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Based on your e-Rewards(R) profile, you are invited to earn e-Rewards Currency for participating in a research survey. If you qualify and complete the survey:

Full reward amount: \$XXXX in e-Rewards Currency

Full survey length: approximately XX minutes

To complete the survey and earn e-Rewards Currency, simply click the link below, or copy the URL into your browser:

<http://<%website%>/pro.do?FT=<%uniqueid%>>

Important: This survey may or may not be compatible with smartphones or other mobile devices, so please use your desktop or laptop computer to complete this survey. If you find that your device isn't compatible with a survey, please re-try your invitation link using your desktop or laptop computer.

We encourage you to respond quickly -- this e-Rewards invitation will be available only until a predetermined number of responses have been received. Please Note: you will only receive e-Rewards credit for taking the survey once.

Continue to check your inbox and your Member home page for future opportunities to earn e-Rewards Currency.

Sincerely,  
The e-Rewards Team

## W&I Taxpayer Experience Survey 2013

In an effort to improve its services, The Internal Revenue Service (IRS) is asking customers about their experiences and opinions. Your responses assist the IRS to reduce the burden on the average taxpayer in preparing and filing taxes and to identify ways to improve the level of service IRS provides to taxpayers.

The survey takes about 20 minutes to complete. This is an opinion survey about YOUR experiences in preparing and filing your taxes. Please complete the questions even if you used a tax professional to help prepare your return(s). We need input from a cross-section of individual taxpayers to get a true picture of what Americans think, not just what "experts" say.

This survey is conducted for the IRS by an independent national research organization, Research Now. Your answers are anonymous and no personal identifying information will be released to the IRS. If you have any questions about this survey, please contact Research Now Panel Relations at (xxx) xxx-xxxx.

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 contact the Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224.

Thank you in advance for your participation!

### **[SHOW IF XLANG=7 (MISSING VALUE FOR XLANG)]**

S1-intro: First, we would like to ask you a question about the language or languages you speak.

### **[SC, IF XLANG=7]**

S1: What language do you *usually* speak at home?

- 1 Only Spanish
- 2 More Spanish than English
- 3 Both Spanish and English equally
- 4 More English than Spanish
- 5 Only English
- 6 Neither Spanish nor English

### **Data Only [single punch]**

DOV\_S1 – Language *usually* spoken at home - aggregate of XLANG and S1

**[INSTRUCTIONS: If XLANG=1-6 then DOV\_S1=XLANG. If XLANG=7 then DOV\_S1=S1. If XLANG=8 then DOV\_S1=8]**

- 1 Only Spanish
- 2 More Spanish than English
- 3 Both Spanish and English equally
- 4 More English than Spanish
- 5 Only English
- 6 Neither Spanish nor English

- 7 Hispanics who have not taken Hispanic profile; re-ask in field
- 8 Non-Hispanic

**[PROGRAMMING: ENSURE CORRECT LANGUAGE OFFERED TO RESPONDENTS BASED ON PANEL DATA]**

- 1 English
- 2 Spanish

**[SC,IF XSPANISH=2]**

S1e. Would you say you can carry on a **conversation** in English, both understanding and speaking, very well, well, not well, or not at all?

- 1 Very well
- 2 Well
- 3 Not well
- 4 Not at all

**[SC,IF XSPANISH=2]**

S1f. Would you say you can **read** a newspaper or book in English-- very well, well, not well, or not at all?

- 1 Very well
- 2 Well
- 3 Not well
- 4 Not at all

**[PROGRAMMING: If S1e=3 or 4, or S1f=3 or 4 CONTINUE. OTHERWISE, TERMINATE]**

**[SC, PROMPT, TERMINATE IF SKIPPED]**

S1a. Did you or your spouse file a Federal Income Tax Return in 2013 for income earned in 2012?

- 1 Yes, I or my spouse filed federal tax return
- 2 No federal income tax return filed for 2012 taxes
- 3 Not sure/Refused

**[SC, IF S1A = 2, 3, PROMPT, TERMINATE IF SKIPPED]**

S1c. Did you *not* file a federal income tax return in 2013 for 2012 taxes because you....

- 1 Got an extension
- 2 Were under the income limit for filing
- 3 Were a dependent of someone outside the household
- 4 Something else (Specify)\_\_\_\_\_
- 5 Not sure
- 6 Did file federal tax return

**[IF S1C IN 1-5, TERMINATE]**

**[SC, PROMPT, TERMINATE IF SKIPPED]**

S2. Would you say that you are the adult in your household who is most familiar with the preparation and filing of your 2012 federal income tax return **[IF XSPANISH = 2 ‘and your preferred language is Spanish’]**?

- 1 Yes, most familiar

- 2 Equally familiar
- 3 Not most/equally familiar [**TERMINATE**]

**[SC, PROMPT, TERMINATE IF SKIPPED]**

- S3. Who **prepared** your taxes?
- 1 I (myself)
  - 2 A friend or family member (relative)
  - 3 The IRS
  - 4 A volunteer preparer from a community organization (*do not count* tax software company promotional events)
  - 5 An independent accountant/CPA
  - 6 H&R Block
  - 7 Jackson Hewitt
  - 8 Other paid professional [**IF XSPANISH = 2, SHOW ‘Notario’**]
  - 9 Someone else
  - 10 Don’t Know [**TERMINATE**]

**[SC, PROMPT, TERMINATE IF SKIPPED]**

- S4. Which of the following is the **filing status** you used on your 2012 tax return?
- 1 Single
  - 2 Married, filing jointly
  - 3 Married, filing separately
  - 4 Head of Household (single with dependent parent or child)
  - 5 Qualifying widow(er) with dependent child
  - 6 Don’t Know [**TERMINATE**]

**[SC, GRID]**

S6a. Which of the following form and schedules were filed with your 2012 return? Did you file a:

		1—Yes	2—No	3—Don’t
Know				
	<b>1</b> Schedule A for itemized deductions including home mortgage deductions, charitable contributions, and other types of deductions			
	<b>2</b> Schedule B for interest and dividend income			
	<b>3</b> Schedule C for small business income			
	<b>4</b> Schedule D for capital gains or losses			
	<b>5</b> Schedule E for supplemental income, such as rental income, royalties, and trusts			
	<b>6</b> Schedule F for farm income			
	<b>7</b> Form 2106 employee business expenses			
	<b>8</b> Forms related to partnerships or S Corp [ <b>TERMINATE IF SELECTED</b> ]			
	<b>9</b> NONE			

## **I. AWARENESS AND IRS INTERACTIONS IN PAST 12 MONTHS**

### **AWARENESS**

#### **[SC, GRID]**

Q1a. The following questions are about your awareness of different ways to contact the IRS.

Are you **aware** that you can get information or help such as obtaining forms or tax law information, checking refund status or getting help to resolve a notice from the IRS in the following ways . . .

1—Yes 2—No

- 1 Calling an IRS Toll-Free line?
- 2 Visiting a local IRS office (Taxpayer Assistance Center, walk-in center)?
- 3 Visiting the IRS website (www.irs.gov)?
- 4 Sending regular mail to the IRS?
- 5 E-mailing the IRS?
- 6 Getting help from a volunteer tax preparer from a community organization?
- 7 Using IRS2Go App (for smartphone or tablet mobile device)

#### **[SC, GRID]**

Q1a.a Are you aware that the IRS provides some general tax information via the following social media channels

1—Yes 2—No

- 1 IRS videos on YouTube
- 2 IRS tweets on Twitter
- 3 IRS posts on Facebook

Q1a.b (Show YES items in Q1a.a) Have you looked for general tax information via the following social media channels provided by the IRS?

1—Yes 2—No

- 1 IRS videos on YouTube
- 2 IRS tweets on Twitter
- 3 IRS posts on Facebook

#### **[SC, GRID, IF Q1A\_3=YES, AWARE OF IRS.GOV]**

Q1a.1 Which of the following irs.gov (online) services/tools are you **aware** of?

