



[BEGIN IN THE LANGUAGE RESPONDENT ANSWERS THE PHONE IN. IF UNSURE, BEGIN IN ENGLISH. INTERVIEW MUST BE CONDUCTED IN RESPONDENT'S LANGUAGE OF CHOICE. IF UNSURE, ASK THEM TO SPECIFY. IF AT ANY TIME IN THE SURVEY A RESPONDENT PAUSES, YOU CAN SAY: "If you are unfamiliar with this, let me know and we can move on."]

BASE: ALL

- S1. (RECORD LANGUAGE PREFERENCE FOR INTERVIEW)
1. Spanish
 2. English

BASE: ALL

S2. Hello, my name is _____. Today we are conducting a survey about how people use technology and taxes, and I would like to ask you some questions. Let me assure you we are NOT selling anything. We are only interested in your opinions. Your opinions will be kept private to the extent allowed by the law. Your responses will be grouped with others' responses and shared as part of a summary.

Your participation in this survey is voluntary, and we estimate that it will take you approximately 20 minutes to complete the survey.

For analysis purposes, are you of Hispanic or Latino origin (ethnicity)?

INTERVIEWER: DO NOT READ LIST. SELECT ONLY ONE RESPONSE.

1. Yes
2. No

If participant answers 'Don't know' or Refuses to answer the question, skip the next question

What is your race? Please select one or more. Are you...

(INTERVIEWER: READ LIST. SELECT ALL THAT APPLY).

1. 1. White
2. 2. Black or African American
3. 3. Asian
4. 4. Native Hawaiian or other Pacific Islander
5. 5. American Indian or Alaskan Native



ref (DO NOT READ) Refused

dk (DO NOT READ) Don't know

IF S2=2/3/4 THEN TERMINATE ELSE CONTINUE

BASE: ALL

S3. (RECORD GENDER – ONLY ASK IF UNSURE)

1. Male
2. Female

BASE: ALL

S4. Please tell me your current age.

_____ years old

IF S4<18 OR IF S4 IS 'REFUSED' OR 'DK' THEN TERMINATE ELSE CONTINUE

BASE: ALL

S5. What language do you speak most often at home? (Select one)

1. Spanish all the time
2. Spanish more than English
3. Spanish and English equally
4. English more than Spanish
5. English all the time
6. Don't know (DO NOT READ)
7. Refused (DO NOT READ)

BASE: ALL

S6. How many active cell phones do you personally have? By "active," we mean phones with a current contract or prepaid service plan that you or someone else currently pays for. (Select one, do not read)

1. None
2. 1
3. 2
4. 3 or more



5. Refused

IF S6=1/5 THEN SKIP TO S8 ELSE CONTINUE

BASE: S6=2/3/4

S7. Is your primary cell phone a "Smartphone"? (Select one, do not read)

1. Yes
2. No
3. Not sure
4. Refused

BASE: ALL

S8. How often do you go online on a computer (including weekdays and weekends)? This includes access from home, work, or elsewhere to the Internet. (Select one)

1. Never
2. Less than monthly
3. At least monthly
4. At least weekly
5. At least daily
6. Several times day
7. Refused (DO NOT READ)

IF S8=1/7 THEN SKIP TO S11 ELSE CONTINUE

BASE: S8=2/3/4/5/6

S9. Where do you go online? (Select all that apply)

ROTATE

- a. Home
- b. Work
- c. School
- d. Restaurant/coffee shop
- e. Library
- f. Internet café
- g. Hotel
- h. Friend or relative's house
- i. Outdoors
- j. Airport
- k. Somewhere else
- l. Refused (DO NOT READ)

ANCHOR

ANCHOR



BASE: S8=2/3/4/5/6

S10. What type of Internet connection do you usually use at home? (Select one)

