied | Dissatisfied<br>02 | Very Dissatisfied<br>01 |
|--|--|----------------------|-----------------|------------------------------------|--------------------|-------------------------|

|        |   |                       |                       |                       |                       |                       |
|--------|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
|        |   |                       |                       | 03                    |                       |                       |
| Q12A . | Knowing where to find tax forms and instructions                | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Q12B . | The ease of getting tax forms and instructions                  | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Q12C . | The ease of determining which forms and Instructions you needed | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Q12 D. | The ease of understanding the forms                             | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Q12E . | Knowing what you needed to do to complete the forms             | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Q12F . | The ease of understanding the instructions for the form         | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Q12 G. | The completeness of instructions                                | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Q12 H. | The completeness of the publications                            | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Q12I.  | Ease of understanding the publications                          | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Q12J.  | The ease of finding answers in the publications                 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

**PUBLICATIONS**

///ASK IF Q1=01///

///PROGRAMMER: IF Q13 = "DID NOT USE" FOR ALL SELECTIONS Q13A-Q13E, 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<br>01 | Used Electronic Publication<br>02 | Did Not Use<br>03     |
|--------|--|--------------------------------|-----------------------------------|-----------------------|
| Q13A . | Pub 15 Circular E, Employer's Tax Guide        | <input type="radio"/>          | <input type="radio"/>             | <input type="radio"/> |
| Q13B . | Pub 509 Tax Calendars for 2010                 | <input type="radio"/>          | <input type="radio"/>             | <input type="radio"/> |
| Q13C . | Pub 544 Sales and Other Dispositions of Assets | <input type="radio"/>          | <input type="radio"/>             | <input type="radio"/> |
| Q13 D. | Pub 946 How To Depreciate Property             | <input type="radio"/>          | <input type="radio"/>             | <input type="radio"/> |
| Q13E . | Other #1 (Please specify) _____                | <input type="radio"/>          | <input type="radio"/>             | <input type="radio"/> |
|        |  |                                |                                   |                       |
|        |  |                                |                                   |                       |

///ASK IF Q13= 'USED PRINTED PUBLICATION" OR "USED ELECTRONIC PUBLICATION" FOR ANY SELECTION Q13A-Q13E ///

///PROGRAMMER: SHOW ONLY THOSE SELECTIONS Q13.1A-Q13.1E FOR WHICH CORRESPONDING SELECTIONS Q13A-Q13E= "USED PRINTED PUBLICATION" OR "USED ELECTRONIC PUBLICATION"

Q13.1 Thinking about your overall satisfaction, how would you rate each of the following publications? If you have never used the publication, please mark Not Applicable (N/A)?

|         |  | Very Satisfied<br>05  | Satisfied<br>04       | Neither Satisfied nor Dissatisfied<br>03 | Dissatisfied<br>02    | Very Dissatisfied<br>01 | Don't Know/<br>N/A<br>96 |
|---------|--|-----------------------|-----------------------|--|-----------------------|-------------------------|--------------------------|
| Q13.1A  | Pub 15 - Circular E, Employer's Tax Guide        | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>                    | <input type="radio"/> | <input type="radio"/>   | <input type="radio"/>    |
| Q13.1B  | Pub 509 - Tax Calendars for 2010                 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>                    | <input type="radio"/> | <input type="radio"/>   | <input type="radio"/>    |
| Q13.1C  | Pub 544 - Sales and Other Dispositions of Assets | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>                    | <input type="radio"/> | <input type="radio"/>   | <input type="radio"/>    |
| Q13.1D  | Pub 946 - How To Depreciate Property             | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>                    | <input type="radio"/> | <input type="radio"/>   | <input type="radio"/>    |
| Q13.1E. | Other #1 (Please specify) _____                  | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>                    | <input type="radio"/> | <input type="radio"/>   | <input type="radio"/>    |
|         |  |                       |                       |  |                       |                         |                          |
|         |  |                       |                       |  |                       |                         |                          |

///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<br>01 | Used 2 <sup>nd</sup> Most Often<br>02 | Used 3 <sup>rd</sup> Most Often<br>03 |
|------|---|-----------------------|---------------------------------------|---------------------------------------|
| Q14A | Pub 15 - Circular E, Employer's Tax Guide | <input type="radio"/> | <input type="radio"/>                 | <input type="radio"/>                 |
| Q14B | Pub 509 - Tax Calendars for 2010          | <input type="radio"/> | <input type="radio"/>                 | <input type="radio"/>                 |



|           |  |                       |                       |                       |
|-----------|--|-----------------------|-----------------------|-----------------------|
| Q14C<br>. | Pub 544 - Sales and Other Dispositions of Assets | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Q14<br>D. | Pub 946 - How To Depreciate Property             | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Q14E<br>. | Other #1 (Please specify) _____                  | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
|           |  |                       |                       |                       |
|           |  |                       |                       |                       |

