OMB #1545-1432

Individual Taxpayer Survey
March 2012
- Questionnaire -

Customer Satisfaction Survey for External Customers of Media and Publications Division

2012 Individual Taxpayer Survey

KN Web Programming

Internal Revenue Service
Tax Forms and Publications Division

SCREENER INTRODUCTION
[DISPLAY]
INTRO.

Fors Marsh Group LLC is an independent research organization working with the IRS to obtain feedback on customer satisfaction. If you are an adult who deals with your household taxes, 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 survey should take no more than 15 minutes for most customers. Fors Marsh Group 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.

If you wish to verify the IRS's sponsorship of the survey, please visit the IRS website at: http://www.irs.gov/formspubs/article/0,,id=221121,00.html.

If you would like to speak with someone at IRS to verify the study please contact Patty Wagner at patty.wagner@irs.gov or (202) 283-0188.

INDIVIDUAL TAXPAYER – Screener Questions

[SP]
PROMPT ONCE

S.Q1.Have you filed a FEDERAL INCOME TAX RETURN for 2010?Yes.
You or your spouse have filed a federal tax return for 2010.............................1
No. Have not yet filed a federal income tax return for 2010............................2
....
No. Do not have to file a federal income tax return for 2010...........................3

TERMINATE IF SQ1=2 OR 3 OR REFUSED.

[SP]
PROMPT ONCE

S.Q2. Who prepared your 2010 federal income tax return?

You or another family member in your household...1
A paid preparer, like an accountant or tax service, or a volunteer....................2
Someone else outside your household...3
I don't know/remember...97

TERMINATE IF SQ2=2 OR 3 OR 97 OR REFUSED.

[SP]
PROMPT ONCE

S.Q4. Are you familiar enough with your federal income tax return for 2010 to answer some questions about it?

Yes..1
No..2
I don't know/remember...97
....
....
....
....

TERMINATE IF SQ4= 2 OR 97 OR REFUSED.

Tax Package Questions (this section was moved here from the end of the survey)

[SP]
Q46. Prior to tax year 2010, did you receive a tax package in the mail containing IRS forms and instructions?

Yes..........1
No..........2
I don't know/remember..........97

[ASK IF Q46 = 1 'YES']
[SP]
Q47. How did you get the tax forms and instructions you needed for tax year 2010 now that the tax package is not mailed to you?

Library..........1
Local IRS Office..........2
Online at irs.gov..........3
Tax Preparer..........4
Call and ordered..........5
Other. Please specify:_______________ 6

INDIVIDUAL TAXPAYER – Main Survey Questions

[SP]
Q7A. How did you prepare your 2010 federal income tax return?

By hand, using the IRS tax form..........1
Using tax preparation software..........2
I don't know/remember..........97

[ASK IF Q7A = 2 'USING TAX PREPARATION SOFTWARE']
[SP]
Q7B. Which of the following best describes the software you used?

Online commercial software..........1
Commercial software installed on PC..........2
Commercial software installed on a Mac..........3
Free File (online software with no fee accessed from irs.gov)..........4
Free File using Free File Fillable Forms accessed from the www.irs.gov/freefile page..........5
Downloaded or accessed IRS forms (from www.irs.gov/formspubs), printed, and completed by hand...........6
Downloaded IRS forms, filled them in electronically, saved, and printed them..........7
Other. Please describe
____..........8

Q7C. Did you view any IRS tax forms online?

Yes	1
No	2

[ASK IF Q7A = 2 'USING TAX PREPARATION SOFTWARE' AND Q7C=1'YES']
[SP]
Q7D.

Please indicate which of the following best describes how you viewed actual IRS tax forms while using tax preparation software.

I looked at the actual IRS form when determining what to enter as input to my software program..........1
The first time I saw the actual form was after I was finished and printed or viewed my completed return online..........2
I never looked at a hard copy or PDF of the IRS form. I relied completely on the software interface to complete and submit my return. 3
Other. Please describe when and how you used the IRS form:
______________________________..........4

[SP]
Q8. After your forms were completed, how did you file your most recent tax return?

I filed by regular mail..........1
I filed electronically by computer..........2
I delivered in person..........4
I don't know/remember..........97

[SP]
PROMPT ONCE IF REFUSED
Q5. Which of the following federal tax forms did you use when you filed your 2010 tax return?

1040EZ Income Tax Return for Single Filers and Joint Filers with No Dependents..........1

1040A US Individual Income Tax Return..2
....Skip to (
1040 US Individual Tax Return..3
I don't know/remember..97
....

Insert instruction: Note: if you click on the [?], a picture of the document will be shown.

[Programmer Note: **Next to each of these response options, please display a small "?" hyperlink icon. When clicked, this should provided the respondent with a short description of what each form is, who typically files this form; etc. Ideally, we would also like this to include a small picture of the actual form. The goal is to have a short description to help them distinguish between the forms and jog their memory in case they don't immediately recall which one they filed. Please obtain information for these descriptions at: http://www.irs.gov/taxtopics/tc352.html]**

FORMS EVALUATION

[ASK IF Q5=3 '1040 US INDIVIDUAL TAX RETURN ']

[GRIDS, SP]

REPEAT RESPONSE OPTION HEADINGS AFTER STATEMENT 6

PROMPT ONCE IF REFUSED

Q6. Which of the following schedules or forms, if any, did you file with your Form 1040?

	Used form/schedule	Did not use form/schedule	I don't know/remember
[DO NOT SHOW NUMBER LABELS]	1	2	97

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. Form 4562 Deprecations and Amortization
I. Form 6251 Alternative Minimum Tax (Individual)
J. Form 5405 for the First-Time Homebuyer Credit
K. Form 8863 for Education Credits (American Opportunity and Lifetime Learning Credits)

***[Programmer Note*: Please set this up as a grid format so that all schedules are shown simultaneously in a table with multiple rows and response options are in the adjacent columns. Also, similarly to Q5 above, next to each of these response options, please display a small "?" hyperlink icon. When clicked, this should provided the respondent with a small picture of the actual form. The goal is to have a short description to help them distinguish between the forms and jog their memory in case they don't immediately recall which one they filed. Please obtain information for these descriptions at: http://www.irs.gov/formspubs/index.html following the instruction link next to each schedule]**

[ASK IF Q5=3 '1040 US INDIVIDUAL TAX RETURN ']
[SP]

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

- Schedule A for itemized deductions
- Schedule B for interest and dividend income
- Schedule C for small business income
- Schedule D for capital gains and losses
- Schedule E for supplemental income
- Schedule F for farm income
- Schedule EIC for Earned Income Credit
- Form 4562 Deprecations and Amortization
- Form 6251 Alternative Minimum Tax (Individual)
- Form 5405 for the First-Time Homebuyer Credit
- Form 8863 for Education Credits (American Opportunity and Lifetime Learning Credits)

Yes. Please specify_______ 1
No 2
I don't know/remember 97

[ASK FOR ANY Q6=1 ITEMS; IF NO Q6 ITEMS ARE EQUAL 1, SKIP]
[GRIDS, SP]

Q6C. Please rate your satisfaction with each of the following schedules and forms that you used.

	Very dissatisfied	Dissatisfied	Neither satisfied nor dissatisfied	Satisfied	Very satisfied	Not applicable/ Have not used/ No experience
[DO NOT SHOW NUMBER LABELS]	1	2	3	4	5	96

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. Form 4562 Deprecations and Amortization
I. Form 6251 Alternative Minimum Tax (Individual)
J. Form 5405 for the First-Time Homebuyer Credit
K. Form 8863 for Education Credits (American Opportunity and Lifetime Learning Credits)

[GRIDS, SP]
REPEAT RESPONSE OPTION HEADINGS AFTER STATEMENT 4

Q9.
Thinking about the tax forms, publications, and instructions that you used for Tax Year 2010, please rate your satisfaction with the following

	Very dissatisfied	Dissatisfied	Neither satisfied nor dissatisfied	Satisfied	Very satisfied	Not applicable/ Have not used/ No experience
[DO NOT SHOW NUMBER LABELS]	1	2	3	4	5	96

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

PUBLICATION EVALUATION

[DISPLAY]
Q10_INTRO.
For the following set of questions, please think about your use of tax publications as an individual taxpayer for your 2010 federal tax return.