1—Yes 2—No

##### **[PROGRAMMER: Rotate list...]**

- 1 Electronic Federal Tax Payment System (EFTPS) (a system that allows taxpayers to transmit regular tax payments electronically)
- 2 Electronic Filing PIN Request (to get a PIN to use to “sign” your tax return when you file it electronically)
- 3 Interactive Tax Assistant (ITA) (which helps you answer a question like “How many exemptions can I claim?” by asking you a series of questions that guide you to a response tailored to your situation)
- 4 IRS Withholding Calculator (a tool that helps you determine the number of withholdings you ask your employer to take on your W-4)
- 5 Online Employer Identification Number (EIN)
- 6 Online Payment Agreement (OPA)
- 1 7 Tax Exempt Charity Search
- 8 Tax Trails (another system which helps you answer a question like “Do I qualify for a filing extension” by asking you a series of questions that guide you to a response tailored to your situation)

- 8 Where's My Refund
  - 9 Where's My Amended Return
  - 10 Transcripts or prior year tax return info
- I am *not* aware of any of these tools **[PROGRAMMER: KEEP THIS OPTION AT THE END OF THE LIST]**

**[SC, GRID, IF XSPANISH = 2]**

Q1b. Are you **aware** that you can get information or help such as finding forms or tax law information, checking refund status or getting help resolve a notice from the IRS in the following ways in Spanish?

1—Yes 2—No

- 1 Calling an IRS Toll-Free line and getting assistance in Spanish?
- 2 Visiting a local IRS office (Taxpayer Assistance Center, walk-in center) and getting assistance in Spanish?
- 3 Visiting the Español section of the IRS website?
- 4 Sending regular mail to the IRS in Spanish?
- 5 Spanish speaking volunteer preparers from a community organization?

**[SC, IF XSPANISH = 2]**

Q1b.1 Are you aware that the IRS provides some general tax information in Spanish via the following social media channels

1—Yes 2—No

- 1 IRS Videos on YouTube?
- 2 Telemundo?
- 3 Univision?

**[SC, IF XSPANISH = 2]**

Q5s1. **Were you aware** there is a “Where’s My Refund” section in Spanish on the IRS website?

- 1 Yes
- 2 No

**INTRO1 [IF A “YES” RESPONSE TO Q1A\_A THRU Q1A\_E OR YES TO Q1B\_A THRU Q1B\_D, DISPLAY]**

The next questions are about **any** contact you may have had with the Internal Revenue Service (IRS) in the *past 12 months*, including actively using the IRS website to obtain information. **[IF XSPANISH = 2: ‘Please include all contacts regardless of whether they were in Spanish or English’]**

**[IF A “YES” RESPONSE TO Q1A\_A THRU Q1A\_E OR YES TO Q1B\_A THRU Q1B\_D, SC, GRID]**

Q2. In the *past 12 months*, did you contact the IRS for any reason, using any of the following methods: Select one answer from each row in the grid

1—Yes 2—No

- 2a **[ASK IF Q1A\_A=YES OR Q1B\_A=YES]** Call an IRS Toll-Free line
- 2b **[ASK IF Q1A\_B=YES OR Q1B\_B=YES]** Visit a local IRS office (Taxpayer Assistance Center, walk-in center)
- 2c **[ASK IF Q1A\_C=YES OR Q1B\_C=YES]** Actively visit the IRS website to obtain information. Please do not count casual browsing.
- 2d **[ASK IF Q1A\_D=YES OR Q1B\_D=YES]** Contact the IRS through regular mail
- 2e **[ASK IF Q1A\_E=YES]** Email the IRS
- 2f **[ASK IF Q1A\_F=YES OR Q1B\_E=YES]** Get help from a volunteer tax preparer from a community organization

2g [ASK IF Q1A\_F=YES] Use IRS2Go App (for smartphone or tablet mobile device)

**CHANNEL EXPERIENCE**

**Toll –Free Section**

[IF Q2A = YES; MC/NUM, GRID, RANGE 01-99; Else, skip to Q4a]

[PUT WORDS HIGHLIGHTED BELOW IN BOLD YELLOW TEXT IN SURVEY]

Q3a/3b. For which of the following reasons did you call the Toll-Free line in the *past 12 months*, and for each issue mentioned, how many *times* did you call **Toll-Free** for this issue?

Issue	# Times
1. Get a <b>form or publication</b>	_____
2. Obtain transcripts or <b>prior year tax return information</b>	_____
3. Get help with <b>tax law</b> while <b>preparing</b> my return such as information on withholding, dependents, deductions, or tax credits	_____
4. Get <b>tax return preparation help</b> such as which forms to file, record keeping, filling out forms, how to file or how to get more help	_____
5. Get <b>information</b> or assistance about an <b>IRS notice</b> — notices are mailed letters about issues such as balance dues, overpayments, underpayments, information about tax credits or requests for more information	_____
6. Get <b>tax law</b> information <b>after filing</b> my tax return to help me clarify the tax process or remain/become compliant such as information about estimated taxes (do <i>not</i> count contacts about IRS notices)	_____
7. Get <b>information</b> about making <b>payments</b>	_____
8. Get <b>information</b> about a <b>refund</b>	_____
9. Obtain <b>Individual</b> or <b>Employer Tax ID</b> (ITIN, EIN)	_____
10. Other, specify [if “Other” selected and nothing entered in blank, prompt once]	_____

[SC, IF XSPANISH = 2]

3s1. Have you called the IRS Español Toll-Free Line?

- 1 Yes (Continue)
- 2 No

a

[DISPLAY IF Q2A=YES]

For the following questions, please focus on your *most recent* contact with calling an IRS Toll-Free line. If you have had multiple contacts with the IRS Toll-Free line, please respond with the *last contact* in mind.

[IF Q2A = YES , SC]

[Should appear only when Q2A=YES. Currently appears even when respondent said didn’t contact TF]

Q3e. Did you hang up *before* speaking with an IRS representative?

- 1 Yes
- 2 No

**[IF Q3E = 1, MC]**

Q3g. What were your reasons for hanging up?

- 1 Kept getting a busy signal
- 2 Placed on hold too long
- 3 Kept getting transferred
- 4 Couldn't understand the menu system
- 5 Too many choices to listen to on the menu system
- 6 Went to irs.gov due to recorded message suggestion
- 7 Other

**[IF Q2A = YES, SC]**

Q3h. Were you transferred *more than once* when you called?

- 1 Yes
- 2 No

**[IF Q3e=2, SC]**

Q3i. How well did you **understand** the information that was provided to you?

- 1 Not at all well
- 2 Not very well
- 3 Somewhat well
- 4 Very well

**[SC, IF Q3e=2]**

Q3j. How **confident** were you in your ability to apply the information you received?

- 1 Not at all confident
- 2 Not very confident
- 3 Somewhat confident
- 4 Very confident

**[SC, IF Q2A = YES]**

Q3k1. Was your issue completely resolved during the call?

- 1 Yes
- 2 No

**[SC, IF Q3K1=2]**

Q3k2. If your issue was not completely resolved during your call, which of the following did you do **NEXT** to try to resolve your issue?

- 1 Did nothing
- 2 Visited a local IRS office (Taxpayer Assistance Center, walk-in center)
- 3 Visited the IRS website
- 4 Sent a regular mail to the IRS
- 5 E-mailed the IRS



- 6 Got help from a volunteer tax preparer from a community organization
- 7 Used IRS2Go App
- 8 Other

**[SC ,IF Q3k1 = YES]**

Q3l. For this recent interaction, how many days elapsed between when you contacted the IRS by phone until the issue was resolved?

- 1 Same day or within 24 hours
- 2 Within 7 days
- 3 8-15 days
- 4 16-29 days
- 5 30-44 days
- 6 45-60 days
- 7 Over 60 days

**[SC, IF Q2A = YES ]**

Q3m. What is a reasonable timeframe to wait for the IRS to respond to your issue by phone?

- 1 Same day, or within 24 hours
- 2 Within 7 days
- 3 8-15 days
- 4 16-29 days
- 5 30-44 days
- 6 45-60 days
- 7 Over 60 days

**[SC, IF Q2A = YES]**

Q3n. Please rate your *overall* satisfaction with your most recent interaction contacting the IRS on its Toll-Free line.

- 1 Very dissatisfied
- 2 Dissatisfied
- 3 Neither satisfied nor dissatisfied (neutral)
- 4 Satisfied
- 5 Very satisfied

**Local IRS office [PROGRAMMING: IF Q2b=YES, continue with this section]**

**[IF LOCAL = 2, GO TO Q5A, ELSE CONTINUE WITH Q4A]**

**[PUT WORDS HIGHLIGHTED BELOW IN BOLD YELLOW TEXT IN SURVEY]**

**[MC/NUM, GRID, RANGE 01-99]**

Q4a/4b. For which of the following reasons did you visit a local IRS office (Taxpayer Assistance Center, walk-in center), in the *past 12 months*, and for each issue mentioned, how many *times* did you use a **local IRS office** for this issue?

