

## FIRST INVITATION LETTER

You are receiving this email because the IRS asked IPSOS, an independent research company, to find out what you think about their products and services. [Click here](#) and enter "unsubscribe IRS" if you would no longer like to receive invitations from them.

Dear [NAME],

Please complete the following survey so that your feedback can help the IRS improve its service to taxpayers. It will take about 30 minutes to finish. Because this study is time sensitive, we ask that you complete it as soon as possible.

[Click here to get started](#)

Your participation in this survey is voluntary, and there are no penalties if you choose not to participate. However, your responses are very important to the accuracy and usefulness of the results.

Your information will be kept private to the extent allowed by law, and may not be disclosed except as provided by law. IPSOS is conducting this survey for the IRS. IPSOS will provide survey responses to the IRS without any identifying information and will keep your identity private to the extent allowed by law.

Our authority to request survey information is 26 USC 7801, which provides the Treasury authority for general administration of the Federal tax law.

If you have any questions, please contact the Help Line toll-free at 1-800-XXX-XXXX.

If you wish to verify the IRS's sponsorship of the survey, please visit **[www.irs.gov/uac/Customer-Satisfaction-Surveys](http://www.irs.gov/uac/Customer-Satisfaction-Surveys)**.

Thank you for your participation.

Best Regards,  
Ipsos Interactive Services

We are a member of the Council of American Survey Research Organizations (CASRO).

If you do not wish to receive any contact from Ipsos, [click here](#).

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This email was sent to: [EMAIL]

If you require any help with this survey, please quote survey number: [PID]

## REMINDER 1 LETTER

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Dear [NAME]

Recently, we sent you a survey related to your preference for IRS services . The survey may be completed online at [WEBLINK](#). If you already have completed and submitted the survey, please accept our sincere thanks. If not, please take a few minutes to complete it today. Your input is important and we want to be sure we include your feedback.

IPSOS is conducting this survey for the IRS. Your information will be kept private to the extent allowed by law, and may not be disclosed except as provided by law.

If you are having difficulty completing the survey, please call us at 1-800-XXX-XXXX.

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## REMINDER 2 LETTER

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Dear [NAME]

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[Click here to get started](#)

The purpose for requesting this information is to help the IRS improve its service to taxpayers. Our authority to request survey information is 26 USC 7801, which provides the Treasury authority for general administration of the Federal tax law.

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Thank you in advance for your participation.

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This email was sent to: [EMAIL]

If you require any help with this survey, please quote survey number: [PID]

### **REMINDER 3 LETTER**

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Recently, we sent you a survey related to your preferences for IRS services. The survey may be completed online at WEBLINK. If you already have completed and submitted the survey, please accept our sincere thanks. If not, please take a few minutes to complete it today. Your input is important and we want to be sure we include your feedback. The deadline for completing the survey is DATE.

IPSOS is conducting this survey for the IRS. Your information will be kept private to the extent allowed by law, and may not be disclosed except as provided by law.

If you are having difficulty completing the survey, please call us at 1-800-XXX-XXXX.

We are a member of the Council of American Survey Research Organizations (CASRO).

If you do not wish to receive any contact from Ipsos, [click here](#).

Ipsos. All Rights Reserved.

This email was sent to: [EMAIL]

If you require any help with this survey, please quote survey number: [PID]

IRS Taxpayer Service Survey  
December 2013  
- Study Details -

**[DISPLAY]**

Welcome to the IRS Taxpayer Service Survey. The IRS would like to learn more about your experiences and preferences with IRS services. This survey is voluntary and your responses will be kept anonymous.

For most of the questions in this survey, there are no right or wrong answers. We are simply interested in your opinions.

If you have questions about this survey, you may call the Survey Helpline at 1-800-###-####.

**[RADIO]**

**[PROMPT IF SKIP]**

**1.** Who is the adult, aged 18 or older, in the household who is the most familiar with filing last year's federal income tax returns for your household?