[Programmer: please highlight the words 'tax publications' in the instructions that when clicked provides the following definition: 'Tax publications are any *official IRS documents* that provide tax guidance and information on specific topics, situations, or common issues. Some of the most common publications include: {show list of pubs in Q11}"]

[SP]
PROMPT ONCE IF REFUSED
Q10. Did you use any IRS publications in preparing your 2010 federal tax return?

Yes....................1
No....................2 Skip to Q22
I don't know/remember....................97

[ASK IF Q10=1]
[GRIDS, SP; PROMPT ONCE IF RESPONSE N EQUALS 1 AND NOTHING ENTERED IN TEXT BOX]
REPEAT RESPONSE OPTION HEADINGS AFTER STATEMENT 7
PROMPT ONCE IF REFUSED

Q11. Which of the following IRS publications have you used in preparing your 2010 federal tax return?

	Used publication	Did not use	Don't know
[DO NOT SHOW NUMBER LABELS]	1	2	97

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? (Please specify) **_______**

***[Programmer Note*: Please set this up as a grid format so that all publications are shown simultaneously in a table with multiple rows and response options are in the adjacent columns. Also, similarly to Q5 above, next to each of these response options, please display a small "?" hyperlink icon. When clicked, this should provided the respondent with a short description of what each publication is. Ideally, we would also like this to include a small picture of the actual form. Please obtain information for these descriptions at: http://www.irs.gov/publications/]**

[ASK ONLY IF Q11A = 1 'PUB 17 YOUR FEDERAL INCOME TAX']
[GRIDS, SP]
REPEAT RESPONSE OPTION HEADINGS AFTER STATEMENT 3

Q11B. Please indicate how frequently you used the following sections in Publication 17, Your Federal Income Tax, during this year.

	Never	Rarely (Once or twice during the filing season)	Occasionally (Once or twice a month)	Frequently (Once a week)	Very Frequently (More than once a week)	Not applicable/Have not used/No experience	Unaware product/service was available
[DO NOT SHOW NUMBER LABELS]	1	2	3	4	5	6	7

A. The Income Tax Return – including filing status, personal exemptions and dependents
B. Income – including wages, tips, dividends pensions and social security income, etc.
C. Gains and Losses - including basis of property, selling your home, gains and losses, etc.
D. Adjustments to Income - including alimony, IRAs and education-related adjustments
E. Standard Deduction and Itemized Deductions - including medical care, interest deductions and taxes, etc.
F. Figuring Your Taxes and Credits - including child and dependent care expenses, earned income credit, education credits, etc.)
G. Tax Tables and Tax Rate Schedule

-IF MORE THAN 2 PUBLICATIONS IN Q11A HAVE BEEN USED (01 RESPONSE), RANDOMLY SELECT 2 OF THE PUBLICATIONS THE RESPONDENT USED AND ASK QUESTIONS Q13 – Q20. CONTINUE WITH Q21 AFTER QUESTIONS ON SECOND PUBLICATION ARE COMPLETE.

-IF 2 PUBLICATIONS IN Q11A HAVE BEEN USED (01 RESPONSE), SELECT BOTH PUBLICATIONS THE RESPONDENT USED AND ASK QUESTIONS Q13 – Q20. CONTINUE WITH Q21 AFTER QUESTIONS ON SECOND PUBLICATION ARE COMPLETE.

IF RESPONSE N (DID YOU USE SOMETHING ELSE?) SELECTED AND NOTHING ENTERED IN TEXT BOX, SHOW "THE OTHER PUBLICATION YOU USED" AS THE DYNAMIC TEXT BELOW.

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

-CREATE DATA-ONLY VARIABLES PABLICATION1 AND PUBLICATION2 FOR PUBLICATIONS TO BE INSERTED IN QUESTIONS Q13-Q21.

-IF ALL Q11A_A-N=02, 97 OR REFUSED, SKIP TO Q21

Please include the link for picture of the publication that is being piped into these loop questions.

[SP]

Q13_loop. How did you find out about **[PUBLICATION1/2]**?

Form 1040 or other schedules referred me to it....1
List of publications on IRS website....2
From doing taxes in previous years....3
From other tax guides....4
From my tax preparer....5
Word of mouth....6
From tax preparation software....7
Other (please specify) ______....95
I don't know/remember....97

[SP]

Q14_loop. How easy was it for you to obtain **[PUBLICATION1/2]**?

Very difficult....1
Difficult....2
Neither easy nor difficult....3
Easy....4
Very easy....5
Not applicable/Have not used/No experience 96
I don't know/remember....97

………………………………………………………………………………………………………
………………………………………………………………………………………………………
…………………………………………………………………………………………………

[ASK IF Q14_LOOP=2 OR 1]
[MEDIUM TEXTBOX]
PreQ15_loop. What was difficult about obtaining **[PUBLICATION1/2]**?

____
Don’t know **[SP]**

CREATE DATA-ONLY VARIABLE(S)
IF TYPED ANSWER IN Q15_LOOP, DATA-ONLY VARIABLE(S) =1 ‘GAVE ANSWER’
IF Q15_LOOP=DON’T KNOW CHECKBOX, DATA-ONLY VARIABLE(S) =97 ‘DON’T KNOW’
IF Q15_LOOP=REFUSED, DATA-ONLY VARIABLE(S) = 99 ‘REFUSED’

[GRIDS, SP]
Q16_loop. How would you rate the following aspects of **[PUBLICATION1/2]**?

	Very Poor	Poor	Neutral	Good	Very Good	Not applicable/Have not used/No experience	I don’t know /remember
[DO NOT SHOW NUMBER LABELS]	1	2	3	4	5	96	97

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

[GRIDS, SP]
REPEAT RESPONSE OPTION HEADINGS AFTER STATEMENT 3
Q17_loop. Do you agree or disagree with the following statements about your experience with the most recent version of **[PUBLICATION1/2]**:

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree	Not applicable/Have not used/No experience	I don't know/remember
[DO NOT SHOW NUMBER LABELS]	1	2	3	4	5	96	97

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

[SP]
Q18_loop. How would you rate your overall satisfaction with **[PUBLICATION1/2]** the last time you used it?

Very dissatisfied..........1
....
....
....
....
....
....
Dissatisfied..........2

....
....
....
Neither satisfied nor dissatisfied..3
Satisfied..4
Very satisfied..5
Not applicable/Have not used/No experience..96

[ASK IF Q18_LOOP=5, 4]
[MEDIUM TEXTBOX]
PREQ19_loop. What would you describe as the BEST features of **[PUBLICATION1/2]**?

____

[ASK IF Q18_LOOP=1, 2]
[MEDIUM TEXTBOX]
PREQ20_loop. How could **[PUBLICATION1/2]** be improved?

____

[ASK IF Q10=01 OR ANY Q11A-N=01]
[MP]
Q21. Where did you get **[IF Q10=1 AND NONE OF ANSWERS IN Q11 ARE EQUAL 1, INSERT THE WORD "the** publications**". IF ANY OF Q11 STATEMENTS ARE EQUAL 1, INSERT LIST OF PUBLICATIONS FROM Q11A-N=1; IF 2 PUBLICATIONS ARE INSERTED HERE, SEPARATE THEM WITH "AND"; IF MORE THAN 2 PUBLICATIONS ARE INSERTED HERE, SEPARATE THEM WITH COMMAS, AND "AND" BEFORE THE LAST PUBLICATION NAME]** that you used for your 2010 federal income tax return? If you obtained these publications from different sources, please tell us all the sources.

IRS office..1
IRS website...2
Volunteer Income Tax Assistance (VITA) or Tax Counseling for the
Elderly (TCE) site..3
Tax preparer/accountant...4
Through the mail...5
Tax preparation software or computer program...6
Library..7
Post office..8
Other (please specify) ___________...95

WEBSITE AND ELECTRONIC FORMS EVALUATION

[SP]

PROMPT ONCE IF REFUSED

Q24. Approximately how many times have you accessed the IRS website to get forms, instructions or publications in the last year?