1. I don't have an internet connection at home
2. Dial-up modem
3. Fiber (e.g., Verizon FiOS, AT&T U-Verse)
4. DSL from your cellular provider (do not include WiFi)
5. Satellite
6. Cable
7. Mobile broadband (e.g., Clearwire, or USB modem)
8. A broadband connection, but I don't know which kind
9. Other
10. Don't know (DO NOT READ)
11. Refused (DO NOT READ)

BASE: ALL

S11. Have you filed a Federal income tax return at least once in the last three years? (Select one, do not read)

1. Yes
2. No
3. Don't know
4. Refused

INTERVIEWER TO READ: The next few questions are about possible problems that you may be facing related to filing or payment of your federal taxes. Your personal responses will remain anonymous and will not be shared with anyone, including the IRS. Your answers will be analyzed **ONLY** in combination with those of thousands of other respondents.

BASE: ALL

Q1. Are you aware that there is a specific department of the IRS, besides customer service, which handles taxpayer problems? (Select one, do not read)

1. Yes
2. No
3. Not sure
4. Refused

IF Q1=2/3/4 THEN SKIP TO Q3 ELSE CONTINUE

BASE: Q1=1



Q2. Do you know what the department, other than customer service, specifically responsible for taxpayer problems is named? (Select one, read)

ROTATE

1. Taxpayer Assistance Center
2. Taxpayer Advocate Service
3. Problem Resolution Center
4. Office of Taxpayer Solutions
5. Not sure **ANCHOR**
6. Refused (DO NOT READ) **ANCHOR**

BASE: ALL

Q3. Have you received correspondence from the IRS within the last three years? (Select one, do not read)

1. Yes
2. No
3. Not sure
4. Refused

IF Q3=1 THEN CONTINUE ELSE SKIP TO Q6

BASE: Q3=1

Q4. What action did you take first when you received your most recent correspondence from the IRS? (Select one, prompt as needed)

ROTATE

1. Called the IRS's toll-free customer service line
2. Put the correspondence aside or ignored it
3. Called the phone number on the correspondence
4. Contacted my tax preparer
5. Replied to the IRS via the correspondence address
6. Contacted a family member/friend
7. Visited an IRS office
8. Went to the IRS web site
9. Other **ANCHOR**
10. Refused (DO NOT READ) **ANCHOR**



BASE: Q3=1

Q5. If the correspondence was regarding an issue requiring further action, how long did it take to resolve this issue? (Select one, prompt as needed)

1. Less than one month
2. 1 to 3 months
3. 4 to 6 months
4. 7 to 11 months
5. 1 to 2 years
6. More than 2 years
7. Still needs to be resolved
8. Don't know (DO NOT READ)
9. Refused (DO NOT READ)

BASE: ALL

Q6. Please indicate if in the past year you have experienced any of the following in meeting your Federal tax obligations?: (Select all that apply)

- a. Experiencing economic harm or about to suffer economic harm
- b. Facing an immediate threat of adverse action
- c. Incurring significant costs if relief is not granted (including professional representation fees)
- d. Suffering irreparable injury or long term adverse impact if relief is not granted
- e. Experiencing a delay of more than 30 days to solve a tax account problem
- f. Not receiving a response or resolution to an IRS problem by the date promised
- g. A system or procedure at the IRS either failed to operate as intended, or failed to resolve your problem or dispute within the IRS
- h. The manner in which tax laws are administered raised considerations of equity, or impaired or will impair your rights as a taxpayer
- i. Refused (DO NOT READ) **EXCLUSIVE**

INTERVIEWER TO READ: The Taxpayer Advocate Service (TAS) is Your Voice at the IRS. Their job is to ensure that every taxpayer is treated equally and fairly, and that you know and understand your rights. They offer free help to guide you through the often-confusing process of resolving your tax problems that you have not been able to solve on your own. Once you are referred to TAS, you are assigned a caseworker who will personally see the problem through until it is resolved. Assistance in Spanish is available.