- Myself (Continue)
- Myself and another adult equally (Continue)
- Someone else in household (Terminate)
- Didn't file taxes last year (Terminate)

[RADIO]

[PROMPT IF SKIP]

2. Are you currently employed by the IRS?

Yes – (Terminate)

No – (Continue)

*(If “Terminate” say) Thank you for your time. Unfortunately, you are not eligible for this survey.*

*(If “Continue” go to Q3)*

[RADIO]

[PROMPT IF SKIP]

3. The IRS sometimes asks taxpayers to provide them with documentation that was missing on their tax return. Have you ever received a letter from the IRS asking you to provide additional information, receipts, or documentation?

Yes – (Continue – count towards subsample requirement)

No – (Continue)

[RADIO]

[PROMPT IF SKIP]

4. People need help with many issues related to taxes. For each of the issues listed, indicate if you have ever needed to complete the task.

- Submit documentation to the IRS to verify items listed on your tax return. For example, document the itemized deductions you listed on your Schedule A, provide receipts for your medical expenses, or provide receipts for charitable donations.

Yes No

- Check the status of your compliance case. For example, find out whether a payment was received or documentation was received by the IRS.  
Yes No
- Sign a document. For example, sign a document to show you agree with the proposed changes to your tax return.  
Yes No
- Get more information about a notice you received from the IRS. For example, get more information about what documents the IRS needs you to send or why the documents are needed  
Yes No
- Get a copy of your previous year return.  
Yes No
- Make a payment or set up a payment plan.  
Yes No

(Continue – count any person who answered “Yes” to at least one of the first four tasks towards subsample requirement)

**CREATE DATA ONLY VARIABLES:**

**SERVICE1=1-6: RANDOMLY SELECT FROM ITEMS MARKED “YES” ABOVE.**

**SERVICE2=1-6: RANDOMLY SELECT FROM ITEMS MARKED “NO” OR “SKIP” ABOVE.**

**IF NO ITEM IS SELECTED “YES”, THEN RANDOMLY SELECT TWO AND ASSIGN THEM TO BE “SERVICE1” AND “SERVICE2”.**

**IF NO ITEM IS SELECTED “NO”, THEN RANDOMLY SELECT TWO AND ASSIGN THEM TO BE “SERVICE1” AND “SERVICE2”.**

## **DEMOGRAPHIC QUESTIONS**

4. Who was the main person who prepared your most recent tax return? Was it: *[Select only one] (Must select one)*

- You (yourself) (go to Q3a)
- A paid preparer (such as H&R Block, Jackson Hewitt, accountant or CPA) (go to Q3b)
- An unpaid preparer (friend, relative, colleague, or a volunteer preparer from a community organization) (go to Q3c)

**[RADIO]**

**[IF YOU/YOURSELF IN Q3]  
[PROMPT IF SKIP]**

**3a.** For this most recent tax return, did you mainly use computer software to prepare your taxes, or did you prepare them by hand?

- Used software (such as TurboTax )
- Used the IRS Free File program on irs.gov
- Prepared by hand

**[RADIO]  
[IF YES TO PAID PREPARER IN Q3]  
[PROMPT IF SKIP]**

**3b.** For this most recent tax return, did you use a tax preparation firm like H&R Block or Jackson Hewitt, or did you use an independent practitioner like an accountant or CPA?

- Tax preparation firm (such as H&R Block or Jackson Hewitt)
- Independent preparer (accountant or CPA)

**[RADIO]  
[IF YES TO UNPAID PREPARER IN Q3]  
[PROMPT IF SKIP]**

**3c.** For this most recent tax return, who prepared your taxes free of charge?

- A volunteer preparer from a community organization or Tax Counseling for the Elderly site
- Local IRS office
- Friend or relative

**[RADIO]  
[PROMPT IF SKIP][DO NOT SHOW IF Q3A=2]**

**3d.** For this most recent tax return, was your return sent to the IRS by paper via regular mail or electronically?

- Regular mail
- Electronically
- Other method (e.g. dropped off in person, etc.)