Never..1
Once...2
2 -5 times...3
6 -10 times...4
More than 10 times...5

[ASK IF Q24 IS > 1 'NEVER']
[GRIDS, SP]

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

	YES	NO	I don't know/remember
[DO NOT SHOW NUMBER LABELS]	1	2	97

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? ________

[ASK IF Q24 > 1 'NEVER' AND ANY Q25A-J=01 'YES']
[SP]

Q32. How would you rate your overall satisfaction with getting tax forms, publications and instructions from the IRS website?

Very dissatisfied...1
....
....
....
....
Dissatisfied...2
....
Neither satisfied nor dissatisfied..3
Satisfied..4
Very satisfied..5

Not applicable/Have not used/No experience..96
....
99 REFUSED [DO NOT SHOW]

ELECTRONIC DOCUMENTS

[SP]
Q33. Have you ever completed or used the electronic version of any federal tax form on the IRS website?

Yes...1
No..2
I don't know/remember...97

[ASK IF Q33=1]
[SP]
PREQ34. Which of the following tax forms have you completed or used:

1040EZ Income Tax Return for Single Filers and Joint Filers with No Dependents 1
1040A US Individual Income Tax Return 2
1040 US Individual Tax Return..3
I don't know/remember...97
....
....
....

[SP]
Q35. Have you ever used the electronic version of any federal tax publication on the IRS website?

Yes...1
No..2
I don't know/ remember..97

[ASK IF Q35=01]
[MP]
PREQ36. Please mark all of the electronic publications you have used.

Pub 17 Your Federal Income Tax...1
Pub 463 Travel, Entertainment, Gift and Car Expenses..................................2
Pub 501 Exemptions, Standard Deductions and Filing Instructions.................3
Pub 502 Medical and Dental Expenses..4
Pub 505 Tax Withholding and Estimated Tax..5
Pub 523 Selling Your Home..6
Pub 525 Taxable and Nontaxable Income..7

Pub 535 Business Expenses....8
Pub 550 Investment Income and Expenses....9
Pub 590 Individual Retirement Arrangements (IRAs)....10
Pub 596 Earned Income Credit....11
Pub 946 How To Depreciate Property....12
Pub 970 Tax Benefits for Education....13
Other (please specify) ______....95

[Programmer: Please provide same '?' information icons described in Q11]

[ASK IF Q35=01 AND MORE THAN ONE OF PREQ36 ITEMS EQUAL 1.
ONLY SHOW PREQ36=1 ITEMS]
[SP]

Q36A. Of the following electronic IRS publications you indicated that you have used, please choose the one publication you are most familiar with:

Pub 17 Your Federal Income Tax 1
Pub 463 Travel, Entertainment, Gift and Car Expenses....2
Pub 501 Exemptions, Standard Deductions and Filing Instructions....3
Pub 502 Medical and Dental Expenses....4
Pub 505 Tax Withholding and Estimated Tax....5
Pub 523 Selling Your Home....6
Pub 525 Taxable and Nontaxable Income....7
Pub 535 Business Expenses....8
Pub 550 Investment Income and Expenses....9
Pub 590 Individual Retirement Arrangements (IRAs)....10
Pub 596 Earned Income Credit....11
Pub 946 How To Depreciate Property....12
Pub 970 Tax Benefits for Education....13
[ANSWER FROM PREQ36 OTHER TEXTBOX, IF PROVIDED OR "other publication**" IF PREQ36 OTHER SELECTED BUT NO TYPED RESPONSE PROVIDED]**....95

[Programmer: Please only show options that were marked inPREQ36. Please only allow respondent to choose one answer. Please insert the chosen publication name into the question stem of Q37-Q39]

CREATE DATA-ONLY VARIABLE PUPLICATION3.

IF ONLY 1 ANSWER IS EQUAL 1 IN PREQ36, PUBLICATION3=PREQ36 PUBLICATION NAME

IF MORE THAN 1 ANSWER IS EQUAL 1 IN PREQ36 AND Q36A IS NOT REFUSED, PUBLICATION3=Q36A ANSWER.

IF OTHER PUBLICATION IS CHOSEN (ONLY 1 ANSWER IN PREQ36 AND IT IS EQUAL OTHER OR Q36A=OTHER) AND NOTHING WAS PROVIDED IN TEXTBOX, PLEASE USE "publication**"**

ELSE PUBLICATION3=MISSING.

[ASK IF Q35=01 AND NOT MISSING PUBLICATION3]
[GRIDS, SP]

Q37. When you used [**PUBLICATION3]** online at the IRS website, which of the following did you use?

	Used	Did not use	Don't know / remember
[DO NOT SHOW NUMBER LABELS]	1	2	97

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

[ASK IF ANY OF Q37 ITEMS EQUAL 1 'USED'
ONLY SHOW Q37=1 ITEMS]
[GRIDS, SP]

Q38. Did you experience any problems with any of the sections that you used in electronic [**PUBLICATION3]**?

	Yes	No	Please describe any problem or issue you had with this feature
[DO NOT SHOW NUMBER LABELS]	1	2	**TEXTBOX; ONLY SHOW IF 'YES' IS CHECKED**

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

[ASK IF Q35=01 AND NOT MISSING PUBLICATION3]
[MEDIUM TEXTBOX]
Q39. How could the electronic [**PUBLICATION3**] be improved?

____

MARKETING

[GRIDS, SP]
Q40. Have you noticed any changes that have occurred since the 2009 tax season in:

	Yes	No	What changes?
[DO NOT SHOW NUMBER LABELS]	1	2	**TEXTBOX; ONLY SHOW IF 'YES' IS CHECKED**

a)Tax Forms
b) Instructions
c) Publications
d)Tax Laws

[ASK IF ANY Q40 ITEMS ARE EQUAL 1 'YES'
ONLY SHOW Q40=1 ITEMS]
[GRIDS, SP]
Q41. For the 2010 tax filing season, how satisfied are you with the changes that have occurred in each of the following areas?

	Very dissatisfied	Dissatisfied	Neither satisfied nor dissatisfied	Satisfied	Very satisfied
[DO NOT SHOW NUMBER LABELS]	1	2	3	4	5

a)Tax Forms
b) Instructions
c) Publications
d)Tax Laws

[ASK IF ANY Q40 ITEMS ARE EQUAL 1 'YES']
[SP]
Q42. How satisfied are you with getting information on tax law changes for the 2010 tax year?

Very dissatisfied....................1
Dissatisfied....................2
Neither satisfied nor dissatisfied....................3
Satisfied....................4
Very satisfied....................5
Not applicable/Have not used/No experience....................96

[GRIDS, SP]
Q43. How do you find out when tax forms and publications have changed?

	Yes	No	I don't know/remember
[DO NOT SHOW NUMBER LABELS]	1	2	97

01 IRS website
02 IRS workshop
03 Professional association
04 Word of mouth
05 Software programs
06 TV, radio, or print advertisements
07 Tax Preparer
95 Other (please specify)____________

[SP]
Q44. How satisfied are you with the way the IRS communicates changes in its forms, instructions and publications to its customers?

Very dissatisfied....................1
Dissatisfied....................2
Neither satisfied nor dissatisfied....................3
Satisfied....................4
Very satisfied....................5
Not applicable/Have not used/No experience....................96

OVERALL RATING

[SP]
PROMPT ONCE IF REFUSED
Q45A. Overall, how would you rate the IRS on forms, instructions, publications and other tax products that it develops, produces and distributes to taxpayers?

Very dissatisfied..1
Dissatisfied..2
Neither satisfied nor dissatisfied...3
Satisfied...4
Very satisfied...5
Not applicable/Have not used/No experience...............................96

DEMOGRAPHICS

[MP]
Q57. Where do you access the Internet?

Home..1
Work...2
Public library..3
School..4
Other..5
I do not access the Internet...6

[SP]

CLOSE
[DISPLAY]
CLOSE.
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 1545-1432 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.

On behalf of the IRS and Fors Marsh Group LLC, thank you very much for your participation. Your responses will be very helpful for the IRS in better serving taxpayers' needs in the future. If you have any comments or questions, please feel free to email us at irssurveyhelp@forsmarshgroup.com.