Issue		# Times
1. Get a <b>form or publication</b>		_____
2. Obtain transcripts or <b>prior year tax return information</b>		_____
3. Get help with <b>tax law</b> while <b>preparing</b> my return such as information on withholding, dependents, deductions, or tax credits		_____
4. Get <b>tax return preparation help</b> such as which forms to file, record keeping, filling out forms, how to file or how to get more help		_____ _____ _____
5. Get <b>information</b> or assistance about an <b>IRS notice</b> — notices are mailed letters about issues such as balance dues, overpayments, underpayments, information about tax credits or requests for more information		_____ _____
6. Get <b>tax law</b> information <b>after filing</b> my tax return to help me clarify the tax process or remain/become compliant such as information about estimated taxes ( <i>do not</i> count contacts about IRS notices)		_____ _____ _____
7. <b>Make a payment</b>		_____
8. Get <b>information</b> about making <b>payments</b>		_____
9. Get <b>information</b> about a <b>refund</b>		_____
10. Obtain <b>Individual</b> or <b>Employer Tax ID</b> (ITIN, EIN)		_____
11. Other, specify [if “Other” selected and nothing entered in blank, prompt once]		_____

**[DISPLAY]**

For the following questions, please focus on your *most recent* experience with visiting a local IRS office. If you visited a local IRS office multiple times, please respond with the *last visit* in mind.

**[SC]**

Q4c1. How well did you **understand** the information that was provided to you?

- 1 Not at all well
- 2 Not very well
- 3 Somewhat well
- 4 Very well

[SC]

Q4c2. How **confident** were you in your ability to apply the information you received?

- 1 Not at all confident
- 2 Not very confident
- 3 Somewhat confident
- 4 Very confident

[SC]

Q4d1. Was your issue completely resolved during your visit?

- 1 Yes
- 2 No

[SC, IF Q4D1=2]

Q4d2. If your issue was not completely resolved during your visit, which of the following did you do **NEXT** to try to resolve your issue?

- 1 Did nothing.
- 2 Called an IRS Toll-Free line
- 3 Visited the IRS website
- 4 Sent a regular mail to the IRS
- 5 E-mailed the IRS
- 6 Got help from a volunteer tax preparer from a community organization
- 7 Used IRS2Go App
- 8 Other

[SC, IF XSPANISH = 2]

Q4s1 Did you *need* assistance in Spanish when you visited a local IRS office (Taxpayer Assistance Center, walk-in center)?

- 1 Yes
- 2 No

[SC, IF Q4S1 = 1]

Q4s2 Did you receive assistance in Spanish?

- 1 Yes
- 2 No

[SC, IF Q4d1 = YES]

Qc4.1. For this recent interaction, how many days elapsed between when you contacted the IRS at a local IRS office until the issue was resolved?

- 1 Same day or within 24 hours
- 2 Within 7 days
- 3 8-15 days
- 4 16-29 days

- 5 30-44 days
- 6 45-60 days
- 7 Over 60 days

[SC]

Qc4.2. What is a reasonable timeframe to wait for the IRS to respond to your issue upon visiting a local IRS office?

- 1 Same day or within 24 hours
- 2 Within 7 days
- 3 8-15 days
- 4 16-29 days
- 5 30-44 days
- 6 45-60 days
- 7 Over 60 days

[SC]

4d. Please rate your *overall* satisfaction with your most recent visit to a local IRS office (Taxpayer Assistance Center, walk-in center).

- 1 Very dissatisfied
- 2 Dissatisfied
- 3 Neither satisfied nor dissatisfied (neutral)
- 4 Satisfied
- 5 Very satisfied

IRS website [PROGRAMMING: If Q2c=YES, continue with this section]

[IF Q2C NE 1, GO TO Q6A, ELSE CONTINUE WITH Q5A]  
 [PUT WORDS HIGHLIGHTED BELOW IN BOLD YELLOW TEXT IN SURVEY]

[MC/NUM, GRID, RANGE 01-99]

5a/5b. For which of the following reasons did you actively use the IRS website in the *past 12 months*? Please do *not* count casual browsing, and for each issue mentioned, how many *times* did you use the **IRS website** for this issue?

Issue		# Times
1. Get a <b>form or publication</b>		_____
2. Obtain transcripts or <b>prior year tax return information</b>		_____
3. Get help with <b>tax law</b> while <b>preparing</b> my return such as information on withholding, dependents, deductions, or tax credits		_____
4. Get <b>tax return preparation help</b> such as which forms to file, record keeping, filling out forms, how to file or how to get more help		_____
5. Get <b>tax law</b> information <b>after filing</b> my tax return to help me clarify the tax process or remain/become compliant such as information about estimated taxes (do <i>not</i> count contacts about IRS notices)		_____
6. <b>Make a payment</b>		_____
7. Get <b>information</b> about making <b>payments</b>		_____
8. Get <b>information</b> about a <b>refund</b>		_____
9. Obtain <b>Individual</b> or <b>Employer Tax ID</b> (ITIN, EIN)		_____
10. Other, specify [if “Other” selected and nothing entered in blank, prompt once]		_____
		_____
		_____
		_____

[SC, GRID, SHOW and ASK categories if YES in Q1a.1]

Q5c In the *past 12 months*, did you use any of the following services/tools on the IRS website?

1—Yes 2—No

- a. Electronic Federal Tax Payment System (EFTPS)
- b. Electronic Filing PIN Request
- c. Interactive Tax Assistant (ITA)
- d. IRS Withholding Calculator
- e. Online Employer Identification Number (EIN)
- f. Online Payment Agreement (OPA)
- g. Tax Exempt Charity Search
- h. Tax Trails
- i. Where's My Refund?
- j. Where's My Amended Return?
- k. Transcripts or prior year tax return info

[SC, IF XSPANISH = 2]

Q5s1A. When you used the IRS website to get information, did you use the Español section of the IRS website, the English section of the IRS website, or both?

- 1 Español only
- 2 English only
- 3 Both Español and English

**[SC, IF XSPANISH=2 AND Q5S1 = 3]**

Q5s2A. Which language section of the IRS website did you use *more*?

- 1 Español
- 2 English
- 3 About the same

**[SC, IF XSPANISH=2 AND IF Q5a\_9 = 1]**

Q5s5. How satisfied were you with the “Where’s My Refund” tool on the IRS Español website?

- 1 Very dissatisfied
- 2 Dissatisfied
- 3 Neither satisfied nor dissatisfied (neutral)
- 4 Satisfied
- 5 Very satisfied

**[MC, IF XSPANISH=2 AND Q5S1 = 2]**

Q5s7 What were the reasons you have *not* used the Español section of the IRS website?

- 1 I’m not aware of the Español section of website
- 2 I’m not aware that tax info is available in Spanish
- 3 Other (specify)\_\_\_\_\_

**[SC]**

For the following questions, please focus on your most recent experience with contacting the IRS.gov website. If you visited IRS.gov multiple times, please respond with the *last visit* in mind.

Q5e. Did you **find** the information you were looking for?

- 1 Yes
- 2 No
- 3 Partially

**[TEXT BOX, IF Q5E=NO]**

Q5e1. If you *didn’t* find what you were looking for, what specific type of information were you trying to find?  
Please specify \_\_\_\_\_

**[SC, IF Q5E=NO]**

Q5e2. If you didn’t find what you were looking for on IRS website, which of the following did you do **NEXT** to try to find the information?

- 1 Did nothing
- 2 Visited IRS.gov website again
- 3 Called an IRS Toll-Free line
- 4 Visited a local IRS office (Taxpayer Assistance Center, walk-in center)
- 5 Sent a regular mail to the IRS
- 6 E-mailed the IRS
- 7 Got help from a volunteer tax preparer from a community organization

- 8 Used IRS2Go App (for smartphones and mobile devices)
- 9 Other

**[SC, IF Q5E=1 or 3]**

Q5f1. How well did you **understand** the information?

- 1 Not at all well
- 2 Not very well
- 3 Somewhat well
- 4 Very well

**[SC, If Q5E=1 or 3]**

Q5f2. How **confident** were you in your ability to apply the information?

- 1 Not at all confident
- 2 Not very confident
- 3 Somewhat confident
- 4 Very confident

**[SC, If Q5E=1]**

Q5g1. For this recent interaction, how much time did it take for you to locate the information you were seeking?