**CREATE DATA ONLY VARIABLE BASED ON Q3 AND Q4:**

**CURRENT:**

1=myself using software and was mailed by regular mail  
2=myself using software and was e-filed



- 3=myself using software and other method
- 4=myself by hand and was mailed by regular mail
- 5=myself by hand and other method
- 6=myself using Free File and was e-filed
- 7=a tax preparation firm and was mailed by regular mail
- 8=a tax preparation firm and was e-filed
- 9=a tax preparation firm and other method
- 10=an independent preparer and was mailed by regular mail
- 11= an independent preparer and was e-filed
- 12=an independent preparer and other method
- 13=a community organization/free site and was mailed by regular mail
- 14= a community organization/free site and was e-filed
- 15=a community organization/free site and other method
- 16=a local IRS Office and was mailed by regular mail
- 17= a local IRS Office and was e-filed
- 18= a local IRS Office and other method
- 19=a friend or relative and was mailed by regular mail
- 20=a friend or relative and was e-filed
- 21=a friend or relative and other method

**[RADIO]**

7. Which category best describes your total household income for the past 12 months? Please include your income **plus** the income of all members living in your household (including cohabiting partners and armed forces members living at home). Please count income **before taxes**, including income from all sources (such as wages, salaries, tips, net income from a business, dividends, child support, alimony, and Social Security, pensions, or retirement benefits).

- Less than \$30,000
- \$30,000 to \$35,999
- \$36,000 to \$49,999
- \$50,000 to \$61,999
- \$62,000 to \$99,999
- \$100,000 or more

8. Which category best describes your current age?

- 18-24
- 25-35
- 36-45

- 46-55
- 56-65
- 66-75
- 76 or older

**9a.** How well would you say you can carry on a **conversation** in English?

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

**9b.** How well would you say you can **read** a newspaper or book in English?

- 1 Very well
- 2 Well
- 3 Not well [Terminate]
- 4 Not at all [Terminate]

[RADIO]

[PROMPT IF SKIP]

## Most Recent Federal Tax Filing Situation

**10.** Which of the following forms were used to file your 2012 tax return (tax return filed in 2013 for income earned in year 2012)?

If you are unsure which form you used, you may click on the names below to see an image of the forms. If you do not recall and have the form available, you may choose to pause the survey and verify the form you used to file your most recent tax return. [Select only one]

- 1 Short form 1040EZ - did not itemize deductions [**skip to Q11**]

- 2 Short form 1040A - did not itemize deductions [**skip to Q11**]
- 3 Form 1040A WITH other forms or schedules
- 3 Long form 1040 WITHOUT other forms or schedules - did not itemize deductions [**skip to Q11**]
- 4 Long form 1040 WITH other forms or schedules
- 5 Long form - don't remember if had other forms/schedules
- 6 Short form - don't remember which one [**skip to Q11**]
- 7 Don't know [**skip to Q11**]

**[IF Q10 IS 3, 4 OR 5]**

**10a.** 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

- 1 Schedule A for itemized deductions including home mortgage deductions, charitable contributions, and other types of deductions
- 2 Schedule B for interest and dividend income
- 3 Schedule C for small business income
- 4 Schedule D for capital gains or losses
- 5 Schedule E for supplemental income, such as rental income, royalties, and trusts
- 6 Schedule F for farm income
- 7 Form 2106 employee business expenses
- 8 Schedule EIC for earned income credit
- 9 Forms related to partnerships or S Corp [TERMINATE IF SELECTED]

## **DESCRIPTION OF TAX ASSISTANCE METHODS**

We are going to ask you to think about when you might get information or help from the IRS and how the IRS offers to help taxpayers. The main methods are: calling the IRS Toll Free line, visiting the [www.irs.gov](http://www.irs.gov) website, sending a letter in the mail, sending a message through a secure portal, faxing documents, visiting a walk-in office, and using smartphone applications. We are going to describe each of these to you and later we will ask you to tell us when you might use them. Please note that these methods are either currently available or may be available to you in the future.