BASE: ALL



Q7. Have you ever used the Taxpayer Advocate Service (TAS)? (Select one, read)

1. Yes, I have used this service within the last year
2. Yes, I have used this service in the past
3. No, I have not used this service
4. Refused (DO NOT READ)

BASE: ALL

Q8. Knowing what we've told you about TAS and its mission to help taxpayers resolve their tax problems:

A) Do you feel more positive about the IRS in general because an organization like TAS exists within it? (Select one, do not read)

1. Yes
2. No
3. Not sure
4. Refused

B) Do you feel more positive about TAS in general? (Select one, do not read)

1. Yes
2. No
3. Not sure
4. Refused

BASE: ALL

Q9. Based on the description we read to you about TAS, how likely would you say you would be to use it? (Select one, read)

1. Very Likely
2. Somewhat Likely
3. Neither Likely Nor Unlikely
4. Not Very Likely
5. Not At All Likely
6. Refused (DO NOT READ)

BASE: ALL

Q10. In the last three years, have you, or any member of your household, encountered any problem with the IRS related to filing or payment of Federal income taxes? (Select one, do not read)



1. Yes
2. No
3. Not sure
4. Refused

IF Q10=1 THEN CONTINUE ELSE SKIP TO Q13

BASE: Q10=1

Q11. Have you contacted or has a professional ever helped you contact the IRS for help with this problem? (Select one, do not read)

1. Yes
2. No
3. Not sure
4. Refused

BASE: Q10=1

Q12. About how long ago did the most recent problem you had with the IRS (related to filing or payment of taxes) occur? (Select one, prompt as needed)

1. Within the past year
2. 1 to 2 years ago
3. More than 2 years ago
4. Not sure (DO NOT READ)
5. Refused (DO NOT READ)

INTERVIEWER TO READ: Next we would like to ask about your attitudes towards filing taxes in general.

BASE: ALL

Q13. Please indicate how strongly you agree or disagree with each of the following statements about the IRS. (Select one for each row)

Please use a scale of 1 to 5, with 1 being 'strongly disagree' and 5 being 'strongly agree'.

ROWS

- I generally trust the IRS and how it would handle a tax problem
- I generally trust the IRS, but worry about how it would handle a tax problem
- I generally do not trust the IRS and how it would handle a tax problem



I generally do not trust the IRS, but do trust how it would handle a tax problem

COLUMNS

- 5 – Strongly agree
 - 4 - Agree
 - 3 – Neither agree nor disagree
 - 2 - Disagree
 - 1 – Strongly disagree
-
- 9 – Refused

BASE: ALL

Q14. As a taxpayer, do you believe you have rights before the IRS? (Select one, do not read)

- 1. Yes
- 2. No
- 3. Not sure
- 4. Refused

BASE: ALL

Q15. Do you know what your rights are as a taxpayer when dealing with the IRS? (Select one, do not read)

- 1. Yes
- 2. No
- 3. Not sure
- 4. Refused

BASE: ALL

Q16. Have you ever heard of Publication 1, which defines your rights as a taxpayer? (Select one, do not read)

- 1. Yes
- 2. No
- 3. Not sure
- 4. Refused

BASE: ALL



Q17. Do you think the tax laws should include a “Bill of Rights” that clearly defines your rights as a taxpayer? (Select one, do not read)

1. Yes
2. No
3. Not sure
4. Refused

BASE: ALL

Q18. How would you like to learn about your rights as a taxpayer? (Select all that apply)

- a. I don't want to learn about my rights as a taxpayer **EXCLUSIVE**
- b. In a separate publication I could order by phone or get on the IRS web site
- c. In a separate letter included with IRS notices
- d. In a page on the IRS web site
- e. On the home page of the IRS web site
- f. Not sure (DO NOT READ)
- g. Refused (DO NOT READ)

BASE: ALL

Q19. Do you know what your responsibilities are as a taxpayer? (Select one, do not read)

1. Yes
2. No
3. Not sure
4. Refused

BASE: ALL

Q20. How would you like to learn about your responsibilities as a taxpayer? (Select all that apply)

- a. I don't want to learn about my responsibilities as a taxpayer **EXCLUSIVE**
- b. In a separate publication I could order by phone or get on the IRS web site
- c. In a separate letter included with IRS notices
- d. In a page on the IRS web site
- e. On the home page of the IRS web site
- f. Not sure (DO NOT READ)



g. Refused (DO NOT READ)

INTERVIEWER TO READ: Next we would like to ask you about preparing and filing your taxes.