///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".///

|           |   | Publication<br>Used Most<br>Often<br>01 | Publication<br>Used 2 <sup>nd</sup><br>Most Often<br>02 | Publication<br>Used 3 <sup>rd</sup><br>Most Often<br>03 |
|-----------|---|---|---|---|
| Q15A<br>. | Tax form instructions referred me to it | <input type="radio"/>                   | <input type="radio"/>                                   | <input type="radio"/>                                   |
| Q15B<br>. | List of publications in instructions    | <input type="radio"/>                   | <input type="radio"/>                                   | <input type="radio"/>                                   |
| Q15C<br>. | IRS website                             | <input type="radio"/>                   | <input type="radio"/>                                   | <input type="radio"/>                                   |
| Q15<br>D. | From doing taxes in previous years      | <input type="radio"/>                   | <input type="radio"/>                                   | <input type="radio"/>                                   |
| Q15E<br>. | IRS mailed it to me                     | <input type="radio"/>                   | <input type="radio"/>                                   | <input type="radio"/>                                   |
| Q15F<br>. | From my tax preparer                    | <input type="radio"/>                   | <input type="radio"/>                                   | <input type="radio"/>                                   |
| Q15<br>G. | Word of mouth                           | <input type="radio"/>                   | <input type="radio"/>                                   | <input type="radio"/>                                   |
| Q15<br>H. | 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 (Please specify) _____ | 0 | 0 | 0 |
|-------|------------------------------|---|---|---|

///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<br>05 | Good<br>04 | Neutral<br>03 | Poor<br>02 | Very Poor<br>01 | Did not use<br>N/A<br>96 |
|------|-------------------|-----------------|------------|---------------|------------|-----------------|--------------------------|
| Q16A | Table of contents | 0               | 0          | 0             | 0          | 0               | 0                        |
| Q16B | Important changes | 0               | 0          | 0             | 0          | 0               | 0                        |
| Q16C | Index at back     | 0               | 0          | 0             | 0          | 0               | 0                        |
| Q16D | Worksheet         | 0               | 0          | 0             | 0          | 0               | 0                        |
| Q16E | Examples          | 0               | 0          | 0             | 0          | 0               | 0                        |
| Q16F | Flow charts       | 0               | 0          | 0             | 0          | 0               | 0                        |
| Q16G | Appendix          | 0               | 0          | 0             | 0          | 0               | 0                        |
| Q16H | Tax tables        | 0               | 0          | 0             | 0          | 0               | 0                        |
| Q16I | Tips              | 0               | 0          | 0             | 0          | 0               | 0                        |

///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<br>05 | Agree<br>04 | Neither Agree or Disagree<br>03 | Disagree<br>02 | Strongly Disagree<br>01 | Did not use<br>96 |
|------|--|----------------------|-------------|---------------------------------|----------------|-------------------------|-------------------|
| Q17A | The language was understandable.   | 0                    | 0           | 0                               | 0              | 0                       | 0                 |
| Q17B | The graphics and layout made it easy to follow.                                | 0                    | 0           | 0                               | 0              | 0                       | 0                 |
| Q17C | The size of the print made it easy to read.                                    | 0                    | 0           | 0                               | 0              | 0                       | 0                 |
| Q17D | It was easy to find the information that I was looking for.                    | 0                    | 0           | 0                               | 0              | 0                       | 0                 |
| Q17E | It was easy to go back and forth between the publication and the instructions. | 0                    | 0           | 0                               | 0              | 0                       | 0                 |
| Q17F | The section headings were useful.  | 0                    | 0           | 0                               | 0              | 0                       | 0                 |
| Q17G | The publication was as clear as possible, given the tax law.                   | 0                    | 0           | 0                               | 0              | 0                       | 0                 |

|         |   |   |   |   |   |   |   |
|---------|---|---|---|---|---|---|---|
| 7<br>H. | I feel confident in the calculations that I made. | ○ | ○ | ○ | ○ | ○ | ○ |
|---------|---|---|---|---|---|---|---|

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

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

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**IRS WEBSITE QUESTION TO CONTRACTOR, SHOULD THESE QUESTION BE MOVED AFTER Q11?**

///ASK IF Q1=01///

Q19 Are you aware that the IRS has a website ([www.irs.gov](http://www.irs.gov)) where you can view and/or obtain forms, publications and instructions?

- 01 Yes
- 02 No

//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. For which of following purposes did you use the IRS website for last year? 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 View instructions
- 06 Download instructions
- 07 Get an answer to a tax question
- 08 See what changes had been made in tax laws
- 09 Find out how to get help with your taxes
- 95 Other *(Please specify)* \_\_\_\_\_
- 10 Did not access IRS website in the past year

///ASK ALL///

Q22. Are you aware that the IRS electronic tax publications are available in both pdf and html format?

- 01 Yes
- 02 No

//ASK IF Q19=01//

Q23. 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
- 02 No

///ASK IF Q19=02 OR Q23=01///

Q24. Have you used the linking feature in any electronic tax publications?

- 01 Yes
- 02 No

//ASK IF Q24=01//

Q25. If yes, please list the electronic tax publications in which you have used the linking feature.

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///ASK IF Q24=01///

Q26. Has the linking feature in tax publications been beneficial for you?

- 01 Yes
- 02 No

///ASK IF Q26=01///

Q27. What are some of the benefits of the linking feature in tax publications?