[RADIO]

## IRS TOLL-FREE PHONE LINE

One method of help is the IRS Toll-Free assistance line, which offers an automated self-help menu and access to live phone assistor.

11. Have you tried calling the IRS Toll-Free line in the last two years?

- Yes
- No

[RADIO]

[IF Q11=YES]

11a For the most recent interaction, did you.....?

- Talk to a live phone assistor
- Use the automated menu responses with no live assistor

[RADIO]

## IRS WEBSITE

Next, let's talk about the IRS website that can be reached at [www.irs.gov](http://www.irs.gov). You must have Internet access to use the IRS website. Once at the website, you can browse through different pages to find information about filing taxes or use interactive tools. Interactive tools are electronic tools that help you perform tasks on [irs.gov](http://irs.gov), such as calculating withholding amounts, determining your filing status, or finding out the status of your refund.

12. Have you visited the IRS website in the last two years?

- Yes
- No

**[RADIO]**

**[IF Q12=YES]**

12a For the most recent visit, did you.....?

- Browse through different pages to find and read information
- Use an interactive tool to get the answer to a tax law question or complete a task

**[RADIO]**

**SMARTPHONE**

The IRS has begun offering applications for smartphones. A smartphone is a device that a person can use to make telephone calls, but also adds in features that you might find on a personal digital assistant or a computer. Examples of smartphones include the iPhone and Android smartphones (i.e. HTC Evo, Motorola Droid X, Samsung Galaxy, etc.).

Individuals can download applications for smartphones that allow them to complete tasks or get information. An example of a current smartphone application offered by the IRS is IRS2go. IRS2go lets taxpayers check on the status of their tax refund and obtain helpful tax information.

**13. Do you currently own a smartphone?**

- Yes
- No, but I am considering buying one
- No, and I am not considering buying one

**[RADIO]**

**[IF Q13=YES]**

13a. Have you used the IRS smartphone application named IRS2go?

- Yes
- No

**[RADIO]**

**REGULAR MAIL**

The IRS also provides service through regular mail. Taxpayers can use the regular mail to ask tax questions and send payments.

**14a.** Have you sent a letter to the IRS using regular mail in the last two years?

- Yes
- No

**14b.** Have you sent a payment to the IRS using regular mail in the last two years?

- Yes
- No

## **FAX**

Taxpayers can transfer documents to the IRS via fax. For example, taxpayers can fax receipts or signed documents to the IRS.

**15.** Have you contacted the IRS via fax within the last two years?

- Yes
- No

[GRID]  
[SHOW HEADER AT TOP MIDDLE AND BOTTOM OF SCREEN]  
[PROMPT IF SKIP]

[RADIO]  
SECURE MESSAGE

The IRS may offer e-mail communication to taxpayers through a secure portal similar to secure message systems used by some health insurance companies, credit card companies, banks, and loan institutions. In this type of communication, people can log onto the company's website and send a message to the company, such as a question about a health insurance claim or account discrepancy.

16a. Have you used a secure message system through an online website within the last two years?

- Yes
- No

The IRS may offer automatic e-mail notifications for account status updates similar to account notifications provided by some banks and credit card companies to inform customers of low balances or payments processed. For the automatic e-mail notifications, taxpayers would sign up for the service and then get emails whenever a change to their account occurs, such as a payment posting to their account.

16b. Have you signed up for account alerts with a private company within the last two years?

- Yes
- No

#### **LOCAL IRS OFFICE**

The IRS runs local IRS offices in many cities throughout the country. At these offices, you can walk in and get a number of services related to paying your taxes. You can get forms, get questions answered, and get help with your tax return. IRS service representatives are available to help you in person, if necessary.

17a. Have you visited a local IRS office for any reason in the last two years (24 months)?