- 1 Within 1 hour
- 2 Within 2-4 hours
- 3 Within 5-8 hours
- 4 Within 24 hours
- 5 Within 7 days
- 6 8-15 days
- 7 16-29 days
- 8 30-44 days
- 9 45-60 days
- 10 Over 60 days

**[SC]**

Q5g2. What is a reasonable amount of time to resolve your issue by visiting the IRS.gov website?

- 1 Within 1 hour
- 2 Within 2-4 hours
- 3 Within 5-8 hours
- 4 Within 24 hours
- 5 Within 7 days
- 6 8-15 days
- 7 16-29 days
- 8 30-44 days
- 9 45-60 days
- 10 Over 60 days

[SC]

Q5h. Please rate your *overall* satisfaction with your most recent visit to the IRS.gov website

- 1 Very dissatisfied
- 2 Dissatisfied
- 3 Neither satisfied nor dissatisfied (neutral)
- 4 Satisfied
- 5 Very satisfied

[MC, ASKED OF ALL RESPONDENTS]

Q14a. *In the future*, how likely are you to perform the following tax-related activities using the IRS website ([www.irs.gov](http://www.irs.gov))? Assume that you have a need to perform each of these activities.

1=Very unlikely      2=Somewhat unlikely      3=Neither unlikely nor likely      4=Somewhat likely  
5=Very likely

- a. Get an IRS form or publication
- b. Get information about completing a tax form
- c. Find an answer to a tax law question
- d. Determine my eligibility for a tax benefit or whether certain requirements apply to me
- e. Get help making tax-related calculations
- f. Get help preparing a tax return or form
- g. File a tax return or form
- h. Set up a payment plan
- i. Make a payment
- j. Get information about a refund
- k. Respond to a notice or letter received from the IRS
- l. Getting a transcript or prior year tax return information
- m. Something else (specify) \_\_\_\_\_
- n. None – I would not complete any of these activities using the IRS website

[SC]

Q15. If you needed your *prior* year federal tax return (e.g. transcripts) and were able to review it online through a secure link on the IRS website, how **likely** would you be to use this service? Would you be . . .

- 1 Very unlikely
- 2 Somewhat unlikely
- 3 Neither unlikely nor likely
- 4 Somewhat likely
- 5 Very likely

[MC, IF Q2C = NO AND Q2B = YES]

Q13a. What are the *main* reasons you visited a local office instead of visiting the IRS website to get information from the IRS?

- 1 I don't have Internet access
- 2 I used local IRS offices before
- 3 I don't believe I can get my questions answered by using the IRS website
- 4 I did try to use the IRS website
- 5 I wasn't aware of the IRS website
- 6 The letter I received from the IRS said to go to a local office
- 7 Something else (specify)



**[MC, IF Q2C = NO AND Q2A = YES]** Q13b. What are the *main* reasons you called an IRS Toll-Free line instead of visiting the IRS website to get information from the IRS?

- 1 I don't have Internet access
- 2 I called the Toll-Free line before
- 3 I don't believe I can get my questions answered by using the IRS website
- 4 I did try to use the IRS website
- 5 I wasn't aware of the IRS website
- 6 The letter I received from the IRS said to call a telephone number
- 7 Something else (specify)

**Regular Mail [PROGRAMMING: If Q2d=YES, continue with this section]**

**[IF Q2D NE 1, GO TO Q7A, ELSE CONTINUE WITH Q6A]**

**[PUT WORDS HIGHLIGHTED BELOW IN BOLD YELLOW TEXT IN SURVEY]**

**[MC/NUM, GRID, RANGE 01-99]**

Q6a/6b. For which of the following reasons did you use regular mail to contact the IRS in the *past 12 months*, and for each issue mentioned, how many *times* did you use regular **mail** for this issue?

a. Issue		# Times
1. Get a <b>form or publication</b>		_____
2. Obtain transcripts or <b>prior year tax return information</b>		_____
3. Get help with <b>tax law</b> while <b>preparing</b> my return such as information on withholding, dependents, deductions, or tax credits		_____
4. Get <b>tax return preparation help</b> such as which forms to file, record keeping, filling out forms, how to file or how to get more help		_____ _____ _____
5. Get <b>information</b> or assistance about an <b>IRS notice</b> — notices are mailed letters about issues such as balance dues, overpayments, underpayments, information about tax credits or requests for more information		_____ _____
6. Get <b>tax law</b> information <b>after filing</b> my tax return to help me clarify the tax process or remain/become compliant such as information about estimated taxes ( <i>do not</i> count contacts about IRS notices)		_____ _____ _____
7. <b>Make a payment</b>		_____
8. Get <b>information</b> about making <b>payments</b>		_____
9. Get <b>information</b> about a <b>refund</b>		_____
10. Obtain <b>Individual</b> or <b>Employer Tax ID</b> (ITIN, EIN)		_____
11. Other, specify [if “Other” selected and nothing entered in blank, prompt once]		_____

**[DISPLAY]**

For the next two questions, please focus on the information you received through mail in response to your *most recent* mail contact with the IRS. If you have received multiple mailings from the IRS, please respond with the *last correspondence* in mind.

**[SC]**

Q6n1. How well did you **understand** the information that was provided to you by mail from the IRS?

- 1 Not at all well
- 2 Not very well
  
- 3 Somewhat well
  
- 4 Very well
  
- 5 Have not received a response from the IRS

**[SC, If Q6N1=1 to 4]**

Q6n2. How **confident** were you in your ability to apply the information you received?

- 1 Not at all confident
- 2 Not very confident
- 3 Somewhat confident
- 4 Very confident

**[SC]**

Q6c1. Was your issue completely resolved through mailing to IRS?

- 1 Yes
- 2 No
- 3 In process

**[SC, IF Q6C1=NO]**

Q6c2. If your issue was not completely resolved through mail, which of the following did you do **NEXT** to try to resolve your issue?

- 1 Did nothing
- 2 Called an IRS Toll-Free line
- 3 Visited a local IRS office (Taxpayer Assistance Center, walk-in center)
- 4 Visited the IRS website
- 5 E-mailed the IRS
- 6 Got help from a volunteer tax preparer from a community organization
- 7 Used IRS2Go App
- 8 Other

**[MC, IF Q2D = YES AND Q2A=NO, AND Q2C = NO]**

Q6c. What are the reasons that you contacted the IRS using regular mail instead of other channels such as the IRS website or an IRS Toll-Free line?

- 1 IRS required information be mailed to the agency
- 2 Am not aware that I could contact the IRS any other way
- 3 Never thought about contacting the IRS any other way
- 4 I don't have Internet access
- 5 Believe I can't get information needed from IRS website
- 6 Believe I can't get information needed from the IRS Toll-Free line
- 7 Believe I can't get information from other IRS sources
- 8 Want paper trail
- 9 Other (specify)\_\_\_\_\_

**[SC, IF Q6C1 = YES]**

Q6d1. For this recent interaction, how many days elapsed between when you sent mail to the IRS until the issue was resolved?

- 1 Same day
- 2 Within 7 days
- 3 8-15 days
- 4 16-29 days
- 5 30-44 days

- 6 45-60 days
- 7 Over 60 days

[SC]

Q6d2. What is a reasonable amount of time to resolve your issue by sending regular mail to the IRS?

- 1 Same day
- 2 Within 7 days
- 3 8-15 days
- 4 16-29 days
- 5 30-44 days
- 6 45-60 days
- 7 Over 60 days

[SC]

Q6e. Please rate your *overall* satisfaction with contacting the IRS by regular mail.

- 1 Very dissatisfied
- 2 Dissatisfied
- 3 Neither satisfied nor dissatisfied (neutral)
- 4 Satisfied
- 5 Very satisfied

Email [PROGRAMMING: IF Q2e=YES, continue with this section]

[IF Q2E NE 1, GO TO Q8 ELSE CONTINUE WITH Q7A]  
 [PUT WORDS HIGHLIGHTED BELOW IN BOLD YELLOW TEXT IN SURVEY]

[MC/NUM, GRID, RANGE 01-99]

Q7a/7b. For which of the following reasons did you send email to the IRS in the *past 12 months*, and for each issue mentioned, how many *times* did you use **email** for this issue?

a. Issue	Check if yes	# Times
1. Get help with <b>tax law</b> while <b>preparing</b> my return such as information on withholding, dependents, deductions, or tax credits 2. Get <b>tax law</b> information <b>after filing</b> my tax return to help me clarify the tax process or remain/become compliant such as information about estimated taxes ( <i>do not</i> count contacts about IRS notices) 3. Other, specify [if “Other” selected and nothing entered in blank, prompt once]		           <hr/>           <hr/>

**IRS2GO APP**

[MC, IF Q2G=YES]

Q8a. For which of the following reasons did you use IRS2Go app in the *past 12 months*

- 1 Obtain transcripts or **prior year tax return** information
- 2 Get **general tax information**
- 3 Get information about a **refund**
- 4 **Other**, specify [if “other” selected and noting entered in blank, prompt once]

[SC, IF YES TO 2A, B, C, D, OR E]

Q9. Did you contact the IRS for any *other* reasons you have *not* mentioned?