BASE: ALL

Q21. Which filing method did you use for your Federal Tax Return last year: (Select one, read)

1. Did not file
2. Filed on paper
3. Filed electronically
4. Not sure (DO NOT READ)
5. Refused (DO NOT READ)

IF Q21=1 THEN SKIP TO Q30 ELSE CONTINUE

BASE: Q21=2/3/4/5

Q22. Who prepared your Federal Tax Return last year? (Select one, read)

1. You, a friend, or family member
2. A free tax preparation service staffed by trained volunteers (e.g., VITA)
3. An attorney, a CPA or enrolled agent
4. A paid tax return preparer other than an attorney, CPA or enrolled agent
5. Other
6. Refused (DO NOT READ)

IF Q22=1/6 THEN CONTINUE

IF Q22=2 THEN SKIP TO Q27

IF Q22=3 THEN SKIP TO Q24

IF Q22=4 THEN SKIP TO Q24

IF Q22=5 THEN SKIP TO Q29

BASE: Q22=1/6

Q23. Did you use one of the following preparation methods? (Select one, read)

1. Computer Software
2. IRS Free File online software
3. Other online software program
4. None of these
5. Not sure (DO NOT READ)
6. Refused (DO NOT READ)



RESPONDENTS FROM Q23 (REGARDLESS OF ANSWER IN Q23) SKIP TO Q29

BASE: Q22=3/4

Q24. If the IRS has questions about your return, does your tax preparer answer them, or do you answer questions from the IRS yourself? (Select one, read)

1. My preparer answers IRS questions
2. I answer IRS questions
3. Not sure (DO NOT READ)
4. Refused (DO NOT READ)

BASE: Q22=3/4

Q25. Paid tax return preparers are required to give their tax preparer identification number (PTIN) when signing your tax return. Did your tax preparer provide this last year? (Select one, do not read)

1. Yes
2. No
3. Not sure
4. Refused

BASE: Q22=3/4

Q26. Did your tax preparer sign your tax return last year? (Select one, do not read)

1. Yes
2. No
3. Not sure
4. Refused

BASE: Q22=2/3/4

Q27. Did your tax preparer give you a copy of your tax return last year? (Select one, do not read)

1. Yes
2. No
3. Not sure
4. Refused



BASE: Q22=2/3/4

Q28. Why did you choose the tax preparer that you used for your Federal Tax Return last year?
(Select all that apply)

ROTATE

- a. They were same tax preparer I've used before
- b. They promised to get me a larger refund
- c. They were referred to me by a friend/family member
- d. They were an attorney, CPA or enrolled agent
- e. They charged the least to prepare my taxes
- f. They promised to get my refund quicker
- g. Other **ANCHOR**
- h. Refused (DO NOT READ) **ANCHOR**

BASE: Q21=2/3/4/5

Q29. Which filing status did you use for your Federal Tax Return last year? (Select one, read)

- 1. Single
- 2. Married-filing jointly
- 3. Married-filing separately
- 4. Head of household
- 5. Surviving spouse (qualifying widow/widower)
- 6. Not sure (DO NOT READ)
- 7. Refused (DO NOT READ)

INTERVIEWER TO READ: Finally, we would like to ask you some questions about your personal situation that could relate to your filing or payment of Federal taxes.