- Yes
- No

**[RADIO]**

**[IF Q17A=YES]**

Q17b For the most recent interaction, did you....?

- Need face-to-face assistance with a representative (1)
- Serve yourself with no live assistance needed (2)

## SECURE ONLINE CHAT

The IRS may offer secure online chat through the irs.gov website where taxpayers can communicate with a live assistor through the internet by typing messages to one another in real time. Some insurance companies, banks, and other companies have this feature on their webpage for individuals who cannot find answers to their questions through browsing the web.

18a. Have you used online chat through a company's website within the last two years?

- Yes
- No

[DISPLAY]

## TAX ASSISTANCE ATTRIBUTE DESCRIPTIONS

Now we want to explain a few terms that will be used for the rest of this survey. Some of these will have different meanings depending on whether the help comes from the IRS Toll-Free line, the IRS Website, smartphone applications, local IRS office, or regular mail.

**19. <in yellow>Time required </in yellow>** means the time it takes to get a question answered or service completed, including any time you wait to receive service.

Time required does not include the time it takes to find the Toll-Free line phone number, IRS mailing address, the irs.gov website, or social media websites. For smartphone applications, it does not include the time it takes to find, purchase, and download the application.

[DISPLAY]



**20. <in yellow>Authentication </in yellow>** means what the taxpayer must do in order to verify their identity at the beginning of the service. For example, a taxpayer may have to provide their Social Security Number or answer questions about their credit history.

Authentication requirement(s) vary. The options for authentication requirement(s) are:

- 1 – Taxpayer must accurately answer 3 questions to verify their identity
- 2 – Taxpayer must accurately answer 5 questions to verify their identity
- 3 – Taxpayer must accurately answer 7 questions to verify their identity

[DISPLAY]

**21. <in yellow>Confirmation of receipt</in yellow>** means whether the taxpayer receives a follow-up email communication from the IRS confirming that their communication, document, or payment was received. This email would include a date range or time frame for when the taxpayer should expect to see an adjustment to their account from the interaction.

Confirmation of receipt only applies to the following methods of help: secure email, online tools, smartphone application, and secure online chat.

[DISPLAY]

**22. <in yellow>Information Required</in yellow>** means information about yourself that you must provide to receive service. Examples include your Social Security Number, name, address, or bank account information.

[GRID]

[SHOW HEADER AT TOP MIDDLE AND BOTTOM OF SCREEN]

[PROMPT IF SKIP]

## PRACTICE QUESTION

Please answer the following practice question to make sure we are explaining the task clearly.

[Select SERVICE1 VARIABLE CREATED IN Q4]

23. Now I'd like to you to assume your problem is "SERVICE1"

Assume that you have enough time before taxes are due so that you can use any of the help methods to try to resolve your issue. We are going to ask you some questions to find out which help method you would choose.

Imagine that you need to phone the Toll-Free line and talk with a live assistor. In one instance, the time required to get a question answered or service completed, including any time you wait to receive service is 10 minutes. In another instance, time required would take you 60 minutes to have your question answered. Please look at the two options and select the one that you prefer based only on the information provided about each option.

|   |   |
|---|---|
| IRS Toll-Free<br>Line, Live<br>Customer Rep | IRS Toll-Free<br>Line, Live<br>Customer Rep |
| Time Required<br><br>60 minutes             | Time Required<br><br>10 minutes             |
| *   | *   |

[IF Q23=1]

23b. You chose the IRS Toll-free line that will take longer to get your question answered by a representative. Are you sure that you want to pick the Toll-Free option that has a longer service time?  
Select one answer only

- Yes, I'm sure that I want to phone an IRS Toll-free number that has a longer service time.

- No, I'm not sure. Ask the service time question again.

**[IF Q23B=2]**

**23c.** Now I'd like to you to assume your problem is: [**SERVICE1**].

Assume that you have enough time before taxes are due so that you can use any of the help methods. We are going to ask you some questions to find out which help method you would choose.