- 1 Yes
- 2 No

[TXT, IF Q9 = 1]

Q9A What other reasons? \_\_\_\_\_

[SC]

Q14b. *In the future*, how likely are you to perform the following tax-related activities using the IRS2Go App (for iPhone and Android mobile devices)? Assume that you have a need to perform each of these activities.

1=very unlikely 2=somewhat unlikely 3=neither unlikely nor likely 4=somewhat likely 5=very likely

- 1 Get an IRS form or publication
- 2 Get information about completing a tax form
- 3 Getting a transcript or prior year tax return information
- 4 Find an answer to a tax law question
- 5 Determine my eligibility for a tax benefit or whether certain requirements apply to me
- 6 Get help making tax-related calculations
- 7 Get help preparing a tax return or form
- 8 File a tax return or form
- 9 Set up a payment plan
- 10 Make a payment
- 11 Get information about a refund
- 12 Respond to a notice or letter received from the IRS
- 13 Something else (specify)\_\_\_\_\_
- 14 None – I would not complete any of these activities using IRS IRS2go app for smartphones or mobile devices

## SECTION II. EFFECTIVE CONTACT RESOLUTION

[PROGRAMMING: SKIP TO SECTION III IF Q2a thru Q2e is not yes]

[IF ALL Q2A THROUGH Q2E AND Q2G NE YES SKIP TO NEXT SECTION. ELSE CONTINUE WITH Q16]

[SC]

Q16 You mentioned that you have contacted the IRS in the *past 12 months*. Contacting the IRS includes calling an IRS Toll-Free line, visiting a local IRS office (Taxpayer Assistance Center, walk-in center), actively visiting the IRS website (*not* casual browsing), contacting the IRS through regular mail, emailing the IRS, or using the IRS2Go App. What was the *most recent* reason that you contacted the IRS in the *past 12 months*?

- 1 Get a **form or publication**
- 2 Obtain transcripts or **prior year tax return information**
- 3 Get help with **tax law** while **preparing** my return such as information on withholding, dependents, deductions, or tax credits
- 4 Get **tax return preparation help** such as which forms to file, record keeping, filling out forms, how to file or how to get more help
- 5 Get **information** or assistance about an **IRS notice** — notices are mailed letters about issues such as balance dues, overpayments, underpayments, information about tax credits or requests for more information
- 6 Get **tax law** information **after filing** my tax return to help me clarify the tax process or remain/become compliant such as information about estimated taxes (*do not* count contacts about IRS notices)
- 7 **Make a payment**
- 8 Get **information** about making **payments**
- 9 Get **information** about a **refund**
- 10 Obtain **Individual** or **Employer Tax ID** (ITIN, EIN)
- 11 Other, specify [if “Other” selected and nothing entered in blank, prompt once]

[IF NO RESPONSE SELECTED IN Q16, SKIP TO NEXT SECTION]

[PROGRAM different color for the issue selected in Q16 for Q17 thru Q22]

[SC]

Q17. Did you contact the IRS *more than once* in the *past 12 months* to get help resolving your most recent issue?

[INSERT RESPONSE FROM Q16]?

- 1 Yes
- 2 No

[IF Q17 IS SKIPPED, SKIP TO Q23]

[SC]

Q18. Thinking back to the [IF Q17 = 1 INSERT: ‘very first’] time you contacted the IRS in the *past 12 months* for [INSERT RESPONSE FROM Q16] what method did you use for contact?

- 1 IRS website
- 2 Toll-Free (telephone)

- 3 IRS office (Taxpayer Assistance Center, walk-in center)
- 4 Mail
- 5 E-mail
- 6 IRS2Go App (for smartphone or tablet mobile device)

Q18a. Why did you choose this method?

---

**[IF Q18 IS SKIPPED, SKIP TO NEXT SECTION]**

**[MC, IF Q17 = 1] programmer; only show option not selected in Q18**

Q19. Besides **[INSERT RESPONSE FROM Q18]**, what other methods did you use to contact the IRS in the *past 12 months* to get help with your most recent issue? **[INSERT RESPONSE FROM Q16]**

- 1 IRS website
- 2 Toll-Free (Telephone)
- 3 IRS office (TAC, walk-in center)
- 4 Mail
- 5 E-mail
- 6 IRS2Go App (for phone or tablet mobile device)
- 7 None **[SC]**

**[IF Q17 = 2, AUTOFILL WITH 1 AND SKIP TO Q20B. NUM 1-99]**

Q20a. Approximately, how many *times* have you contacted the IRS about this issue?

\_\_\_\_\_ times

99 Don't remember

**[SC]**

20b. When you contacted the IRS **[If yes to Q17: the very *first* time]** using [Insert response to Q18] for [Insert response to Q16], did you expect to resolve this issue with just one contact to the IRS?

- 1 Yes
- 2 No
- 3 Don't Know

**[SC]**

Q20c. You said that you made [Insert number of times from Q20a] contacts to the IRS in order to resolve your issue. After your last attempt, was your issue:

- 1 Completely resolved
- 2 Partially resolved
- 3 Not at all resolved
- 4 Still pending in the process

**[SC, GRID]**

Q20d. Did you contact any of the following *non-IRS* sources to try to resolve your issue?

- |   |   |        |
|---|---|--------|
| 1 | Contacted a tax practitioner or attorney                                  | Yes/No |
| 2 | Contacted a friend or colleague for advice                                | Yes/No |
| 3 | Contacted Taxpayer Advocate Service                                       | Yes/No |
| 4 | Went to a Non-IRS information source (e.g. book, web, tax software, etc.) | Yes/No |



**[SC, IF ANY YES TO Q20D]**

Q20e. Did your contact with non-IRS sources take place before or after you contacted the IRS?

- 1 Before
- 2 After
- 3 Both before and after (multiple contacts)

**[SC]**

Q23 How would you rate the *overall* effectiveness with which the IRS resolved your most recent reason for contacting the IRS, **[INSERT RESPONSE FROM Q16]**? Was the issue resolution process:

- 1 Not at all effective
- 2 Not very effective
- 3 Neutral
- 4 Somewhat effective
- 5 Very effective

### III. PREPARING AND COMPLETING YOUR RETURN AND FILING

[MC]

#### Tax Prep

[USE LIST FROM Q23B BELOW]

[MC]

Q23b. In the *future*, where would you prefer to get **general tax information**, including information about changes in tax laws?

- 1 IRS forms and publications
- 2 IRS website in English
- 3 IRS website in Spanish
- 4 IRS telephone contact
- 5 IRS in-person/local IRS office (Taxpayer Assistance Center, walk-in center)
- 6 IRS sponsored tax class or seminar
- 7 IRS2Go App (for iPhone and Android mobile device)
- 8 IRS (unspecified)
- 9 Accountant/tax preparer (H&R Block, Jackson Hewitt)
- 10 Employer/Union/Trade Organization
- 11 Family/Friend
- 12 Library
- 13 Media such as radio, television, or newspapers
- 14 [IF XSPANISH = 2] Notario**
- 15 Non-IRS Books and Publications
- 16 Non-IRS website
- 17 Post Office
- 18 Social/community organization (church/religious group, theaters, community centers/outreach groups, schools)
- 19 Tax preparation software (TurboTax, TaxAct, etc)
- 20 Social media
  
- 21 Other [specify]

The next questions are about completing and filing your 2012 taxes.

[SC]

Q28a Are you **aware** of the Earned Income Tax Credit (EITC/EIC)?

- 1 Yes
- 2 No

[SC, IF Q28A=1]

Q28b How did you first learn about Earned Income Tax Credit (EITC/EIC)?