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///ASK IF Q26=02///

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

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///ASK IF Q23=01///

Q29. How can we improve the linking feature in tax publications?

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///ASK IF Q1=01///

Q30. Taking 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<br>05 | Satisfied<br>04 | Neither satisfied<br>nor dissatisfied<br>03 | Dissatisfied<br>02 | Very<br>Dissatisfied<br>01 |  |
|--------------|----------------------|-----------------|---|--------------------|----------------------------|--|
|              | 0                    | 0               | 0   | 0                  | 0                          |  |
| Forms        |                      |                 |   |                    |                            |  |
| Instructions |                      |                 |   |                    |                            |  |
| Publications |                      |                 |   |                    |                            |  |

**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<br>05 | Satisfied<br>04 | Neither satisfied<br>nor dissatisfied<br>03 | Dissatisfied<br>02 | Very<br>Dissatisfied<br>01 | N/A /<br>No Experience<br>96 |
|----------------------|-----------------|---|--------------------|----------------------------|------------------------------|
| 0                    | 0               | 0   | 0                  | 0                          |                              |

///ASK IF Q1=01///

Q32. How satisfied are you that you know about changes which have occurred in **instructions** that you needed to use for the 2009 tax filing season?

| Very Satisfied<br>05 | Satisfied<br>04 | Neither satisfied<br>nor dissatisfied<br>03 | Dissatisfied<br>02 | Very<br>Dissatisfied<br>01 | N/A /<br>No Experience<br>96 |
|----------------------|-----------------|---|--------------------|----------------------------|------------------------------|
| 0                    | 0               | 0   | 0                  | 0                          |                              |

///ASK IF Q1=01///

Q33. 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<br>05 | Satisfied<br>04 | Neither satisfied<br>nor dissatisfied<br>03 | Dissatisfied<br>02 | Very<br>Dissatisfied<br>01 | N/A /<br>No Experience<br>96 |
|----------------------|-----------------|---|--------------------|----------------------------|------------------------------|
| 0                    | 0               | 0   | 0                  | 0                          |                              |

///ASK IF Q1=01///

Q34. How satisfied are you with getting information on **tax law changes** for the 2009 tax year?

| Very Satisfied<br>05 | Satisfied<br>04 | Neither satisfied<br>nor dissatisfied<br>03 | Dissatisfied<br>02 | Very<br>Dissatisfied<br>01 | N/A /<br>No Experience<br>96 |
|----------------------|-----------------|---|--------------------|----------------------------|------------------------------|
| 0                    | 0               | 0   | 0                  | 0                          |                              |

///ASK IF Q1=01///

Q35. How do you find out that tax forms and publications have changed? Please mark all that apply. ///MUL=08///

- 01 IRS website
- 02 Taxpayer Assistance Center (TAC) or Volunteer Income Tax Assistance (VITA)
- 03 IRS Tax Forums
- 04 Professional association
- 05 Word of mouth
- 06 Software programs
- 07 TV, radio, or print advertisements
- 08 Tax Preparer
- 95 Other (*Please specify*) \_\_\_\_\_
- 97 Not sure

## **RECEIPT AND TOPIC OF NOTICE**

///ASK ALL///

Q36. In the past 12 months, have you received a notice from the IRS?

- 01 Yes
- 02 No

///ASK IF Q36=01///

Q37. 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 my tax return
- 05 Don't remember
- 06 Don't know (the notice wasn't clear)
- 07 Other \_\_\_\_\_

## **NOTICE RESOLUTION**

///ASK IF Q36=01///

Q38. Who handled the notice?

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

///ASK IF Q38=01///

Q39. 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 Did nothing
- 06 Don't remember
- 07 Other \_\_\_\_\_

///ASK IF Q38=03///

Q40. 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
- 07 Other \_\_\_\_\_

///ASK IF Q36=01///

Q41. Recalling your experience with the notice, to what extent do you agree or disagree with the following statements.

|    |  | Strongly Agree<br>05  | Agree<br>04           | Neither Agree or Disagree<br>03 | Disagree<br>02        | Strongly Disagree<br>01 |
|----|--|-----------------------|-----------------------|---------------------------------|-----------------------|-------------------------|
| 1A | The language was easy to understand.                 | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>           | <input type="radio"/> | <input type="radio"/>   |
| 1B | The layout was easy to follow                        | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>           | <input type="radio"/> | <input type="radio"/>   |
| 1C | The section headings (if any) were helpful           | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>           | <input type="radio"/> | <input type="radio"/>   |
| 1D | The notice contained the information I needed        | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>           | <input type="radio"/> | <input type="radio"/>   |
| 1E | The notice contained too much information            | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>           | <input type="radio"/> | <input type="radio"/>   |
| 1F | The notice was clear on what action I needed to take | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>           | <input type="radio"/> | <input type="radio"/>   |
| 1G | The contact information was easy to locate           | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>           | <input type="radio"/> | <input type="radio"/>   |
| 1H | I feel confident in the calculations that I made     | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>           | <input type="radio"/> | <input type="radio"/>   |
| 1I | Other (Please specify)<br>_____                      | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>           | <input type="radio"/> | <input type="radio"/>   |