Imagine that you need to phone the Toll-Free line and talk with a live Customer Service Representative. In one instance, the time required to get a question answered or service completed, including any time you wait to receive service is 10 minutes. In another instance, time required would take you 60 minutes to have your question answered. Please look at the two options and select the one that you prefer based only on the information provided about each option.

| IRS Toll-Free Line, Live Customer Rep | IRS Toll-Free Line, Live Customer Rep |
|---------------------------------------|---------------------------------------|
| Time Required<br>60 minutes           | Time Required<br>10 minutes           |
| *                                     | *                                     |

### **TAX ASSISTANCE CHOICE TASK FOR <SERVICE1>**

**24a.** Now we'd like you to imagine that you are faced with this problem: <in yellow> [Service1] </in yellow> and would like to contact the IRS to resolve the issue.

Please select whether you'd use any of the following ways of getting assistance from the IRS, choosing always, sometimes, rarely, or never for each row. Please note that these methods are either currently available or may be available to you in the future. [Choose one response per row]

Always Sometimes

Rarely

Never

- Calling the Toll-Free line and talking with a live Customer Service Representative [Service1=Submit Receipt; Status of Case/Transaction; Sign a Document; Discuss Case Details; Get a Transcript; Ask Question]
- Calling the Toll-Free line and only using the automated voice menu responses [Service1=Status of Case/Transaction]
- Using an interactive tool on the IRS [www.irs.gov](http://www.irs.gov) website [Service1=Submit Receipt; Status of Case/Transaction; Sign a Document; Get a Transcript]
- Sending a letter to the IRS via regular mail [Service1=Submit a Receipt; Sign a Document]
- Using a smartphone application [Service1=Submit Receipt; Status of Case/Transaction; Sign a Document]
- Emailing the IRS through a secure messaging center [Service1=Submit Receipt; Status of Case/Transaction; Ask Question]
- Fax [Service1=Submit Receipt; Sign a Document]
- Sign up for automatic email notifications [Service1=Status of Case/Transaction]
- Go to a local IRS office [Service1=Status of Case/Transaction]
- Secure online chat [Service1=Submit Receipt; Status of Case/Transaction; Sign a Document; Ask Question]

**[SHOW IF MORE THAN 4 ITEMS WERE SELECTED IN ALWAYS, SOMETIMES, RARE IN Q24A]**

**24b1.** Of the following, which way are you MOST likely to use to get assistance from IRS to resolve this tax related problem: <in yellow> [service1] </in yellow>?.

**24b2.** Of the following, which way are you MOST likely to use to get assistance from IRS?

[show items not selected in Q24b1]

**24b3.** Of the following, which way are you MOST likely to use to get assistance from IRS?

[show items not selected in Q24b2]

**24b4.** Of the following, which way are you MOST likely to use to get assistance from IRS?

[SHOW ITEMS NOT SELECTED IN Q24B3]

CREATE DATA ONLY VARIABLE:

METHODA1  
METHODA2  
METHODA3  
METHODA4

IF Q24b1-4 Not shown:

- 1) if one item selected on Q24a, then METHODA1-4=one item
- 2) if two items selected on Q24a, then randomly assign the two items (twice each item) to METHODA1-4.
- 3) if three items selected on Q24a, then one of the items be repeated twice. Randomly assign the four items to METHODA1-4
- 4) if four items selected on Q24a, then randomly assign the four items to METHODA1-4
- 5) If no item selected on Q24a, then randomly select four methods, PROVIDED the method is available for the chosen [Service1]

IF Q24b1-4 shown:

- 1) If Q24b1-4 not skipped, randomly assign answers from Q24b1-4 to METHODA1-4
- 2) If Q24b4 skipped, randomly assign answers from Q24b1-3 and one from the unselected remaining item from Q24b3 to METHODA1-4
- 3) If Q24b3 skipped, randomly assign answers from Q24b1-2 and two from the unselected remaining items from Q24b2 to METHODA1-4
- 4) If Q24b2 skipped, randomly assign answer from Q24b1 and three from the unselected remaining items from Q24b1 to METHODA1-4
- 5) If Q24b1 skipped, randomly assign four items from Q24b1 to METHODA1-4

25-34. Please assume that your problem is: **<in yellow> [service 1] </in yellow>**.