BASE: ALL

Q30. Please indicate if in the past year you have experienced any of the following in meeting your Federal tax obligations? (Select all that apply)

- a. A problem with the IRS is causing financial difficulties for me, my family or my business (e.g., eviction, foreclosure, wages garnished)
- b. I am facing, or my business is facing an immediate threat of financial harm (e.g., a levy against your bank account, seizure of your property)



- c. I have tried repeatedly to contact the IRS, but no one has responded
- d. I have contacted the IRS, but no one has responded by the date promised
- e. More than a month has passed, and the IRS still has not resolved my problem
- f. An IRS system, procedure, or process is not working and did not resolve my problem
- g. The tax laws are being carried out in a way that is not fair to my situation
- h. I am facing significant costs if I don't get help with my tax problem
- i. My life will be harmfully impacted over the long term if I don't get relief from my tax problem
- j. Refused (DO NOT READ) **EXCLUSIVE**

BASE: ALL

Q31. Have you experienced any of the following major life events in the last three years?
(Select all that apply)

- a. Marriage of a child
- b. Marriage to your spouse
- c. Loss of a spouse
- d. Loss of some other loved one
- e. Inheriting money or property
- f. Loss of a job or business
- g. Birth of a child
- h. Birth of a grandchild
- i. Loss of major personal property due to natural disaster or fire
- j. Identity theft
- k. Illness -- you or a family member experiencing a long hospital stay
- l. Large losses in investments
- m. Retirement
- n. Divorce
- o. Other
- p. None **EXCLUSIVE**
- q. Refused (DO NOT READ) **EXCLUSIVE**

IF Q31 (NONE) IS INDICATED THEN SKIP TO Q33 ELSE CONTINUE

BASE: Q31 IS NOT EQUAL TO 'NONE'

Q32. Did this major life event(s) in any way lead to any of the following types of situations for you personally? (Select all that apply)



- a. Not being able to afford housing
- b. Not being able to pay taxes
- c. Not being able to afford medical insurance
- d. Loss of financial resources
- e. Not being able to afford car payments
- f. Not being able to afford day care
- g. Not being able to afford food for you or your family
- h. Other
- r. None **EXCLUSIVE**
- s. Refused (DO NOT READ) **EXCLUSIVE**

BASE: ALL

Q33. Do you currently have health insurance? (Select one, do not read)

- 1. Yes
- 2. No
- 3. Not sure
- 4. Refused

IF Q33=1 THEN CONTINUE
IF Q33=2 THEN SKIP TO Q35
IF Q33=3 THEN SKIP TO Q35
IF Q33=4 THEN SKIP TO Q35

BASE: Q33=1

Q34. How did you obtain your health insurance? (Select all that apply)

ROTATE

- a. Through your employer
- b. You purchased your insurance directly from an insurance company
- c. Through a union, trade association or similar organization you belong to
- d. You have Medicare or Medicaid
- e. Other **ANCHOR**
- f. Not sure (DO NOT READ) **ANCHOR**
- g. Refused (DO NOT READ) **ANCHOR**

BASE: ALL

Q35. Do you own or operate your own business? (Select one, do not read)

- 1. Yes
- 2. No

3. Refused

IF Q35=2/3 THEN SKIP TO D1 ELSE CONTINUE

BASE: Q35=1

Q36. How many employees (excluding yourself) does your business have? (Select one, prompt as needed)

1. No employees
2. 1-5 employees
3. 6-10 employees
4. 11-49 employees
5. 50 or more employees
6. Refused (DO NOT READ)

IF Q36=1 THEN SKIP TO Q38 ELSE CONTINUE

BASE: Q36=2/3/4/5/6

Q37. Do you offer health insurance to your employees? (Select one, do not read)

1. Yes
2. No
3. Not sure
4. Refused

BASE: Q35=1

Q38. Over the next year, do you expect your business to...? (Select one, read)

1. Become larger
2. Become smaller
3. Stay about the same size
4. Cease operation
5. Not sure
6. Refused (DO NOT READ)

INTERVIEWER TO READ: Just a couple of final questions and then we are done!