INSERT STANDARD CLOSE

OMB #1545-1432

Customer Satisfaction Survey for External Customers of Media and Publications Division

2012 Forms Distribution Survey
Web version

Internal Revenue Service
Tax Forms and Publications Division

Welcome to the IRS Media and Publications Division customer satisfaction survey. Fors Marsh Group LLC, an independent research organization, is working with the IRS to obtain your feedback as an individual that orders federal tax products from the IRS.

This survey should take no longer than 10 minutes.

If you wish to verify the IRS's sponsorship of the survey, please visit the IRS website at: http://www.irs.gov/formspubs/article/0,,id=221121,00.html.

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

Privacy to the Extent Allowed by Law and Security

Fors Marsh Group will hold your identity private to the extent allowed by law and will provide results to the IRS in aggregate. Fors Marsh Group will provide the IRS with the raw data with all personally identifying information removed. Please feel confident that your answers will be used solely for the purpose stated earlier.

Paperwork Reduction Act Notice

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is 1545-1432. 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.

CUSTOMER CLASSIFICATION

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

- ❑ Tax Forms Outlet Program (TFOP)
- ❑ Community Based Outlet Program (CBOP)

- ❑ International Program (INTL)
- ❑ Other Please specify ________________________
- ❑ Don't know

2. In what type of business or government agency do you work? *Please check only one*
   - ❑ Credit union
   - ❑ Copy center
   - ❑ Grocery
   - ❑ Library
   - ❑ Pharmacy
   - ❑ Post office
   - ❑ City/County government offices
   - ❑ Military installation
   - ❑ Prison
   - ❑ Federal government
   - ❑ Department of State
   - ❑ Embassy/Consulate
   - ❑ Other, please specify ___________________________________

2a What is your zip code?

TAX PRODUCT ORDERING AND FULFILLMENT

3. During the current tax year, about how many people obtained federal tax products from your location?
   - ❑ None **[Terminate survey] Thank you**
   - ❑ 1-250
   - ❑ 251-500
   - ❑ More than 500

4. How did you order the federal tax forms, instructions, publications or other federal tax products for the most current tax year? *Please select all that apply.*
   - ❑ E-Order (E-mail) **[If checked, include Q5; otherwise, skip Q5]**
   - ❑ Telephone **[If checked, include Q6; otherwise, skip Q6]**
   - ❑ Other. Please specify _

   ____

5. How would you rate your experience with ordering your federal tax products by E-Order (E-mail) and your experience with subsequent e-mail confirmations?
   - ❑ 5 - Very easy
   - ❑ 4 - Easy
   - ❑ 3 - Neither Easy nor Difficult
   - ❑ 2 - Difficult
   - ❑ 1 - Very difficult

6. How would you rate your experience with ordering your federal tax products by telephone?
   - ❑ 5 - Very easy
   - ❑ 4 - Easy
   - ❑ 3 - Neither Easy nor Difficult
   - ❑ 2 - Difficult
   - ❑ 1 - Very difficult

7. Did you receive all, some, or none of the current federal tax year products that you ordered?
   - ❑ All **[Skip to Q9]**
   - ❑ Some
   - ❑ None

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

   ____
   ____
   ____

9. **[If Q7=None, Skip to Q11]** Were the tax products that you ordered for the current federal tax year received within a time frame that met your expectations?
   - ❑ Always **[Skip to Q17]**
   - ❑ Some of the time
   - ❑ Never

10. Which federal tax products were not received within a timeframe that met your expectations?

    ____
    ____
    ____

11. On average, how much later than expected were those products received?
    - ❑ 1 week
    - ❑ 2 weeks
    - ❑ 3 weeks
    - ❑ 1 month
    - ❑ More than a month

12. Did you receive any communications from the IRS explaining that products would be going out or arriving late?
    - ❑ Yes
    - ❑ No

13. When you did not receive the current federal tax year products you ordered within a timeframe that met your expectations, which of the following did you do?

Please check all that apply.

- ❑ Checked the IRS programs, including website, for product availability or delays
- ❑ Downloaded product(s) from the web
- ❑ Called or e-mailed the Tax Forms Outlet Program (TFOP)
- ❑ Called the Community Based Outlet Program (CBOP)
- ❑ Called or e-mailed the International Program (INTL)
- ❑ Took no action **[Skip to Q17]**
- ❑ Other Please specify ___________________________

14. How easy was it for you to reach the IRS about your late or missing product(s)?

- ❑ 5 - Very easy **[Skip to Q16]**
- ❑ 4 - Easy **[Skip to Q16]**
- ❑ 3 - Neither Easy nor Difficult **[Skip to Q16]**
- ❑ 2 - Difficult
- ❑ 1 - Very difficult

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

16. **[If Q7=None, Skip to Q17]** How satisfied were you with how the IRS resolved issues with the product(s) that you didn't receive or didn't meet your delivery expectations.?

- ❑ 5 - Very satisfied TIRNO-08-Z-00021
- ❑ 4 - Satisfied
- ❑ 3 - Neither Satisfied nor Dissatisfied
- ❑ 2 - Dissatisfied
- ❑ 1 - Very dissatisfied

17**.** Are you aware of ways that the IRSinforms you of product delivery status?

- ❑ Yes
- ❑ No

18. What is the best method for the IRS to get updated information to you?

- ❑ Internet
- ❑ E-Mail
- ❑ Mail
- ❑ Other Please specify _____________________________________

19. **[If Q7=None, Skip to Q27]** Did you receive your order in multiple shipments?

- ❑ Yes

- ❑ No **[Skip to Q22]**
- ❑ Don't know **[Skip to Q22]**

20. Did receiving multiple shipments present any challenges or difficulties for you?
    - ❑ Yes
    - ❑ No **[Skip to Q22]**

21. Please describe the challenges you encountered in receiving your order in multiple shipments.

    ____

22. Did you receive the most current federal tax products you ordered in good usable condition?
    - ❑ Yes **[Skip to Q27]**
    - ❑ No

23. Which federal tax products were not received in usable condition?

    ___

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

25. How would you rate your experience with reaching the IRS (CBOP/TFOP/International Program) about the defective product?
    - ❑ 5 - Very easy **[Skip to Q27]**
    - ❑ 4 - Easy **[Skip to Q27]**
    - ❑ 3 - Neither Easy nor Difficult **[Skip to Q27]**
    - ❑ 2 - Difficult
    - ❑ 1 - Very difficult

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

    ____
    ____
    ____

27. Overall, how would you rate your satisfaction with the IRS order and delivery process for federal tax products and services?

❑	5 - Very satisfied	**[Skip to Q29]**
❑	4 - Satisfied	**[Skip to Q29]**
❑	3 –Neither Satisfied nor Dissatisfied	**[Skip to Q29]**
❑	2 - Dissatisfied	
❑	1 - Very dissatisfied	

28. What were the reason(s) for your dissatisfaction with the order and delivery services you received through the program?

29. In your opinion, what would be the most important improvements that the IRS could make in its tax forms order and fulfillment process?

____

____

30. Do you believe your patrons find value in the service this program offers to taxpayers**?**

- ❑ Yes
- ❑ No
- ❑ Don’t Know

OMB #1545-1432

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

IRS Media and Publication Division
2012 Tax Preparer Survey

Online Version

Internal Revenue Service
Tax Forms and Publications Division

///PROGRAMMER: NEVER DISPLAY THE RESPONSE CODES, NEVER DISPLAY THE CODE N/A VALUE (98)///

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///PROGRAMMER: PLEASE POST "FOR TECHNICAL ASSISTANCE, PLEASE CONTACT OUR HELP DESK VIA E-MAIL AT irssurveyhelp@forsmarshgroup.com OR CALL 1-800-521-7117" AT THE BOTTOM OF EACH SCREEN///

//ASK ALL//

Web Introduction

Welcome to the IRS Media and Publications Division customer satisfaction survey. Fors Marsh Group LLC, 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 15 minutes.