You need to contact the IRS to resolve this issue. Each of the next ten screens will show you four ways to resolve it, one in each column. Each of the four ways on each screen will have different characteristics. Please compare all of the four approaches and choose the one you MOST prefer on each screen.

Your actual experience will likely differ from the specifics we will show you. Please make your selection based only on the information provided.

There is no right or wrong answer. We are only interested in how you would react to the different approaches and characteristics.

Which of the following four approaches would you MOST prefer to resolve the service need <in yellow> “[service1]” </in yellow>?

[CREATE HYPERLINKS BASED ON Q19 TO Q22]

SYSTEM WILL CHOOSE RANDOM LEVELS FOR EACH ATTRIBUTE TO CREATE THE FIRST CONCEPT. SUBSEQUENT CONCEPTS WILL BE CREATED SUCH THAT THE LEVELS ARE NOT REPEATED. IN CASES WHERE THIS IS NOT POSSIBLE, THE LEVELS WILL BE REPEATED. UNDER NO CIRCUMSTANCES WILL THE SYSTEM CREATE TWO IDENTICAL PROFILES.

| IRS Tax Assistance Method      | METHODB1 | METHOD B2 | METHODB3 | METHODB4 |
|--------------------------------|----------|-----------|----------|----------|
| <u>Time Required</u>           |          |           |          |          |
| <u>Authentication</u>          |          |           |          |          |
| <u>Confirmation of Receipt</u> |          |           |          | NA       |
| <u>Information Required</u>    |          |           |          |          |
|                                | *        | *         | *        | *        |

[DISPLAY]

Thanks for those answers. We are almost at the end of the survey.

[GRID]

[SHOW HEADER AT TOP MIDDLE AND BOTTOM OF SCREEN]

[PROMPT IF SKIP]

### TAX ASSISTANCE CHOICE TASK FOR <SERVICE2>

**35a.** Now we would like you to imagine that you have a different tax related problem: <in yellow> [service2] </in yellow> and you would like to contact the IRS to resolve the issue.

Please select whether you'd use any of the following ways of getting assistance from the IRS, choosing always, sometimes, rarely, or never for each row. Please note that these methods are either currently available or may be available to you in the future.[Choose one response per row]

Always Sometimes Rarely Never

- Calling the Toll-Free line and talking with a live Customer Service Representative [Service2=Submit Receipt; Status of Case/Transaction; Sign a Document; Discuss Case Details; Get a Transcript; Ask Question]
- Calling the Toll-Free line and only using the automated voice menu responses [Service2=Status of Case/Transaction]
- Using an interactive tool on the IRS [www.irs.gov](http://www.irs.gov) website [Service2=Submit Receipt; Status of Case/Transaction; Sign a Document; Get a Transcript]
- Sending a letter to the IRS via regular mail [Service2=Submit a Receipt; Sign a Document]
- Using a smartphone application [Service2=Submit Receipt; Status of Case/Transaction; Sign a Document]
- Emailing the IRS through a secure messaging center [Service2=Submit Receipt; Status of Case/Transaction; Ask Question]
- Fax [Service2=Submit Receipt; Sign a Document]
- Sign up for automatic email notifications [Service2=Status of Case/Transaction]
- Go to a local IRS office [Service2=Status of Case/Transaction]

- Secure online chat [Service2=Submit Receipt; Status of Case/Transaction; Sign a Document; Ask Question]

**[SHOW IF MORE THAN 4 ITEMS WERE SELECTED IN ALWAYS, SOMETIMES, RARE IN Q35A]**

**35b1.** Of the following, which way are you MOST likely to use to get assistance from IRS to resolve this tax related problem: <in yellow> [service2] </in yellow>?