BASE: ALL

D1. Which of the following best describes your current employment status? (Select one, prompt as needed)



1. Student part-time
2. Student full-time
3. Employed part-time
4. Employed full-time
5. Retired
6. Not employed
7. Unable to work/disabled
8. Refused (DO NOT READ)

BASE: ALL

D2. What is the highest level of education you have completed? (Select one, prompt as needed)

1. Some high school or less
2. High school graduate
3. Some college – no degree
4. 2-year college/technical degree
5. 4-year college degree
6. Post-graduate degree
7. Refused (DO NOT READ)

BASE: ALL

D3. How many people live in your household? (Select one, prompt as needed)

1. One
2. Two
3. Three
4. Four
5. Five or more
6. Refused (DO NOT READ)

BASE: ALL

D4. Which of the following best describes your current marital status? (Select one, prompt as needed)

1. Single and living alone
2. Single and living with others
3. Living with a partner and married to him/her
4. Living with a partner and not married to him/her
5. Widowed, divorced or separated and living alone



6. Widowed, divorced or separated and living with others (not a partner)
7. Other
8. Refused (DO NOT READ)

BASE: ALL

D5. Are you a parent/step-parent? (Select all that apply)

- a. I am not a parent/step-parent **EXCLUSIVE**
- b. I'm a parent/step-parent of a child under 18 who does live with me
- c. I am a parent/step-parent of a child under 18 who does not live with me
- d. I'm a parent/step-parent of a child age 18 or older who does live with me
- e. I am a parent/step-parent of a child age 18 or older who does not live with me
- f. Refused (DO NOT READ) **EXCLUSIVE**

IF D5=B THEN CONTINUE ELSE SKIP TO D7

BASE: D5=B

D6. What are the ages of the children living in your household? (Select all that apply)

- a. Under 6 months old
- b. 6 months to under 12 months old
- c. 1 to 2 years old
- d. 3 to 4 years old
- e. 5 to 6 years old
- f. 7 to 12 years old
- g. 13 to 17 years old
- h. Refused (DO NOT READ) **EXCLUSIVE**

BASE: ALL

D7. What range best describes the total combined annual income of all members of your household? (Select one, prompt as needed)

1. Under \$20,000
2. \$20,000 - \$24,999
3. \$25,000 - \$29,999
4. \$30,000 - \$34,999
5. \$35,000 - \$39,999
6. \$40,000 - \$44,999
7. \$45,000 - \$49,999
8. \$50,000 - \$54,999
9. \$55,000 - \$59,999



- 10. \$60,000 - \$64,999
- 11. \$65,000 - \$69,999
- 12. \$70,000 - \$74,999
- 13. \$75,000 - \$79,999
- 14. \$80,000 - \$84,999
- 15. \$85,000 - \$89,999
- 16. \$90,000 - \$94,999
- 17. \$95,000 - \$99,999
- 18. \$100,000 - \$124,999
- 19. \$125,000 - \$149,999
- 20. \$150,000 - \$174,999
- 21. \$175,000 - \$199,999
- 22. \$200,000 - \$249,999
- 23. \$250,000 - \$299,999
- 24. \$300,000 or more
- 25. Refused (DO NOT READ)

BASE: ALL

D8. We have approval to conduct this survey from the Office of Management and Budget, control number 1545-1432. I also have a statement I can read to you if you would like to hear about the Paperwork Reduction Act or if you would like me to provide an address that you can write to with comments about this survey.

Paperwork Reduction Act
<p>We are required by law to report to you the OMB Control Number for this public information request. That number is 1545-1432. If you have any comments about the time estimate for completing the survey or about ways to improve the survey, please write to the:</p> <p>Internal Revenue Service, Tax Products Coordinating Committee, SE:W: CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224.</p>