///ASK IF Q36=01///

Q42. Please indicate what you liked or didn't like about the notice

**OVERALL RATING**

///ASK IF Q1=01///

Q43. 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<br>05  | Satisfied<br>04       | Neither satisfied<br>nor dissatisfied<br>03 | Dissatisfied<br>02    | Very<br>Dissatisfied<br>01 |
| <input type="radio"/> | <input type="radio"/> | <input type="radio"/>                       | <input type="radio"/> | <input type="radio"/>      |

///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 Vendor, 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



**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**

**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 POST “FOR TECHNICAL ASSISTANCE, PLEASE CONTACT OUR HELP DESK BY VIA E-MAIL AT 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. Vendor, 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///**

### **Privacy and Security**

Vendor will not provide any identifying information to the IRS along with your responses and will hold your identity private to the extent permitted by law. Vendor will provide results to IRS in aggregate and 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 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 prepare the following federal tax forms in the most recent tax year?

|      |  | Frequentl<br>y | Sometime<br>s | Rarely | Never |
|------|--|----------------|---------------|--------|-------|
|      |  | 01             | 02            | 03     | 04    |
| Q3A. | Long form 1040   | 0              | 0             | 0      | 0     |
| Q3B. | Form 1040-ES   | 0              | 0             | 0      | 0     |
| Q3C. | Form 940   | 0              | 0             | 0      | 0     |
| Q3D. | Form 941   | 0              | 0             | 0      | 0     |
| Q3E. | Form 1065  | 0              | 0             | 0      | 0     |
| Q3F. | Form 1120  | 0              | 0             | 0      | 0     |
| Q3G. | Form 1120S   | 0              | 0             | 0      | 0     |
| Q3H. | Schedule A for itemized deductions                                   | 0              | 0             | 0      | 0     |
| Q3I. | Schedule B for interest and dividend income                          | 0              | 0             | 0      | 0     |
| Q3J. | Schedule C or C-EZ for small business income                         | 0              | 0             | 0      | 0     |
| Q3K. | Schedule D for capital gains or losses                               | 0              | 0             | 0      | 0     |
| Q3L. | Schedule E for supplemental income                                   | 0              | 0             | 0      | 0     |
| Q3M. | Schedule E for rental income, royalties and trusts                   | 0              | 0             | 0      | 0     |
| Q3N. | Schedule SE  | 0              | 0             | 0      | 0     |
| Q3O. | Schedule L for the standard deduction for certain filers             | 0              | 0             | 0      | 0     |
| Q3P. | Schedule M for Making Work Pay and Government Retiree Credits        | 0              | 0             | 0      | 0     |
| Q3Q. | Form 8863 for Education Credits (Hope and Lifetime Learning Credits) | 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<br>05 | Agree<br>04 | Neither Agree or Disagree<br>03 | Disagree<br>02 | Strongly Disagree<br>01 | Don't Know/<br>N/A<br>96 |
|------|--|----------------------|-------------|---------------------------------|----------------|-------------------------|--------------------------|
| Q4A. | It was easy to understand the tax forms.                                   | 0                    | 0           | 0                               | 0              | 0                       | 0                        |
| Q4B. | It was easy to understand the instructions for tax forms.                  | 0                    | 0           | 0                               | 0              | 0                       | 0                        |
| Q4C. | It was easy to go back and forth between the instructions and the tax form | 0                    | 0           | 0                               | 0              | 0                       | 0                        |
| Q4D. | It was easy to find answers in the publications.                           | 0                    | 0           | 0                               | 0              | 0                       | 0                        |
| Q4E. | The publication was as clear as possible, given the tax law                | 0                    | 0           | 0                               | 0              | 0                       | 0                        |
| Q4F. | It was easy to go back and forth between the publication and instructions  | 0                    | 0           | 0                               | 0              | 0                       | 0                        |
| Q4G. | The graphics and layout made it easy to follow                             | 0                    | 0           | 0                               | 0              | 0                       | 0                        |
| Q4H. | The size of the print made it easy to read                                 | 0                    | 0           | 0                               | 0              | 0                       | 0                        |
| Q4I. | The section headings were useful   | 0                    | 0           | 0                               | 0              | 0                       | 0                        |
| Q4J. | I feel confident in the calculations that I made                           | 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<br>05 | Good<br>04 | Neutral<br>03 | Poor<br>02 | Very Poor<br>01 | Don't Know/<br>N/A<br>96 |
|------|---|-----------------|------------|---------------|------------|-----------------|--------------------------|
| Q5A. | Long form 1040                              | 0               | 0          | 0             | 0          | 0               | 0                        |
| Q5B. | Form 1040-ES                                | 0               | 0          | 0             | 0          | 0               | 0                        |
| Q5C. | Form 940                                    | 0               | 0          | 0             | 0          | 0               | 0                        |
| Q5D. | Form 941                                    | 0               | 0          | 0             | 0          | 0               | 0                        |
| Q5E. | Form 1065                                   | 0               | 0          | 0             | 0          | 0               | 0                        |
| Q5F. | Form 1120                                   | 0               | 0          | 0             | 0          | 0               | 0                        |
| Q5G. | Form 1120S                                  | 0               | 0          | 0             | 0          | 0               | 0                        |
| Q5H. | Schedule A for itemized deductions          | 0               | 0          | 0             | 0          | 0               | 0                        |
| Q5I. | Schedule B for interest and dividend income | 0               | 0          | 0             | 0          | 0               | 0                        |