If you wish to verify the IRS's sponsorship of the survey, please visit the IRS website at: [UPDATED LINK]

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

//ASK ALL//

Private to the Extent Allowed by Law and Security

Fors Marsh Group will hold your identity private to the extend allowed by law and will provide results to IRS in aggregate. Fors Marsh Group will provide IRS with the raw data with all personally identifying information removed. Please feel confident that your answers will be used solely for the purpose stated above.

Paperwork Reduction Act Notice

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is 1545-1432. 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.

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//ASK ALL//

Q1. Approximately how many 2010 federal income tax returns did you prepare for **individuals**?

01 Less than 100

02 100-299

03 300-499

04 500 or More

98 Not sure

//ASK ALL//

Q2. Approximately how many 2010 federal income tax returns did you prepare for **businesses**?

01 Less than 10

02 10-49

03 50-99

04 100 or More

98 Not sure

TAX FORMS

//ASK ALL//

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

		Never 01	Rarely 02	Sometimes 03	Frequently 04
Q3A.	Long form 1040	O	O	O	O
Q3B.	Form 1040-ES	O	O	O	O
Q3C.	Form 1040 A	O	O	O	O
Q3D.	Form 941	O	O	O	O
Q3E.	Form 1065	O	O	O	O
Q3F.	Form 1120	O	O	O	O
Q3G.	Form 1120S	O	O	O	O
Q3H.	Form 4562 Depreciation and Amortization	O	O	O	O
Q3I.	Form 6251 Alternative minimum tax (individuals)	O	O	O	O
Q3J.	Schedule A for itemized deductions	O	O	O	O
Q3K.	Schedule B for interest and dividend income	O	O	O	O
Q3L.	Schedule C or C-EZ for small business income	O	O	O	O
Q3M.	Schedule D for capital gains or losses	O	O	O	O
Q3N.	Schedule E for rent or royalty	O	O	O	O

	income (page 1)				
Q3O.	Schedule E for income from a partnership, S corporation, or trust (page 2)	O	O	O	O
Q3P.	Schedule SE	O	O	O	O
Q3Q.	Form 8863 for Education Credits (American Opportunity and Lifetime Learning Credits	O	O	O	O

//ASK IF ANY Q3A-Q3P ≠ 1//
//ONLY DISPLAY FORMS THAT ≠ 1//
Q4. Thinking about ease of use, ease of understanding, and design, how would you rate the following forms?

		Very Poor 01	Poor 02	Neutral 03	Good 04	Very Good 05
Q4A.	Long form 1040	O	O	O	O	O
Q4B.	Form 1040-ES	O	O	O	O	O
Q4C.	Form 1040 A	O	O	O	O	O
Q4D.	Form 941	O	O	O	O	O
Q4E.	Form 1065	O	O	O	O	O
Q4F.	Form 1120	O	O	O	O	O
Q4G.	Form 1120S	O	O	O	O	O
Q4H.	Form 4562 Depreciation and Amortization	O	O	O	O	O
Q4I.	Form 6251 Alternative minimum tax (individuals)	O	O	O	O	O
Q4J.	Schedule A for itemized deductions	O	O	O	O	O
Q4K.	Schedule B for interest and dividend income	O	O	O	O	O
Q4L.	Schedule C or C-EZ for small business income	O	O	O	O	O
Q4M.	Schedule D for capital gains or losses	O	O	O	O	O

Q4N.	Schedule E for rent or royalty income (page 1)	O	O	O	O	O
Q4O.	Schedule E for income from a partnership, S corporation, or trust (page 2)	O	O	O	O	O
Q4P.	Schedule SE	O	O	O	O	O
Q4Q.	Form 8863 for Education Credits (American Opportunity and Lifetime Learning Credits	O	O	O	O	O

//ASK ALL//

Q5. 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 Disagree 01	Disagree 02	Neither Agree or Disagree 03	Agree 04	Strongly Agree 05	Don't Know/ N/A 98
Q5G.	The graphics and layout made it easy to follow	O	O	O	O	O	O
Q5H.	The size of the print made it easy to read	O	O	O	O	O	O
Q5C.	It was easy to go back and forth between the instructions and the tax form	O	O	O	O	O	O
Q5I.	The section headings were useful	O	O	O	O	O	O
Q5E.	The publication was as clear as possible, given the tax law	O	O	O	O	O	O
Q5K.	The forms made it more difficult to make accurate calculations	O	O	O	O	O	O
Q5B.	It was easy to understand the instructions for the form.	O	O	O	O	O	O
Q5A.	It was easy to understand the forms.	O	O	O	O	O	O
Q5D.	It was easy to find answers	O	O	O	O	O	O

	in the publications.						
Q5F.	It was easy to go back and forth between the publication and instructions	O	O	O	O	O	O

///PROGRAMMER: If all selections Q4A-Q4Q ≠ 1 or 2, Skip to Q7///

///PROGRAMMER: For any selection Q4A-Q4Q = 1 or 2, continue with Q6. Repeat up to a total of 3 times. If more than 3 selections in Q4A-Q4Q = 1 or 2, choose only 3 selections at random, then continue to Q7///

///ASK IF Q4A-Q4Q = 01 OR 02///
Q6. Please tell us how any of the forms you rated as 'Very Poor' or 'Poor' could be improved.

Please tell us how [Q4A-Q4Q=01 OR 02] could be improved.

____
____
____

TAX INSTRUCTIONS

//ASK ALL//
Q7. In general, how would you rate the following aspects of the federal tax instructions used to file your 2010 returns?

		Very Poor 01	Poor 02	Neutral 03	Good 04	Very Good 05	Didn't Use 98
Q7A.	Table of contents	O	O	O	O	O	O
Q7B.	Important changes	O	O	O	O	O	O
Q7C.	Index	O	O	O	O	O	O
Q7D.	Worksheet	O	O	O	O	O	O
Q7E.	Examples	O	O	O	O	O	O
Q7F.	Flow charts	O	O	O	O	O	O
Q7G.	Appendix	O	O	O	O	O	O
Q7H.	Tax tables	O	O	O	O	O	O
Q7I.	Tips	O	O	O	O	O	O

PUBLICATIONS

//ASK ALL//

Q8. How often did you use the following publications in the 2010 tax year?

		Never	Rarely	Sometime	Frequently

		01	02	s 03	04
Q8A.	Pub 17 - *Your Federal Income Tax*	O	O	O	O
Q8B.	Pub 463 - *Travel, Entertainment, Gift, and Car Expenses*	O	O	O	O
Q8C.	Pub 501 - *Exemptions, Standard Deductions, and Filing Instructions*	O	O	O	O
Q8D.	Pub 502 - *Medical and Dental Expenses*	O	O	O	O
Q8E.	Pub 505 - *Tax Withholding and Estimated Tax*	O	O	O	O
Q8F.	Pub 523 - *Selling Your Home*	O	O	O	O
Q8G.	Pub 525 - *Taxable and Nontaxable Income*	O	O	O	O
Q8H.	Pub 535 - *Business Expenses*	O	O	O	O
Q8I.	Pub 550 - *Investment Income and Expenses*	O	O	O	O
Q8J.	Pub 590 - *Individual Retirement Arrangements (IRAs)*	O	O	O	O
Q8K.	Pub 596 - *Earned Income Credit*	O	O	O	O
Q8L.	Pub 946 - *How to Depreciate Property*	O	O	O	O
Q8M.	Pub 970 - *Tax Benefits for Education*	O	O	O	O
Q8N.	Another Publication (Please Specify) ________________	O	O	O	O

//ASK IF ANY IN Q8 >1//

Q9. In general, how would you rate the following aspects of the publications used in the 2010 tax year?

		Very Poor 01	Poor 02	Neutral 03	Good 04	Very Good 05	Don’t Know N/A 98
Q9A.	Table of contents	O	O	O	O	O	O
Q9B.	Important changes	O	O	O	O	O	O
Q9C.	Index	O	O	O	O	O	O
Q9D.	Worksheet	O	O	O	O	O	O
Q9E.	Examples	O	O	O	O	O	O
Q9F.	Flow charts	O	O	O	O	O	O
Q9G.	Appendix	O	O	O	O	O	O

Q9H.	Tax tables	O	O	O	O	O	O
Q9I.	Tips	O	O	O	O	O	O

// ASK IF ANY IN Q8 >1//
//ONLY SHOWQ8>1//
Q10. Thinking about your overall satisfaction, how would you rate each of the following publications?