- 1 Accountant/Tax preparer (H&R Block, Jackson Hewitt)

- 2 TV/Radio/newspaper/flyers
- 3 Friend/Family/Co-worker
- 4 IRS.gov or IRS publication
- 5 Tax software (e.g. TurboTax, TaxCut, TaxAct)
- 6 Social media (e.g. Facebook, Twitter, YouTube, etc.)
- 7 IRS2Go App (for smartphones or mobile tablet devices)
- 8 Other (specify)\_\_\_\_\_

**[SC, IF Q28A=1]**

**[SC, If Q28A=1]**

Q28. Did you **apply** for the Earned Income Tax Credit (EITC/EIC) when you filed your 2012 federal tax return?

- 1 Yes
- 2 No **[skip to Q26]**

**[SC, If Q28=1]**

Q28c. Did you **qualify** for Earned Income Tax Credit (EITC)/EIC for the 2012 tax year?

- 1 Yes
- 2 No
- 3 Don't know

**[SC]**

Q26. Which of the following describes how your 2012 federal taxes were **prepared**? By this, we mean filling out the forms and *NOT* the actual filing task.

- 1 By hand, using IRS tax forms
- 2 On a computer, using purchased tax software (for example, TurboTax or TaxAct)
- 3 Went to IRS.gov, found a Free File company and used their tax software (Traditional Free File)
- 4 Went to IRS.gov and used Free File Fillable Forms - filled in blank tax forms online without using tax software
- 5 Went to IRS.gov Espanol, found a Free File company and used their tax software in Spanish (Traditional Free File)
- 6 Both by hand and using purchased tax software (for example, TurboTax or TaxAct)
- 7 Other, specify
- 8 Don't know/
- 9 Accountant/tax preparer/someone else prepared my return

**[SC, IF S3 = 1]**

Q27. Did you have your *2011* federal tax return available to you when you prepared your 2012 return?

- 1 Yes
- 2 No
- 3 First time filer/Not applicable

**Tax Filing**

**[SC]**

Q33. Are you **aware** that you can file your federal tax return electronically?

- 1 Yes
- 2 No

**[SC, SKIP IF Q26=3]**

Q35. Are you **aware** that “Free File” options are available on irs.gov, where taxpayers are re-directed from IRS.gov to a third party’s website to prepare and file their federal return online. This service is offered at no cost to those who qualify.

- 1 Yes
- 2 No

**[SC, IF XSPANISH = 2 and Q35=yes][SKIP if Q26=5]**

Q35s1. Are you **aware** that IRS Free-File is also available in Spanish from the Espanol section of irs.gov.?

- 1 Yes
- 2 No

**[ SC]**

Q30a. How was your 2012 federal tax return filed in 2013? Was the return:

- 1 Sent by U.S. mail or commercial delivery service
- 2 Filed electronically (e-file) (including Free File)
- 3 Delivered in person
- 4 Don’t know

**[SC, IF Q30A NOT =4 OR MISSING]**

Q31a. Did you **INSERT RESPONSE FROM Q30A** in the *previous* year?

- 1 Yes
- 2 No

**[MC if ((Q35=YES OR Q35S1=YES (AWARE OF FREE FILE)) AND (Q26 NOT = 3, 4 or 5(DID NOT USE TRADITIONAL FREE FILE))]**

Q37. What were the reasons that you did *not* use “**Free File**” for your 2012 tax return?

- 1 Do not meet the income requirements/my income is too high
- 2 Do not understand what Free File is
- 3 Instructions too confusing on IRS website
- 4 Difficult to use once I am on 3<sup>rd</sup> party website
- 5 Do not have confidence in Free File/trust in Free File
- 6 Do not have confidence in security of sending my personal information over the Internet
- 7 Feel that refund anticipation loan provides faster refund
- 8 Option was not offered
- 9 Accountant, tax preparer or someone else decided how to file for me
- 10 Not interested/Preferred another method
- 11 Free File did not support the forms/schedules I file because my taxes are complicated
- 12 Other (specify)\_\_\_\_\_

**[SC, GRID – MAKE ALL COLUMNS SAME WIDTH]**

Q38. Here are some questions about **preparing** and **filing** your return. How satisfied were you with the following:

- 1 Very dissatisfied
- 2 Dissatisfied
- 3 Neither satisfied nor dissatisfied (neutral)
- 4 Satisfied
- 5 Very satisfied

**[IF S3 = 1 SHOW]**

- a. The time you spent completing your federal tax return
- b. The ease of understanding what materials and documents to include with your federal tax return
- c. The ease of understanding where to send your return
- d. **[IF Q26=2, 6]** The amount of money you spent to file your federal tax return electronically
- e. **[IF Q26=3,4,5]** Ease of using Free File through the IRS website

**[SC, IF S3 NE 1]**

Q39a1. Taking *all* factors into account, please rate your overall satisfaction with the **person** who completed your return.

- 1 Very dissatisfied
- 2 Dissatisfied
- 3 Neither satisfied nor dissatisfied (neutral)
- 4 Satisfied
- 5 Very satisfied

**[SC, IF S3 NE 1]**

Q39a2. Taking *all* factors into account, please rate your overall satisfaction with the **filing process** (the actual filing task) of your federal return.

- 1 Very dissatisfied
- 2 Dissatisfied
- 3 Neither satisfied nor dissatisfied (neutral)
- 4 Satisfied
- 5 Very satisfied
- 6 Not applicable/someone else filed my tax return

**[SC, IF S3 = 1]**

Q39b. Taking *all* factors into account, please rate your overall satisfaction with **preparing** and **filing** your federal return.

- 1 Very dissatisfied
- 2 Dissatisfied
- 3 Neither satisfied nor dissatisfied (neutral)
- 4 Satisfied
- 5 Very satisfied

**IV. GETTING YOUR REFUND FROM THE IRS**

**[IF Q3A NE 8 AND Q4A NE 9 AND Q5A NE 8 AND Q6A NE 9 AND Q8A NE3 AND Q16 NE 10 , SC]**

**[SC]**

Q42a In the *past 12 months*, did you contact the IRS about a refund from *any* tax year?

Yes **[GO TO Q42C]**

No **[GO TO Q43]**

-  
**IF Q3a=8 or Q4a=9 or Q5a=8 or Q6a=9 or Q8a=3 OR [Q16=10 and (Q18=6 or Q19=6)] (Refund Information), ASK Q42b]**

**[SC]**

42b You said earlier that you contacted the IRS about a refund by

**[IF Q3A = 8 INSERT ‘calling an IRS Toll-Free line’,  
[IF Q4A = 9 INSERT ‘visiting a local IRS office (Taxpayer Assistance Center, walk-in center),  
[IF Q5A = 8 INSERT ‘going to the IRS website’,  
[IF Q6A = 9 INSERT ‘using regular mail to contact the IRS’,  
[IF Q16=10 and (q18=6 or q19=6)] or [IF Q8a=3] ‘ IRS2Go App (for smartphone or tablet mobile device)’**

Did you also contact the IRS about a refund from any tax year in the *last 12 months* through

**[IF Q3A NE 8 INSERT ‘calling an IRS Toll-Free line’,  
[IF Q4A NE 9 INSERT ‘visiting a local IRS office (Taxpayer Assistance Center, walk-in center),  
[IF Q5A NE 8 INSERT ‘going to the IRS website’,  
[IF Q6A NE 9 INSERT ‘using regular mail to contact the IRS’,  
[IF Q16 NE 10 or (q18 NE 6 and q19 NE 6) and [Q8a NE 3]INSERT ‘using IRS2Go App (for smartphone or tablet mobile device)**

Yes **[ASK Q42c]**

No **[SKIP TO Q43]**

**[IF Q42B = 1, MC/NUM GRID, RANGE 0-99]**

Q42c. How did you contact the IRS about the refund and how many *times* did you contact the IRS about a refund in the *past 12 months* for each method?

Months	Method	CHECKBOX	Number of Times in Past 12
--------	--------	----------	----------------------------

1. **[IF Q3A = 8 DO NOT DISPLAY OPTION]**Call an IRS Toll-Free line
2. **[IF Q4A = 9 DO NOT DISPLAY OPTION]**Visit the local IRS office (Taxpayer Assistance Center, walk-in center)
3. **[IF Q5A = 8 DO NOT DISPLAY OPTION]**Visit the IRS website
4. **[IF Q6A = 9 DO NOT DISPLAY OPTION]**Send regular mail to the IRS
5. **[IF Q16=10 and (q18=6 or q19=6)] or [IF Q8a=3 DO NOY DISPLAY OPTION]** Use IRS2Go App (for smartphone or tablet mobile device)

Following are some questions about getting a refund from the IRS for your 2012 federal tax return.

[SC]

Q43a. When you prepared your 2012 federal tax return, did you think you would get a tax refund or that you owed taxes?