|      |   |   |   |   |   |   |   |
|------|---|---|---|---|---|---|---|
| Q5J. | Schedule C OR C-EZ for small business income                        | 0 | 0 | 0 | 0 | 0 | 0 |
| Q5K. | Schedule D for capital gains for losses                             | 0 | 0 | 0 | 0 | 0 | 0 |
| Q5L. | Schedule E for supplemental income                                  | 0 | 0 | 0 | 0 | 0 | 0 |
| Q5M. | Schedule E for rental income, royalties and trusts                  | 0 | 0 | 0 | 0 | 0 | 0 |
| Q5N. | Schedule SE   | 0 | 0 | 0 | 0 | 0 | 0 |
| Q5O. | Schedule L for the standard deduction for certain filers            | 0 | 0 | 0 | 0 | 0 | 0 |
| Q5P. | Schedule M for Making Work Pay and Government Retiree Credits       | 0 | 0 | 0 | 0 | 0 | 0 |
| Q5Q. | Form 8863 for Education Credits (Hope and Lifetime Learning Credits | 0 | 0 | 0 | 0 | 0 | 0 |

///PROGRAMMER: If all selections Q5A-Q5Q ≠ 1 or 2, Skip to Q7///

///PROGRAMMER: For any selection Q5A-Q5Q = 1 or 2, continue with Q6. Repeat up to a total of 3 times. If more than 3 selections in Q5A-Q5Q = 1 or 2, choose only 3 selections at random, then continue to Q7///

///ASK IF Q5A-Q5Q = 01 OR 02///

Q6. Please tell us how (Enter appropriate selection from Q5A-Q5Q) could be improved?

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## 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<br>05 | Good<br>04 | Neutral<br>03 | Poor<br>02 | Very Poor<br>01 | Didn't Use<br>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                |
| Q7I. | Tips              | 0               | 0          | 0             | 0          | 0               | 0                |

**PUBLICATIONS**

///ASK ALL///

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

|      |  | Frequentl<br>y<br>01 | Sometime<br>s<br>02 | Rarely<br>03 | Never<br>04 |
|------|--|----------------------|---------------------|--------------|-------------|
| Q8A. | Publication 17 - <i>Your Federal Income Tax ( for Individuals)</i>       | 0                    | 0                   | 0            | 0           |
| Q8B. | Pub 463 - <i>Travel, Entertainment, Gift and Car Expenses</i>            | 0                    | 0                   | 0            | 0           |
| Q8C. | Pub 501 - <i>Exemptions, Standard Deductions and Filing Instructions</i> | 0                    | 0                   | 0            | 0           |
| Q8D. | Pub 502 - <i>Medical and Dental Expenses</i>                             | 0                    | 0                   | 0            | 0           |
| Q8E. | Pub 505 - <i>Tax Withholding and Estimated Tax</i>                       | 0                    | 0                   | 0            | 0           |
| Q8F. | Pub 523 - <i>Selling Your Home</i>                                       | 0                    | 0                   | 0            | 0           |
| Q8G. | Pub 525 - <i>Taxable and Nontaxable Income</i>                           | 0                    | 0                   | 0            | 0           |
| Q8H. | Pub 535 - <i>Business Expenses</i>                                       | 0                    | 0                   | 0            | 0           |
| Q8I. | Pub 550 - <i>Investment Income and Expenses</i>                          | 0                    | 0                   | 0            | 0           |
| Q8J. | Pub 590 - <i>Individual Retirement Arrangements (IRAs)</i>               | 0                    | 0                   | 0            | 0           |
| Q8K. | Pub 596 - <i>Earned Income Credit</i>                                    | 0                    | 0                   | 0            | 0           |
| Q8L. | Pub 946 - <i>How to Depreciate Property</i>                              | 0                    | 0                   | 0            | 0           |
| Q8M. | Pub 970 - <i>Tax Benefits for Education</i>                              | 0                    | 0                   | 0            | 0           |
| Q8N. | Another Publication (Please Specify)                                     | 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 the publication(s) you used in 2009?

|      |                   | Very Good<br>05 | 04 | 03 | 02 | Very<br>Poor<br>01 | Don't<br>Know/<br>N/A<br>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 your overall satisfaction, how would you rate each of the following publications? If you have never used the publication, please mark Not Applicable (N/A).

|      |  | Very Good<br>05 | Good<br>04 | Neutral<br>03 | Poor<br>02 | Very<br>Poor<br>01 | Don't<br>Know/<br>N/A<br>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                           |
| Q10N | 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?