		Very Poor 01	Poor 02	Neutral 03	Good 04	Very Good 05
Q10A.	Pub 17 - *Your Federal Income Tax*	O	O	O	O	O
Q10B.	Pub 463 - *Travel, Entertainment, Gift, and Car Expenses*	O	O	O	O	O
Q10C.	Pub 501 - *Exemptions, Standard Deductions, and Filing Instructions*	O	O	O	O	O
Q10 D.	Pub 502 - *Medical and Dental Expenses*	O	O	O	O	O
Q10E.	Pub 505 - *Tax Withholding and Estimated Tax*	O	O	O	O	O
Q10F.	Pub 523 - *Selling Your Home*	O	O	O	O	O
Q10 G.	Pub 525 - *Taxable and Nontaxable Income*	O	O	O	O	O
Q10 H.	Pub 535 - *Business Expenses*	O	O	O	O	O
Q10I.	Pub 550 - *Investment Income and Expenses*	O	O	O	O	O
Q10J.	Pub 590 - *Individual Retirement Arrangements (IRAs)*	O	O	O	O	O
Q10K.	Pub 596 - *Earned Income Credit*	O	O	O	O	O
Q10L.	Pub 946 - *How to Depreciate Property*	O	O	O	O	O
Q10 M.	Pub 970 - *Tax Benefits for Education*	O	O	O	O	O
Q10 N.	Another Publication (Please Specify) ________________	O	O	O	O	O

///PROGRAMMER: For any selection Q10A-Q10N = 1 or 2, continue with Q11. Repeat up to a total of 3 times. If more than 3 selections in Q10A-Q10N = 1 or 2, choose only 3 selections at random, then continue to Q12///

///ASK IF Q10A-Q10N = 01 OR 02///
Q11. Please tell us how any of the publications you rated as ‘Very Poor’ or

'Poor' could be improved.

Please tell us how [Q10A-Q10N=01 OR 02] could be improved.

____

____

____

//ASK IF Q8A ≠ 1//
Q12. Please indicate how frequently you used the following sections in Publication 17,
Your Federal Income Tax, when you filed your latest tax return.

		Never 01	Rarely 02	Occasionally 03	Frequently 04	Very Frequently 05	Unaware product/service was available
Q12A.	The Income Tax Return- including filing status, personal exemptions, and dependents	O	O	O	O	O	
Q12B.	Income- including wages, tips, dividends, pensions, and social security income, etc.	O	O	O	O	O	
Q12C.	Gains and Losses- including basis of property, selling your home, gains and losses, etc.	O	O	O	O	O	
Q12D.	Adjustments to Income- including alimony, IRAs, and education-related adjustments	O	O	O	O	O	
Q12E.	Standard Deduction and Itemized Deductions- including medical care, interest deductions, and taxes, etc.	O	O	O	O	O	
Q12F.	Figuring Your Taxes and Credits- including child and dependent care expenses, earned income credit, education credits, etc.	O	O	O	O	O	
Q12G.	Tax Tables and Tax Rate Schedule	O	O	O	O	O	

MARKETING

//ASK ALL//

Q13. How satisfied are you that you knew about changes which occurred in **tax forms** that you needed to use for the 2010 tax filing season?

01 Very Dissatisfied
02 Dissatisfied
03 Neither Satisfied nor Dissatisfied
04 Satisfied
05 Very Satisfied

//ASK ALL//

Q14. How satisfied are you that you knew about changes which occurred in **publications** that you needed to use for the 2010 tax filing season?

01 Very Dissatisfied
02 Dissatisfied
03 Neither Satisfied nor Dissatisfied
04 Satisfied
05 Very Satisfied

//ASK ALL//

Q15. Do you find out that tax forms and publications have changed by any of the following methods?

	Yes	No
Q15_1 IRS website	O	O
Q15_2 Taxpayer Assistance Center (TAC) or Volunteer Income Tax Assistance (VITA)	O	O
Q15_3 IRS Tax Forums	O	O
Q15_4 Professional association	O	O
Q15_5 Word of mouth	O	O
Q15_6 Software programs	O	O
Q15_7 TV, radio, or print advertisements	O	O
Q15_8 Other (*Please specify*) _________________	O	O
Q15_98 Not sure	O	

OVERALL RATING

//ASK ALL//

Q16. Overall how would you rate the IRS on forms, instructions, publications, and other tax products that it develops, produces, and distributes to taxpayers?

01 Very Dissatisfied
02 Dissatisfied
03 Neither Satisfied nor Dissatisfied
04 Satisfied
05 Very Satisfied

On behalf of IRS Media and Publications and Fors Marsh Group, thank you very much for your time.

If you have any questions about this survey, please contact the survey processing center at
1-800-571-7177, or email us at irssurveyhelp@forsmarshgroup.com.

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

2012 Business Taxpayer Survey

Online Version

Internal Revenue Service
Tax Forms and Publications Division

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//ASK ALL//

Q1. Did your business file a 2010 federal income tax return?

01 Yes
02 No
03 Not Sure

//IF Q1= 02 OR Q1=03
SOFT PROMPT "Are you sure that your business did not file a 2010 federal income tax return?"//

//IF Q1=02 OR Q1=03 AFTER SOFT PROMPT//
SCREEN OUT

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

Q3. Did you file the following tax forms for your 2010 business federal income tax return?

	Yes 01	No 02
Q3_1 1120 for a Corporation	O	O
Q3_2 1120S for an S Corp	O	O
Q3_3 1065 for a Partnership	O	O
Q3_4 1065B for a Partnership	O	O
Q3_5 1040 Schedule C for an Individual	O	O
Q3_6 1040 Schedule C-EZ for an Individual	O	O
Q3_7 1040 Schedule E for an Individual	O	O
Q3_8 1040 Schedule F for an Individual	O	O
Q3_9 Other (*Please specify*)_______________	O	O
Q3_10 Not sure	O	

Q4. Who prepared your business's 2010 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)
03 Someone else (Please specify) ________________________________
04 Not sure

Q5. How did you or your preparer <u>prepare</u> your business income tax return?

01 Prepared using paper IRS forms

02 Prepared return using software (electronically)
03 Not sure

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

1 Filed paper tax return by regular mail
2 Filed electronically by computer (e-file)
03 Not sure

Q7. Did your business pay estimated taxes in 2010?

01 Yes
02 No
03 Not sure

//ASK IF Q7=01//
Q8. How did you determine your estimated tax payments in 2010?

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
03 Not sure

TAX FORMS, INSTRUCTIONS AND PUBLICATIONS

Q9. Did you receive ANY tax forms, instructions, or publications for your 2010 federal tax returns from the following sources?

	Yes 01	No 02
Q9_1 IRS office	O	O
Q9_2 IRS website	O	O
Q9_3 Other Website	O	O
Q9_4 Tax preparation software or computer program	O	O
Q9_5 Accountant or tax preparer	O	O
Q9_6 Library	O	O
Q9_7 Post office	O	O
Q9_8 Other (*Please specify*) ________________	O	O
Q9_9 None of these	O	

Q10. Did you use the electronic version of any *federal tax form* on the IRS website during the 2010 tax season?

01 Yes
02 No

//ASK IF Q10=01//
Q10a. If yes, which electronic tax form(s) did you use? ___________________

Q11. In thinking about the 2010 tax forms, instructions and publications you used, please rate your satisfaction with each of the following items:

		Very Dissatisfied 01	Dissatisfied 02	Somewhat Satisfied 03	Satisfied 04	Very Satisfied 05
Q11A.	Knowing where to find tax forms and instructions	O	O	O	O	O
Q11B.	The ease of getting tax forms and instructions	O	O	O	O	O
Q11C.	The ease of determining which forms and instructions you needed	O	O	O	O	O
Q11D.	The ease of understanding the forms	O	O	O	O	O
Q11E.	Knowing what you needed to do to complete the forms	O	O	O	O	O
Q11F.	The ease of understanding the instructions for the form	O	O	O	O	O
Q11G.	The completeness of instructions	O	O	O	O	O
Q11H.	The completeness of the publications	O	O	O	O	O
Q11I.	The ease of understanding the publications	O	O	O	O	O
Q11J.	The ease of finding answers in the publications	O	O	O	O	O

PUBLICATIONS

Q12. Please indicate if you have used any of these publications in printed format or in electronic format from the IRS website. If you have not used a publication in the past 12 months, please check "Did Not Use".