- 1 Thought I owed taxes
- 2 Expected a refund
- 3 Neither
- 4 Don't know

[SC]

Q43b. In the end, did you get a refund, owe money or neither?

- 1 Got refund
- 2 Owed money
- 3 Neither
- 4 Don't know

[SC, IF Q43B = 1]

Q46 Have you **received** your refund for your 2012 tax return yet? If you were expecting a refund, but it was withheld for any reason, please answer "No".

- 1 Yes
- 2 No
- 3 Applied to prior year balance/estimated tax

[SC, IF 46 = 1, 2]

Q48. [IF Q46 = 2, **SHOW** How did you request to receive your refund?  
[IF Q46 = 1, **SHOW** How did you receive your refund?

- 1 Direct deposit
- 2 Paper check
- 3 Refund Anticipation Loan (RAL). **This is a short-term loan secured and repaid by your tax refund**
- 4

[SC, IF Q48=3]

Q45b. If you knew the IRS could directly deposit your refund into your bank account in three days, would you still have taken the Refund Anticipation Loan (RAL)?

- 1 Yes
- 2 No

[SC/GRID, IF Q43B = 1 – MAKE ALL COLUMNS SAME WIDTH]

Q50. Please rate your satisfaction with the following aspects of getting your refund from the IRS. How satisfied were you with:

- 1 Very dissatisfied
- 2 Dissatisfied
- 3 Neither satisfied nor dissatisfied (neutral)
- 4 Satisfied
- 5 Very satisfied
- 6 Not applicable

- a The time it took to receive your refund from the IRS
- b The accuracy of your refund
- c The IRS's explanation of any adjustments to your refund

**[SC, IF Q43B = 1]**

Q51. Taking *all* factors into account, please rate your satisfaction with getting your refund from the IRS for the 2012 tax season?

- 1 Very dissatisfied
- 2 Dissatisfied
- 3 Neither satisfied nor dissatisfied (neutral)
- 4 Satisfied
- 5 Very satisfied



## V. RESOLVING ISSUES AFTER FILING: THOSE WHO RECEIVED NOTICE

The following questions are about **notices**. A notice is a letter sent in the mail from the IRS regarding an issue such as a balance due, an overpayment, or a request for information.

### Notice Receipt and Topic

[SC]

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

- 1 Yes
- 2 No

[IF Q52 = 2 AND Q3A NE 5 AND Q4A NE 5 AND Q6A NE 5, SKIP TO NEXT SECTION]

[DISPLAY IF Q3A = 5 OR Q4A = 5 OR Q6A = 5]

Next are some questions about contacting the IRS in the past 12 months about *any* notices you've received.

[DISPLAY IF Q3A = 5 OR Q4A = 5 OR Q6A = 5]

[REMOVE YES/NO ANSWER CHOICES]

You mentioned that you have contacted the IRS about a notice by [Insert "Calling an IRS Toll-Free line" if Q3a=5], [Insert "Visiting a local IRS office" if Q4a=5], [Insert "Sending regular mail to the IRS" if Q6a=5].

[MC/NUM GRID, RANGE 0-99][ADD A COLUMN FOR CHECKBOX]

[show Q56a/56b if Q3a ne 5 or Q4a ne 5 or Q6a ne 5]

Q56a/56b. Did you contact the IRS about the notice by the following methods? If so, how many *times* did you contact the IRS about a notice in the *past 12 months* for each method?

Method	CHECKBOX	Number of Times in Past 12 Months
1. [IF Q3A = 5 DO NOT DISPLAY OPTION]Call an IRS Toll-Free line	_____	_____
2. [IF Q4A = 5 DO NOT DISPLAY OPTION]Visit a local IRS office (Taxpayer Assistance Center, walk-in center)	_____	_____
3. [IF Q6A = 5 DO NOT DISPLAY OPTION]Send regular mail to the IRS	_____	_____

The following questions are about your *most recent* notice from the IRS:

[SC]

Q57. What was your *most recent* notice about?

- 1 Filing issue [IF Yes go to Q57A]
- 2 Error on return [IF Yes go to Q57B]
- 3 Payment [IF Yes go to Q57C]
- 4 Refund issue [IF Yes go to Q57C]
- 5 Request for information/proof for items on my tax return (correspondence exam)
- 6 Credits you might be eligible for but did not claim
- 7 Other (specify)
- 8 The purpose of the notice was not clear
- 9 Do not recall

**[SC, IF Q57=1]**

Q57a. Which of the following best describes the filing issue regarding your most recent notice?

- 1 Didn't file a return
- 2 Didn't sign return or form
- 3 Resubmitting/missing forms
- 4 Penalty for late filing
- 5 Other (specify)

**[SC, IF Q57=2]**

Q57b. Which of the following best describes the error on return regarding your most recent notice?

- 1 Under-reported income
- 2 Incorrect amount of withholding
- 3 Incorrect filing status
- 4 Incorrect Social Security Number
- 5 Claimed a credit for which I didn't qualify
- 6 Other (specify)

**[SC, IF Q57=2]**

Q57b.1 Did this result in a refund or you owing money to the IRS?

- 1 Owed money to IRS
- 2 Refund
- 3 No change

**[SC, IF Q57=3]**

Q57c. Which of the following best describes the payment / refund issue regarding your most recent notice?

- 1 Didn't make a payment with return
- 2 Didn't pay the full amount due with return
- 3 Didn't make an Installment Agreement payment
- 4 Received additional / larger refund
- 5 Other (specify)

**Notice Inserts**

**[SC, IF Q52=1]**

58. Were additional paper inserts included with this most recent notice?

- 1 Yes
- 2 No
- 3 Don't remember

**[SC, IF Q58=1]**

Q59. Did you find the insert(s) included with the notice useful?

- 1 Yes
- 2 No
- 3 Some were useful, others were not

**[SC]**

Q60. If you are to receive communications from IRS in the future about your tax account, would you prefer to receive such communications through secure email or through the postal mail service?

- 1 Secure email for which you would register
- 2 Postal mail service
- 3 Neither email nor postal mail service (Specify)

[SC]

**Notice Resolution**

[SC]

Q61. How did you *first* choose to respond to the *most recent* notice?

- 1 Called an IRS Toll-Free line
- 2 Visited a local IRS office (Taxpayer Assistance Center, walk-in center)
- 3 Sent regular mail to the IRS
  
- 4 Had someone else respond: tax preparer, accountant, attorney
- 5 Had someone else respond: spouse, friend
- 6 [Show IF Q57b=1] Made a payment to the IRS immediately
- 7 Did nothing
- 8 Other \_\_\_\_\_
- 9 Don't remember
- 10 Not applicable

[SC, IF Q57b.1=1]

Q57b.2 You indicated earlier that your most recent notice said that you owed money to the IRS. Which of the following actions did you take to resolve your balance due notice? (Select one)

- 1 Made a payment in full to the IRS
- 2 Arranged for installment agreement with the IRS
- 3 Arranged for Offer In Compromise
- 4 None of the above

[SC, GRID]

Q57b.3 How much time did you spent on each of the following categories to resolve your most recent notice?

- |   |            |            |
|---|------------|------------|
| a. Reading the notice   | _____ hour | ___ minute |
| b. Organizing documentation   | _____ hour | ___ minute |
| c. Interacting with the IRS (including time spent on phone, IRS.gov, sending a letter)      | _____ hour | ___ minute |
| d. Contacting someone other than IRS (e.g. tax professional, etc.)                          | _____ hour | ___ minute |
| e. Arranging follow-up action (arranging for installment agreement/<br>offer in compromise) | _____ hour | ___ minute |
| f. Other  | _____ hour | ___ minute |

[SC, IF Q57=2]

Q57b.4 Do you feel the IRS accurately determined the error that caused the notice?

- 1 Yes
- 2 No

[SC, IF Q61=1]

[SC, IF 61 = 6]

Q63. What was the *primary* reason that you did *nothing* about the notice?

- 1 It wasn't clear what I was supposed to do
- 2 The notice said no action was needed
- 3 The issue was already resolved
- 4 Other (specify) \_\_\_\_\_

### Interim Letter Questions

[SC, IF Q61=1-5, 7]

Q66. *After* your initial response to the notice, did you receive correspondence from the IRS indicating your "case" was under review and that the IRS would be **getting back to you** (i.e., an "interim" letter regarding the status of your correspondence)?