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**MARKETING**

///ASK ALL///

Q12. 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<br>05 | Satisfied<br>04 | Neither satisfied<br>nor dissatisfied<br>03 | Dissatisfied<br>02 | Very<br>Dissatisfied<br>01 |
|----------------------|-----------------|---|--------------------|----------------------------|
| 0                    | 0               | 0   | 0                  | 0                          |

///ASK ALL///

Q13. How satisfied are you that you know about changes which have occurred in **publications** that you needed to use for the 2009 filing season?

| Very Satisfied<br>05 | Satisfied<br>04 | Neither satisfied<br>nor dissatisfied<br>03 | Dissatisfied<br>02 | Very<br>Dissatisfied<br>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 Taxpayer Assistance Centers (TAC) and/or Volunteer Income tax Assistance
- 03 IRS Tax Forums
- 04 Professional Association
- 05 Word of Mouth
- 06 Software Programs
- 07 TV, Radio or Print Advertisements
- 95 Other, Please Specify
- 97 Not Sure

///ASK ALL///

Q15. Are you aware that the IRS electronic tax publications are available in both pdf and html format?

- 01 Yes
- 02 No

///ASK ALL///

Q16. 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

02 No

///ASK IF Q16=01///

Q17. Have you used the linking feature in any electronic tax publications?

- 01 Yes
- 02 No

///ASK IF Q17=01///

Q18. If yes, please list the electronic tax publications in which you have used the linking feature.

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///ASK IF Q16=01///

Q19. Has the linking feature in tax publications been beneficial for you?

- 01 Yes
- 02 No

///ASK IF Q19=01///

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

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///ASK IF Q19=02///

Q21. What makes the linking feature not beneficial for you?

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///ASK IF Q16=01///

Q22. How can we improve the linking feature in tax publications?

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**RECEIPT AND TOPIC OF NOTICE**

///ASK ALL///

Q23. In the past 12 months, have any of your clients received a notice from the IRS?

- 01 Yes
- 02 No

**NOTICE RESOLUTION**

///ASK IF Q23=01///

Q24. Who handled your client's notice?

- 01 I, or someone in my office, handled the notice for my client
- 02 My client handled it or had someone else handle it

- 03 Don't remember
- 04 Other \_\_\_\_\_

///ASK IF Q24=01///

Q25. How do you typically choose to handle IRS notices received by your clients?

- 01 Call the IRS Toll-free number
- 02 Visit the local IRS office
- 03 Send regular mail to the IRS
- 04 Send email to the IRS
- 05 Other \_\_\_\_\_
- 06 Don't remember
- 04 Not applicable

///ASK IF Q24=01///

Q26. Recalling your experience with IRS notices, please indicate the level to which you agree or disagree with the following statements:

|      |  | Strongly Agree<br>05  | Agree<br>04           | Neither Agree or Disagree<br>03 | Disagree<br>02        | Strongly Disagree<br>01 | Don't Know/<br>N/A<br>96 |
|------|--|-----------------------|-----------------------|---------------------------------|-----------------------|-------------------------|--------------------------|
| Q26A | The language was easy to understand                    | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>           | <input type="radio"/> | <input type="radio"/>   | <input type="radio"/>    |
| Q26B | The layout was easy to follow                          | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>           | <input type="radio"/> | <input type="radio"/>   | <input type="radio"/>    |
| Q26C | The section headings (if any) were helpful             | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>           | <input type="radio"/> | <input type="radio"/>   | <input type="radio"/>    |
| Q26D | The notice contained too much information              | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>           | <input type="radio"/> | <input type="radio"/>   | <input type="radio"/>    |
| Q26E | The notice contained the information I needed          | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>           | <input type="radio"/> | <input type="radio"/>   | <input type="radio"/>    |
| Q26F | The notice was clear on what action needed to be taken | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>           | <input type="radio"/> | <input type="radio"/>   | <input type="radio"/>    |
| Q26G | The contact information was easy to locate             | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>           | <input type="radio"/> | <input type="radio"/>   | <input type="radio"/>    |
| Q26H | Other<br>_____   | <input type="radio"/> | <input type="radio"/> | <input type="radio"/>           | <input type="radio"/> | <input type="radio"/>   | <input type="radio"/>    |

///ASK IF Q24=01///

Q27. Please indicate what you liked or didn't like about the notice

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**OVERALL RATING**

///ASK ALL///

Q28. 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<br>05 | Satisfied<br>04 | Neither satisfied<br>nor dissatisfied<br>03 | Dissatisfied<br>02 | Very<br>Dissatisfied<br>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 Vendor, 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

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

**2011 Forms Distribution Survey  
DRAFT Web version**

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

**April 1, 2010**

**CUSTOMER CLASSIFICATION**

**///PROGRAMMER: PLEASE POST THE FOLLOWING AT THE BOTTOM OF EACH SCREEN:**

If you have any questions about this survey, please contact the survey processing center at Vendor or at [irs.](http://irs.)

**Web Introduction**

Welcome to the Internal Revenue Service (IRS) customer satisfaction survey! Vendor, 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 partners who redistribute IRS products to the public. Your participation is very important to help the IRS design products and services that meet the needs of taxpayers.

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.

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

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

**Anonymity and Security**

Vendor will not provide any identifying information to the IRS along with your responses and will keep your identity private to the extent permitted by law. Your responses will be reported to the IRS only in aggregate with the responses from other forms distributors. 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. 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.