		Used Printed Publication 01	Used Electronic Publication 02	Did Not Use 03
Q12A.	Pub 15 - *Circular E, Employer's Tax Guide*	O	O	O
Q12B	Pub 509 - *Tax Calendars for 2010*	O	O	O
Q12C	Pub 544 - *Sales and Other*	O	O	O
Q12D	Pub 946 - *How To Depreciate Property*	O	O	O

Q12E	Pub 17 - *Your Federal Income Tax*	O	O	O
Q12F	Other (*Please specify*) ____________	O	O	O

//PROGRAMMER: IF Q12= 3 OR Q12=BLANK FOR ALL SELECTIONS SKIP TO Q21//

//ASK IF Q12E=01 OR Q12E=02//

Q13. Please indicate how frequently you used the following sections in Publication 17, Your Federal Income Tax, when you filed your latest tax return.

		Never 01	Rarely 02	Occasionally 03	Frequently 04	Very Frequently 05	NA/Have not used/No experience 06	Unaware product/service was available 07
Q13A.	The Income Tax Return- including filing status, personal exemptions and dependents	O	O	O	O	O	O	O
Q13B.	Income- including wages, tips, dividends, pensions and social security income, etc.	O	O	O	O	O	O	O
Q13C.	Gains and Losses- including basis of property, selling your home, gains and losses, etc.	O	O	O	O	O	O	O
Q13D.	Adjustments to Income- including alimony, IRAs and education-related adjustments	O	O	O	O	O	O	O
Q13E.	Standard Deduction and Itemized Deductions- including medical care, interest deductions and taxes, etc.	O	O	O	O	O	O	O
Q13F.	Figuring Your Taxes and Credits- including child and dependent care expenses, earned income credit, education credits, etc.	O	O	O	O	O	O	O
Q13G.	Tax Tables and Tax Rate Schedule	O	O	O	O	O	O	O

//ASK IF AT LEAST 1 SELECTION IN Q12=01, 02 //

Q14. For those publications that you did use, in either printed or electronic format, please rate your satisfaction.

		Very Dissatisfied 01	Dissatisfied 02	Somewhat Satisfied 03	Satisfied 04	Very Satisfied 05
Q14A	Pub 15 - *Circular E, Employer's Tax Guide*	O	O	O	O	O
Q14B	Pub 509 - *Tax Calendars for*	O	O	O	O	O

	2012					
Q14C	Pub 544 - *Sales and Others*	O	O	O	O	O
Q14D	Pub 946 - *How to Depreciate Property*	O	O	O	O	O
Q14E	Pub 17 - *Your Federal Income Tax*	O	O	O	O	O

//ASK IF AT LEAST 2 SELECTION IN Q12=01, 02 //
//PROGRAMMER IF ONLY 1 SELECT IN Q12=01, 02 ASSUME IT IS MOST OFTEN USED//
Q15. We would like to know which publications you used most often in the last 12 months. Of the publications below, *check the one you used most often*. Next, check the one that you used 2nd most often. Please check only one choice in each row. If you used less than two publications, please check "N/A" for those rows that are not applicable to you.

		Pub 15	Pub 509	Pub 544	Pub 946	Other	N/A
Q15A	Used Most Often	O	O	O	O	O	O
Q15B	Used 2nd Most Often	O	O	O	O	O	O

//ASK IF AT LEAST 1 SELECTION IN Q12=01, 02 //
//PIPE IN RESPONSE FROM Q15A=1-4 OTHER WISE LEAVE BRAKETED TEXT AS IS//
Q16. Please indicate whether each of the statements below describe how you found out about [the publication you used **most often**]?

		Yes 01	No 02
Q16_1.	Tax form instructions referred me to it	O	O
Q16_2.	List of publications in instructions	O	O
Q16_3.	IRS website	O	O
Q16_4.	From doing taxes in previous years	O	O
Q16_5.	IRS mailed it to me	O	O
Q16_6.	From my tax preparer	O	O
Q16_7.	Other (*Please specify*) ______	O	O

//ASK IF AT LEAST 2 SELECTION IN Q12=01, 02 //
//PIPE IN RESPONSE FROM Q15A=1-4 OTHER WISE LEAVE BRAKETED TEXT AS IS//
Q17. Please indicate whether each of the statements below describe how you found out about [the publication you used **2nd most often**]?

		Yes 01	No 02
Q17_1.	Tax form instructions referred me to it	O	O

Q17_2.	List of publications in instructions	O	O
Q17_3.	IRS website	O	O
Q17_4.	From doing taxes in previous years	O	O
Q17_5.	IRS mailed it to me	O	O
Q17_6.	From my tax preparer	O	O
Q17_7.	Other (*Please specify*) ______	O	O

//ASK IF AT LEAST 1 SELECTION IN Q12=01, 02 //
//PIPE IN RESPONSE FROM Q15A=1-4 OTHER WISE LEAVE BRAKETED TEXT AS IS//
Q18. For [the publication you used **most often**], how would you rate each of the following aspects?

		Very Poor 01	Poor 02	Neutral 03	Good 04	Very Good 05	Did not use/ N/A
Q18A.	Table of contents	O	O	O	O	O	O
Q18B.	Important changes	O	O	O	O	O	O
Q18C.	Index at back	O	O	O	O	O	O
Q18D.	Worksheet	O	O	O	O	O	O
Q18E.	Examples	O	O	O	O	O	O
Q18F.	Flow charts	O	O	O	O	O	O
Q18G.	Appendix	O	O	O	O	O	O
Q18H.	Tax tables	O	O	O	O	O	O
Q18I.	Tips	O	O	O	O	O	O

//ASK IF AT LEAST 1 SELECTION IN Q12=01, 02 //
//PIPE IN RESPONSE FROM Q15A=1-4 OTHER WISE LEAVE BRAKETED TEXT AS IS//
Q19. In thinking about your experience with [the publication you used MOST OFTEN], to what extent do you agree or disagree with the following statements.

		Strongly Disagree 01	Disagree 02	Neither Agree nor Disagree 03	Agree 04	Strongly Agree 05	Did not use 98
Q19A.	The language was understandable.	O	O	O	O	O	O
Q19B.	The graphics and layout made it easy to follow.	O	O	O	O	O	O
Q19C.	The size of the print made it easy to read.	O	O	O	O	O	O
Q19D.	It was easy to find the information that I was looking for.	O	O	O	O	O	O
Q19E.	It was easy to go back and forth between the publication and the instructions.	O	O	O	O	O	O
Q19F.	The section headings were useful.	O	O	O	O	O	O
Q19G.	The publication was as clear as possible, given the tax law.	O	O	O	O	O	O

Q19H.	The forms made it easy to make accurate calculations.	O	O	O	O	O	O

//ASK IF AT LEAST 1 SELECTION IN Q12=01, 02 //
//PIPE IN RESPONSE FROM Q15A=1-4 OTHER WISE LEAVE BRAKETED TEXT AS IS//
Q20. How could [the publication you used most often] be improved?

____

____

____

IRS WEBSITE

//ASK ALL//
Q21. Approximately how many times have you accessed the IRS website to get forms, instructions or publications in the last year?

01 Never
02 Once
03 2 -5 times
04 6 -10 times
05 more than 10 times

//ASK IF Q21≠01//
Q23. Did you use the IRS website last year to do each of the following?