- 1 Yes
- 2 No
- 3 Do not remember
- 4 Do not know

[SC, IF Q66 = 1]

Q67. Was the "interim" letter useful in providing an adequate update on the status of your *most recent* notice?

- 1 Yes
- 2 No

[SC, IF Q66 = 1]

Q68. Was it clear that this "interim" letter required **no action** from you until the IRS contacted you again (except to continue making payments that are due)?

- 1 Yes
- 2 No

[SC, IF Q66 = 1]

Q69. About how many months went by *between* the time you responded to the initial notice and the time you received the "interim" letter?

- 1 Less than 1 month
- 2 Between 1 to 3 months
- 3 Between 3 and 6 months
- 4 More than 6 months
- 5 Don't remember/don't know

[SC, IF NEW Q66 = 1]

Q70a. Please rate your satisfaction with the timeliness of receiving this "interim" letter.

- 1 Very dissatisfied
- 2 Dissatisfied
- 3 Neither satisfied nor dissatisfied (neutral)
- 4 Satisfied
- 5 Very satisfied

[SC, IF 61 = 1-5, 7]

Q64. From the time you received your *most recent* notice, about how long did it take to resolve the issue?

- 1 Less than 1 day
- 2 1 day or longer, but less than 1 week
- 3 Between 1 and 2 weeks
- 4 More than 2 weeks, but less than 1 month
- 5 Between 1 and 3 months
- 6 Between 3 and 6 months
- 7 More than 6 months
- 8 Notice issue still unresolved
- 9 Don't remember/don't know

**[GRID, IF Q61=1-5, 7, DO NOT SPLIT INTO TWO GROUPS]**

Q65. Recalling your experience with the notice, please indicate the level to which you **agree** or **disagree** with the following statements:

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

- a. The language was easy to understand
- b. The layout was easy to follow
- d. The notice contained too much information
- e. The notice contained the information I needed
- f. The notice was clear on how to use IRS services to resolve the issue
- g. The contact information was easy to locate

**[SC]**

Q70b. Thinking about *all* aspects of your experience with your *most recent* IRS notice, please rate your satisfaction with the overall notice process.

- 1 Very dissatisfied
- 2 Dissatisfied
- 3 Neither satisfied nor dissatisfied (neutral)
- 4 Satisfied
- 5 Very satisfied

## VI. OVERALL SATISFACTION: ALL RESPONDENTS

### Overall Satisfaction

**[PROMPT, SC, IF XSPANISH = 2]**

Q71a. Please rate your *overall* satisfaction with the Spanish-language assistance you received from the IRS for your 2012 federal taxes.

- 1 Very dissatisfied
- 2 Dissatisfied
- 3 Neither satisfied nor dissatisfied (neutral)
- 4 Satisfied
- 5 Very Satisfied

**[PROMPT, SC]**

Q71b. Considering *all* factors concerning your 2012 federal tax return (including getting information, preparation and filing, and refund or notice issues), please rate your *overall* satisfaction with the **entire 2012 tax filing process**.

- 1 Very dissatisfied
- 2 Dissatisfied
- 3 Neither satisfied nor dissatisfied (neutral)
- 4 Satisfied
- 5 Very Satisfied

**[TXT]**

Q72. What could the IRS have done to improve your experience with your 2012 taxes? Please comment on the IRS service or products rather than tax laws or codes. If you have no suggestions, please enter "None."

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## VII. PSYCHOGRAPHIC QUESTIONS

### [SC, GRID]

Q73. The next set of questions are opinion questions that give us an indication of taxpayer views on finance and Internet-related issues. Please indicate the extent to which you **agree** or **disagree** with each of the following statements. **[Rotate list of items]**

- 1 Strongly disagree
  - 2 Disagree
  - 3 Neither agree nor disagree
  - 4 Agree
  - 5 Strongly agree
- 
- a. I enjoy doing research on the Internet
  - b. Technology is important to me
  - c. I perform financial activities (i.e., pay bills, credit cards, insurance, mortgages, etc) on the Internet
  - d. I make purchases on the Internet
  - e. I feel secure sharing personal financial information over the Internet
  - f. I think preparing tax returns should be made easier
  - g. I am knowledgeable about U.S. Tax Code
  - h. I pay attention to changes proposed or made to U.S. Tax Code which may or may not impact my personal tax situation
  - i. I proactively plan for and minimize my tax burden throughout the year by tracking deductible expenses, making purchases to qualify for tax credits, selling investments to offset capital gains, making charitable donations, etc.
  - j. I think electronic filing should be free to everyone
  - k. I think there should be an alternative tax system to replace the income tax system
  - l. I regularly save money
  - m. I have an emergency fund/financial safety net
  - n. I'm confident in my ability to solve financial problems that come up in my everyday life

## **VIII. DEMOGRAPHICS: ALL RESPONDENTS**

Here are a few questions for classification purposes only.

**[SC]**

D1. Do you have a computer at home?

- 1 Yes
- 2 No

**[SC]**

D1.1 Do you own and use a mobile phone?

- 1 Yes, regular mobile phone
- 2 Yes, Smartphone (mobile phone with applications and internet access )
- 3 No

**[MC]**

D1.2 Which of the following social media sources do you use? (*Check all that apply*)

- 1 Facebook
- 2 Twitter
- 3 YouTube
- 4 LinkedIn
- 5 Other (specify) \_\_\_\_\_
- 6 None

**[SC]**

D2.1. Do you access the Internet apart from taking surveys via Research Now?

- 1 Yes
- 2 No

**[SC]**

D5. What is the *highest* level of education you have completed?

- 1 Less than 9<sup>th</sup> grade
- 2 9<sup>th</sup> grade to 12<sup>th</sup> grade, no diploma
- 3 High school graduate/GED
- 4 Some technical/vocational school
- 5 Technical or vocational school graduate
- 6 Some college, no degree
- 7 Associate Degree
- 8 Bachelor's Degree
- 9 Master's Degree
- 10 Post-Master's Degree



**[MC]**

D6. Do you have *any* of the following long-term conditions (lasting 6 months or more)? Please select all that apply.

- 1 Deafness
- 2 Severe Vision Impairment
- 3 Severe Hearing Impairment
- 4 Severe Speech Impairment
- 5 A condition that substantially limits your physical abilities (such as standing or walking)
- 6 A condition that limits learning or remembering
- 7 Some other condition
- 8 Do not have a long-term condition **[SC]**

**[SC, IF D6 = 1-7]**

D6a. Does your disability prevent you from going outside of your home?

- 1 Yes
- 2 No

**[SC]**

D7. What is your employment status?

- 1 Work full-time
- 2 Work part-time
- 3 Retired
- 4 Full-time student
- 5 Unemployed, looking for work
- 6 Employed in the home/homemaker (for example, a stay at home parent)
- 7 Other

**[NUM ENTER DIGITS 0-99, IF D7 = 5]**

D7.1 For how many *months* have you been unemployed and looking for work?

\_\_\_\_\_ months

**[SC]**

D8. Did you report having *any* dependents on your 2012 tax return?

- 1 Yes
- 2 No

**[SC]**

D9. Which of the following categories best describes your household income *before* taxes for 2012?

- 1 Less than \$10,000
- 2 \$10,000 to less than \$15,000
- 3 \$15,000 to less than \$20,000
- 4 \$20,000 to less than \$25,000
- 5 \$25,000 to less than \$35,000
- 6 \$35,000 to less than \$50,000
- 7 \$50,000 to less than \$75,000
- 8 \$75,000 to less than \$100,000
- 9 \$100,000 to less than \$150,000

- 10 \$150,000 to less than \$200,000
- 11 \$200,000 to less than \$1 million
- 12 \$1 million or more

**[SC]**

D10. Do you speak a language *other* than **English** at home?

- 1 Yes
- 2 No

**[SC, IF XSPANISH = 2]**

D11A. Are you of Hispanic or Latino origin (ethnicity)?

- 1 Yes
- 2 No

D11B. What is your race? Please select one or more. Are you...

- White
- Black or African American
- Asian
- Native Hawaiian or other Pacific Islander
- American Indian or Alaskan Native

**[SC, IF XSPANISH = 2]**

D12. What is your country of origin?

- 1 Argentina
- 2 Colombia
- 3 Cuba
- 4 Dominican Republic
- 5 Ecuador
- 6 El Salvador
- 7 Guatemala
- 8 Honduras
- 9 Mexico
- 10 Nicaragua
- 11 Peru
- 12 Puerto Rico
- 13 Spain
- 14 United States
- 15 Venezuela
- 16 Other (Please specify)