**CUSTOMER CLASSIFICATION**

///ASK ALL///

Q1. What is your primary relationship to the IRS? Are you .... ? *Please check only one*

- 01 Tax Forms Outlet Program (TFOP)
- 02 Community Based Outlet Program (CBOP)
- 03 International Program (INTL)
- 95 Other Please specify \_\_\_\_\_
- 97 Don't know

///ASK ALL///

Q2. In what type of business or government agency do you work? *Please check only one*

- 01 Credit union
- 02 Copy center
- 03 Grocery
- 04 Library
- 05 Pharmacy
- 06 Post office
- 07 City/County government offices
- 08 Military installation
- 09 Prison
- 10 Federal government
- 11 Department of State
- 12 Embassy/Consulate
- 13 Other. Please specify \_\_\_\_\_

//ASK IF Q2=13//

Q2\_13 \_\_\_\_\_

**TAX PRODUCT ORDERING AND FULFILLMENT**

///ASK ALL///

Q3. During the current tax year, about how many people obtained federal tax products from your location?

- 01 None
  - 02 1-250
  - 03 251-500
  - 04 More than 500
- [Terminate survey] Thank you**

///ASK IF Q3=02,03,04///

Q4. 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.*

- 01 E-Order (E-mail)
- 02 Telephone
- 03 Mail Order form/quantity survey
- 04 Other. Please specify \_\_\_\_\_

///ASK IF Q4=01///

Q5. How would you rate your experience with ordering your federal tax products by E-Order (E-mail) and e-mail confirmation

- 05 Very easy
- 04 Easy
- 03 Neither Easy nor Difficult
- 02 Difficult
- 01 Very difficult

///ASK IF Q5=01,02///

Q6. What made it difficult?

///ASK IF Q4=02///

Q7. How would you rate your experience with ordering your federal tax products by telephone?

- 05 Very easy
- 04 Easy
- 03 Neither Easy nor Difficult
- 02 Difficult
- 01 Very difficult

///ASK IF Q7=01,02///

Q8. What made it difficult?

///ASK IF Q4=03///

Q9. How would you rate your experience with ordering your federal tax products by mail order form?

- 05 Very easy
- 04 Easy
- 03 Neither Easy nor Difficult
- 02 Difficult
- 01 Very difficult

///ASK IF Q9=01,02///

Q10. What made it difficult?

///ASK IF Q3=02,03,04///

Q11. How would you rate your experience with obtaining prior year forms, instructions, and publications?

- 05 Very easy

- 04 Easy
- 03 Neither Easy nor Difficult
- 02 Difficult
- 01 Very difficult
- 96 Don't require

*///ASK IF Q11=01,02///*

Q12. What made it difficult?

---

---

*///ASK IF Q3=02,03,04///*

Q13. Did you use reproducibles (federal tax products that you can copy) during the current tax year?,

- 01 Yes
- 02 No
- 03 Not aware of this product

*///ASK IF Q13=01, 02, ///*

Q13A. How valuable a resource are reproducibles to you in your role as a forms distributor?

- 05 Very valuable
- 04 Valuable [
- 03 Neutral
- 02 Of little value
- 01 Not at all valuable

*///ASK IF Q13A=01,02///*

Q14. What makes reproducibles not valuable to you?

---

---

*///ASK IF Q13=03///*

Q15. If you are not familiar with the reproducible products would you be interested in learning how you could benefit from this program.

- 01 Yes
- 02 No

*///ASK IF Q3=02,03,04///*

Q16. Did you receive all, some, or none of the current federal tax year products that you ordered?

- 01 All
- 02 Some
- 03 None

*///ASK IF Q16=02,03///*

Q17. Please list the products that you did not receive.

---

---



///ASK IF Q16=01,02///

Q18. Did the tax products you ordered arrive in a timeframe that met your program needs?

- 01 Always
- 02 Some of the time
- 03 Never

///ASK IF Q18=02,03///

Q19. Which federal tax products were not received within the timeframe to meet your program needs?

---

---

///ASK IF Q18=02,03///

Q20. On average, how much later than the time you needed to receive them were those products received?

- 01 1 week
- 02 2 weeks
- 03 3 weeks
- 04 1 month
- 05 More than a month

///ASK IF Q18=02,03///

Q21. Were you informed in advance that your products would not be received within a timeframe that met your program needs?

- 01 Yes
- 02 No

///ASK IF Q18=02,03/// []

Q22. How would you rate your experience with receiving communications from the IRS explaining the status of your order?

- 05 Very satisfied
- 04 Satisfied
- 03 Neither satisfied nor dissatisfied
- 02 Dissatisfied
- 01 Very dissatisfied
- 96 Did not receive communications from the IRS

///ASK IF Q16=03 orQ18=02,03///

Q23. 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?

*//mul=06 but cannot include response 06 in the mul//*

Please check all that apply.