	Yes 01	No 02
Q23_1 View a specific form	O	O
Q23_2 Download a specific form	O	O
Q23_3 View a specific publication	O	O
Q23_4 Download a specific publication	O	O
Q23_5 View instructions	O	O
Q23_6 Download instructions	O	O
Q23_7 Get an answer to a tax question	O	O
Q23_8 See what changes had been made in tax laws	O	O

Q23_9 Find out how to get help with your taxes	O	O
Q23_10 Other (*Please specify)* ___________________	O	O
Q23_11 Did not access IRS website in the past year	O	

Q30. Are you aware that the IRS electronic tax publications are available in both pdf and html format?

01 Yes
02 No

//ASK IF Q21≠01//
24. How would you rate your overall satisfaction with downloading tax forms, publications and instructions from the IRS website?

	Very Dissatisfied 01	Dissatisfied 02	Somewhat Satisfied 03	Satisfied 04	Very Satisfied 05
Q24A. Tax Forms	O	O	O	O	O
Q24B. Instructions	O	O	O	O	O
Q24C. Publications	O	O	O	O	O

MARKETING

//DUE TO PROGRAMMING LIMITATIONS Q25 HAD TO BE SPLIT INTO 2 PARTS. IF RESPONDENT ANSWERS 01 TO ANY ITEM, THEY WILL APPEAR IN A FOLLOW UP QUESTION ASKING THEM TO DESCRIBE HOW THEY CHANGED//

Q25. Have you noticed any changes since you filled your 2009 tax return in:

	Yes 01	No 02
Q25A. Tax Forms	O	O
Q25B. Instructions	O	O
Q25C. Publications	O	O
Q25D. Tax Laws	O	O

//ASK IF ANY OF ITEMS IN Q25 = 01//
//ONLY SHOW ITEMS IN Q25=01//
What changes have you noticed?

Q25A. Tax Forms	Open
Q25B. Instructions	Open
Q25C. Publications	Open
Q25D. Tax Laws	Open

//ASK IF ANY OF ITEMS IN Q25 = 01//
//ONLY SHOW ITEMS IN Q25=01//
Q26. For the 2010 tax filing season, how satisfied are you with the changes which have occurred in **each of the following areas**?

	Very Dissatisfied 01	Dissatisfied 02	Somewhat Satisfied 03	Satisfied 04	Very Satisfied 05
Q26A. Tax Forms	O	O	O	O	O
Q26B. Instructions	O	O	O	O	O
Q26C. Publications	O	O	O	O	O
Q26D. Tax Laws	O	O	O	O	O

//ASK ALL/
Q27. How satisfied are you with **getting information on tax law changes** for the 2010 tax year?

01 Very Dissatisfied
02 Dissatisfied
03 Neither Satisfied Nor Dissatisfied
04 Satisfied
05 Very Satisfied
98 Not Applicable

//ASK ALL/
Q28. Please indicate whether you found out that tax forms and publications changed through any of the following sources:

	Yes	No
Q28_1 IRS website	O	O
Q28_2 Taxpayer Assistance Center (TAC) or Volunteer Income Tax Assistance (VITA)	O	O
Q28_3 IRS Tax Forums	O	O
Q28_4 Professional association	O	O
Q28_5 Word of mouth	O	O
Q28_6 Software programs	O	O
Q28_7 TV, radio, or print advertisements	O	O
Q28_8 Tax Preparer	O	O
Q28_9 Other (*Please specify*) ___________________	O	O
Q28_10 Not sure	O	

OVERALL RATING

//ASK ALL//

Q29. Overall how would you rate the IRS on forms, instructions, publications and other tax products that it develops, produces and distributes to taxpayers?

01 Very Dissatisfied
02 Dissatisfied
03 Neither Satisfied Nor Dissatisfied
04 Satisfied
05 Very Satisfied

On behalf of IRS Media and Publications and Fors Marsh Group, thank you very much for your time.

If you have any questions about this survey, please contact the survey processing center at 1-800-521-7177, or email irssurveyhelp@forsmarshgroup.com

OMB #1545-1432

M&P 2012 Business Taxpayers Survey
Pre-notification Letter

[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. I invite you to take part in a survey asking for your opinions about the resources available to you when you prepare the tax returns for your business.

Fors Marsh Group, an independent research company, is administering the survey for the IRS. In a few days, you will receive a letter from Fors Marsh Group with instructions for completing the survey online or by mail. It should take about 15 minutes to complete. Your participation is voluntary. By completing this survey you will help the IRS develop a comprehensive portfolio of service improvements.

Fors Marsh Group 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. Your responses will be reported to the IRS only in aggregate with the responses from other businesses.

We are committed to improving service to every customer. Please help us in this effort by completing the survey as soon as possible. If you wish to verify the IRS's sponsorship of the survey, please contact Patty Wagner, Tax Forms & Publications, at 202-283-0188 or patty.wagner@irs.gov.

Sincerely,

Karen Becton-Johnson
Director
Media and Publications

Fors Marsh Group LLC

Business Taxpayer Satisfaction Survey
P.O. Box 42048
Arlington, VA 22204-9927

[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 Karen Becton-Johnson, Director, Media and Publications for the 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 to participate in this survey, which is administered by Fors Marsh Group, an independent research company. You may complete the survey either by mail or online. If you are completing the survey by mail, please use the postage-paid reply envelope to return your completed survey by [insert date].

If you choose to complete it online, you can access the survey from any computer that has Internet access by copying the Internet address below into your browser:

www.pubs2012business.com

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

[INSERT PASSWORD] [Password will be generated from sample for each survey recipient.]

You will be able to exit the survey and re-enter at a later time using this password. It will also protect any data you have entered if you experience any computer disruptions. Fors Marsh Group will not share these passwords with the IRS at any time during or after this study. Fors Marsh Group 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. Your responses will be reported to the IRS only in aggregate with the responses from other businesses.

The survey should take about 15 minutes to complete. While your participation is voluntary, we strongly encourage you to complete the survey. If you have any questions or concerns about the survey process, please call us toll-free at 1-800-521-7177, or email us at irssurveyhelp@forsmarshgroup.com.

If you wish to verify the IRS's sponsorship of the survey, please contact Patty Wagner, Tax Forms & Publications, at 202-283-0188 or patty.wagner@irs.gov.

Thank you in advance for your cooperation.

Sincerely,

Brian K. Griepentrog, Ph.D.
Director of Research
Fors Marsh Group LLC

M&P 2012 Business Taxpayers Survey
Reminder Postcard

Do We Have Your Input Yet?

Recently, you received a letter asking you to complete a survey about IRS resources that are available to you as a business when preparing your business's tax returns. The survey can be completed either by mail or online.

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 toll-free at 1-800-521-7177. When contacting us, you may also request your unique password so that you can complete the survey that is available online at www.pubs2012business.com.

Thank you.

Brian K. Griepentrog, Ph.D.
Director of Research
Fors Marsh Group LLC

M&P 2012 Business Taxpayers Survey
Reminder Letter

Fors Marsh Group LLC

Business Taxpayer Satisfaction Survey
P.O. Box 42048
Arlington, VA 22204-9927

[DATE]

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

Dear [INSERT NAME]:

Recently, you received a letter from Karen Becton-Johnson, Director, Media and Publications for the IRS, inviting you to participate in an online survey of businesses that prepare and file business tax returns. Fors Marsh Group, an independent research company, is administering this survey to help the IRS improve the resources it offers to businesses.

Our records indicate that you have not yet completed the survey. If you have not already done so, please take a few minutes today to provide your feedback to the IRS. Your responses are critical to IRS efforts to enhance the resources available to tax professionals.

For your convenience, the survey can be completed either online or by using the attached paper survey. If you are completing the paper survey, please use the postage-paid reply envelope to return your completed survey by [insert date]. If you choose to complete it online, you can access the survey from any computer by copying this Internet address into your browser:

www.pubs2012business.com

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

PASSWORD [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. Fors Marsh Group will not share these passwords with the IRS at any time during or after this study. Fors Marsh Group 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. Your responses will be reported to the IRS only in aggregate with the responses from other businesses.

The survey should take about 15 minutes to complete. While your participation is voluntary, we strongly encourage you to complete the survey. If you have any questions or concerns about the survey process, please call us toll-free at 1-800-521-7177, or email us at irssurveyhelp@forsmarshgroup.com.

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