**35b2.** Of the following, which way are you MOST likely to use to get assistance from IRS?

[show items not selected in Q35b1]

**35b3.** Of the following, which way are you MOST likely to use to get assistance from IRS?

[show items not selected in Q35b2]

**35b4.** Of the following, which way are you MOST likely to use to get assistance from IRS?

[show items not selected in Q35b3]

**[DISPLAY]**

**CREATE DATA ONLY VARIABLE:**

**METHODB1**

**METHODB2**

**METHODB3**

**METHODB4**

**IF Q35b1-4 Not shown:**

- 1) if one item selected on Q35a, then METHODB1-4=one item
- 2) if two items selected on Q35a, then randomly assign the two items (twice each item) to METHODB1-4.
- 1) if three items selected on Q35a, then one of the items be repeated twice. Randomly assign the four items to METHODB1-4
- 2) if four items selected on Q35a, then randomly assign the four items to METHODB1-4
- 3) If no item selected on Q35a, then randomly select four methods



IF Q35b1-4 shown:

- 1) If Q35b1-4 not skipped, randomly assign answers from Q31b1-4 to METHODB1-4
- 2) If Q35b4 skipped, randomly assign answers from Q31b1-3 and one from the unselected remaining item from Q31b3 to METHODB1-4
- 3) If Q35b3 skipped, randomly assign answers from Q31b1-2 and two from the unselected remaining items from Q31b2 to METHODB1-4
- 4) If Q35b2 skipped, randomly assign answer from Q32b1 and three from the unselected remaining items from Q31b1 to METHODB1-4

Please continue to assume that your problem is: <in yellow> [service2] </in yellow>.

On each of next ten screens, we will show you four approaches to resolve this problem. Please compare the four approaches on each screen and choose the one you MOST prefer.

[RADIO]

[CREATE HYPERLINKS BASED ON Q19 TO Q22]

SYSTEM WILL CHOOSE RANDOM LEVELS FOR EACH ATTRIBUTE TO CREATE THE FIRST CONCEPT. SUBSEQUENT CONCEPTS WILL BE CREATED SUCH THAT THE LEVELS ARE NOT REPEATED. IN CASES WHERE THIS IS NOT POSSIBLE, THE LEVELS WILL BE REPEATED. UNDER NO CIRCUMSTANCES WILL THE SYSTEM CREATE TWO IDENTICAL PROFILES.

**36- 45.** Which of the following four approaches would you MOST prefer to resolve the service need <in yellow> “[service2]” </in yellow>?

| IRS Tax Assistance Method      | METHODB1 | METHOD B2 | METHODB3 | METHODB4 |
|--------------------------------|----------|-----------|----------|----------|
| <u>Time Required</u>           |          |           |          |          |
| <u>Authentication</u>          |          |           |          |          |
| <u>Confirmation of Receipt</u> |          |           |          | NA       |
| <u>Information Required</u>    |          |           |          |          |
|                                | *        | *         | *        | *        |

**[RADIO]**

46. Which authentication process would you prefer to complete before using IRS online services in order to prove your identity?

- authenticate one time (10 minutes) to create an account and then log in to that account for any future service (1 minute)
- authenticate each time you use an IRS online service by answering a series of questions (8 minutes each time)

**[RADIO]**

47. Imagine you send the IRS a signed document via secure email and receive an automated email reply from the IRS indicating that they have received the document and your account should reflect the document within 20 business days. How likely would you be to call the IRS about your signed document within that timeframe?

Very Likely   Likely   Somewhat Likely   Somewhat Unlikely   Unlikely   Very Unlikely

**[DISPLAY]**

You have reached the end of the survey. Thank you for participating in this research.

Your feedback is very valuable.

The Paperwork Reduction Act requires IRS to display an OMB Control Number (1545-1432) on all public information requests. If you have any comments regarding the time estimates associated with this study or suggestions for making this process simpler, please write to the Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, D.C 20224