- 01 Checked the IRS programs, including website, for product availability or delays
- 02 Downloaded product(s) from the web
- 03 Called or e-mailed the Tax Forms Outlet Program (TFOP)
- 04 Called the Community Based Outlet Program (CBOP)
- 05 Called or e-mailed the International Program (INTL)

- 06 Took no action
- 07 Other. Please specify \_\_\_\_\_

*///ASK IF Q16=03 or Q18=02,03 AND Q23 NOT =06 or 88///*

- Q24. How easy was it for you to reach the IRS about your late or missing product(s)?
- 05 Very easy
  - 04 Easy
  - 03 Neither Easy nor Difficult
  - 02 Difficult
  - 01 Very difficult

*///ASK IF Q24=01,02///*

- Q25. What did you find difficult about reaching the IRS concerning your late or missing product(s)?
- \_\_\_\_\_
- \_\_\_\_\_

*///ASK IF Q16=03 or Q18=02, 03///*

- Q26 How satisfied were you with how the IRS resolved issues with the product(s) that were delivered late or not at all?
- 05 Very satisfied
  - 04 Satisfied
  - 03 Neither Satisfied nor Dissatisfied
  - 02 Dissatisfied
  - 01 Very dissatisfied

*///ASK IF Q18=02,03///*

- Q27. What is the best method for the IRS to get updated information to you?
- 01 Internet
  - 02 E-Mail
  - 03 Mail
  - 04 Other. Please specify \_\_\_\_\_

*///ASK IF Q16=01,02///*

- Q28. Did you receive your order in multiple shipments?
- 01 Yes
  - 02 No
  - 03 Don't know

*///ASK IF Q28=01///*

- Q29. Did receiving multiple shipments present any challenges or difficulties for you?
- 01 Yes
  - 02 No

*///ASK IF Q29=01///*

- Q30. Please describe the challenges you encountered in receiving your order in multiple shipments.
- \_\_\_\_\_
- \_\_\_\_\_

///ASK IF Q28= 02, 03///

- Q31. If possible would you like to receive your products in multiple shipments?  
01 Yes  
02 No

///ASK IF Q16=01,02///

- Q32. Did you receive the most current federal tax products you ordered in good usable condition?  
01 Yes  
02 No

///ASK IF Q32=02///

- Q33. Which federal tax products were not received in a usable condition?
- 
- 

///ASK IF Q32=02///

- Q34. 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.*

//mul=06 but cannot include response 06 in the mul//

- 01 Called the IRS  
1 Downloaded product from the web  
2 Called or e-mailed the Tax Forms Outlet Program (TFOP)  
3 Called the Community Based Outlet Program (CBOP)  
4 Called or e-mailed the International Program (INTL)  
5 Did nothing  
07 Other. Please specify \_\_\_\_\_

///ASK IF Q34=01,03,04,05///

- Q35. How would you describe your experience with reaching the IRS (CBOP/TFOP/International Program) about your unusable product?  
05 Very easy  
04 Easy  
03 Neither Easy nor Difficult  
02 Difficult  
01 Very difficult

///ASK IF Q35=01,02///

- Q36. What was difficult about reaching the IRS about tax products that were not usable?
- 
- 

///ASK IF Q3=02,03,04///

- Q37. Overall, how would you rate your satisfaction with the IRS order and delivery process for federal tax products and services?  
05 Very satisfied  
04 Satisfied  
03 Neither Satisfied nor Dissatisfied

- 02 Dissatisfied
- 01 Very dissatisfied

///ASK IF Q37=01,02///

Q38. What were the reason(s) for your dissatisfaction with the IRS order and delivery process for federal tax products and services?

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///ASK IF Q3=02,03,04///

Q39. 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 customers?

- 01 Yes
- 02 No

///ASK IF Q3=02,03,04///

Q40. In your opinion, what would be the most important improvements that the IRS could make in its tax product ordering, delivery and communications processes for distribution?

---

---

//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 Vendor, 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 Vendor or at

*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.*

**Example  
Pre-Notification Letter  
(Business Taxpayers)**

[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. Contractor, an independent research company, is administering the survey and will keep your individual identity anonymous. Contractor 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,

Director, Research and Analysis  
Wage and Investment Division

**Example  
Cover Letter – First Survey  
(Business Taxpayers) Survey Processing Center**

P.O. Box 344  
Claysburg, PA 16625 USA

[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 Craig Johnson, Acting Director, Research and Analysis, 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 returns.

You were chosen at random from a list of businesses. Contractor, 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, please go to the following weblink:

[www.businesssurvey.com](http://www.businesssurvey.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 NPC: Password will be generated from sample for each survey recipient.]

You can access the survey from any computer that has Internet access by clicking on the above Internet address or by copying the Internet address into your browser. The web address above includes a 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. Contractor will not share these passwords with the IRS at any time during or after this study.

Contractor 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 20 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,  
Project Director

**Example  
Reminder Postcard  
(Business Taxpayers)**

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' taxes.

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.business2008survey.com](http://www.business2008survey.com)).

Project Director

**Example  
Cover Letter – Second Survey  
(Business Taxpayers)**

**Survey Processing Center**

P.O. Box 344  
Claysburg, PA 16625 USA

[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. Contractor, an independent research company, is administering the survey. If you choose to complete it online, please go to the following weblink:

[www.business2008survey.com](http://www.business2008survey.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 NPC: Password will be generated from sample for each survey recipient.]

The password will protect any data you have entered if you experience any computer disruptions. Contractor will not share these passwords with the IRS at any time during or after this study.

Contractor 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, Project Director