

**Attachments**

4 Surveys

1 Example of Survey Communication Pieces (Business Taxpayers)

Survey Pre-Notification Letter

Survey- Cover Letter [first package]

Reminder Postcard

Survey- Cover Letter [second package]

Individual Taxpayer Survey  
March 2014

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

**2014 Individual Taxpayer Survey  
Online Version**

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

**Revised: March 5, 2014**

## INTRODUCTION

Fors Marsh Group LLC is an independent research organization working with the IRS to obtain feedback on customer satisfaction. If you are an adult who deals with your household taxes, we invite you to take part in a brief voluntary survey about your satisfaction with some of the products and services the IRS offers for tax return preparation. The survey should take about 15 minutes to complete. Fors Marsh Group will not provide any identifying information to the IRS along with your responses and will hold your identity private to the extent permitted by law. We will not ask you about the details of your tax return itself. Your participation is very important to help the IRS design products and services that meet the needs of taxpayers.

To verify the authenticity of this survey, please visit IRS.gov and enter the search term 'customer surveys'. The IRS Customer Satisfaction Survey page contains a list of valid and current IRS surveys and as of this issuance should provide a reference to the W&I: CARE: M&P: Individual Taxpayer customer satisfaction survey.

You may also contact Patty Wagner at the IRS via phone at 202-283-0188 or by e-mail at patty.wagner@irs.gov as an alternative to verify sponsorship of the survey.

### Confidentiality and Security

Fors Marsh Group will hold your identity as anonymous as allowed by law and will only provide results to the IRS after combining them with other responses. In addition, Fors Marsh Group will provide the raw data to the IRS with all personally identifying information removed. Please feel confident that your answers will be used solely for the purpose stated above.

## SCREENER ITEMS

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

**[Single Punch]**

SCREENER\_1. Have you filed a FEDERAL INCOME TAX RETURN for 2012?

1. Yes. You or your spouse has filed a federal tax return for 2012.
2. No. Have not yet filed a federal income tax return for 2012.
3. No. Do not have to file a federal income tax return for 2012.

**///ASK IF SCREENER\_1=01///**

**///ELSE TERMINATE///**

**///IF TERMINATED SHOW FOLLOWING TEXT IN ADDITION TO CLOSING STATEMENT///**

[You are not eligible to participate in this survey because you have not yet filed or do not have to file a federal income tax return for 2012.]

[Single Punch]

SCREENER\_2. Who prepared your 2012 federal income tax return?

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

**///ASK IF SCREENER\_2=01///**

**///ELSE TERMINATE///**

**///IF TERMINATED SHOW FOLLOWING TEXT IN ADDITION TO CLOSING STATEMENT///**

[You are not eligible to participate in this survey because someone other than you or another family member in your household prepared your 2012 federal income tax return.]

[Single Punch]

SCREENER\_3. Are you familiar enough with your federal income tax return for 2012 to answer some questions about it?

1. Yes
0. No
98. I don't know/remember

## **OVERALL RATING**

**///ASK IF SCREENER\_3=01///**

**///ELSE TERMINATE///**

**///IF TERMINATED SHOW FOLLOWING TEXT IN ADDITION TO CLOSING STATEMENT///**

[You are not eligible to participate in this survey because you are not familiar enough with your 2012 federal income tax return to answer some questions about it.]

OVR\_1. Overall, how would you rate the IRS on forms, instructions, publications, and other tax products that it develops, produces, and distributes to taxpayers?

1. Very dissatisfied
2. Dissatisfied

3. Neither satisfied nor dissatisfied
4. Satisfied
5. Very satisfied

## PREPARATION/FILING

///ASK ALL///

[Single Punch]

PREP\_1. How did you prepare your 2012 federal income tax return?

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

///ASK IF PREP\_1=01///

///ELSE SKIP TO PREP\_5///

[Single Punch]

PREP\_2. Which of the following best describes the software or method you used?

1. Online commercial software
2. Commercial software installed on PC
3. Commercial software installed on a Mac
4. Free File (free online software on IRS.gov)
5. Free File using Free File Fillable Forms accessed from the [www.irs.gov/freefile](http://www.irs.gov/freefile) page
6. Printed IRS forms from the IRS website, then filled them out by hand
7. Downloaded the IRS forms, filled them in electronically, saved, and printed them
8. Other. Please describe: \_\_\_\_\_

[Single Punch]

PREP\_3. Please indicate which of the following best describes how you viewed actual IRS tax forms while using tax preparation software.

1. I looked at the actual IRS form when determining what to enter as input to my software program
2. The first time I saw the actual form was after I finished and printed or viewed my completed form
3. I never looked at a hard copy or PDF of the IRS form. I relied completely on the software interface to complete and submit my return
4. I did not view any IRS tax forms online
5. Other. Please describe when and how you used the IRS form: \_\_\_\_\_

[Single Punch]

PREP\_4. After your forms were completed, how did you file your most recent tax return?

- 1. I filed by regular mail.
- 2. I filed electronically by computer.
- 3. Delivered in person.
- 98. I don't know/remember.

[Single Punch]

PREP\_5. Which of the following federal tax forms did you use when you filed your 2012 tax return?

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

## FORMS EVALUATION

///ASK IF PREP\_5=01///

///ELSE SKIP TO PUB\_1///

[Grids, Single Punch]

FORM\_1. Please rate your satisfaction with each of the following schedules and forms that you used.

- A. Schedule A for itemized deductions
- B. Schedule B for interest and dividend income
- C. Schedule C for small business income
- D. Schedule D for capital gains and losses
- E. Schedule E for supplemental income
- G. Schedule EIC for Earned Income Credit
- H. Form 4562 Depreciations and Amortization
- K. Form 8863 for Education Credits (American Opportunity for Lifetime Learning Credits)
- L. Form 8949 Sales and Other Dispositions of Capital Assets
- M. Other, please specify: \_\_\_\_\_

01	02	03	04	05	98	99	-100
Very Dissatisfied				Very Satisfied	Not applicable/Di	Refused	Valid

					<b>d not use</b>		<b>Skip</b>
--	--	--	--	--	------------------	--	-------------

[Grids, Single Punch]

FORM\_2. Thinking about the tax forms, publications, and instructions that you used for filing your 2012 tax return, please rate your satisfaction with the following.

- A. Knowing where to find tax forms and instructions
- B. The ease of getting tax forms and instructions
- C. The ease of determining which forms and instructions you needed
- D. The ease of understanding tax forms
- E. Knowing what you needed to do to complete the forms
- F. The completeness of instructions
- G. The ease of understanding the instructions
- H. The ease of finding answers in the publications

<b>01</b>	<b>02</b>	<b>03</b>	<b>04</b>	<b>05</b>	<b>98</b>	<b>99</b>	<b>-100</b>
<b>Very Dissatisfied</b>				<b>Very Satisfied</b>	<b>Not applicable/Did not use</b>	<b>Refused</b>	<b>Valid Skip</b>

///ASK IF ANY FORM\_2A—FORM\_2H=01, 02///

[Open-End]

FORM\_2\_open. For those statements that you marked 'Very Dissatisfied' or 'Dissatisfied', please explain why.

[TEXT BOX]

## PUBLICATION EVALUATION

For the following set of questions, please think about the tax publications you used to prepare your 2012 individual federal tax return.

///ASK ALL///

[Single Punch]

PUB\_1. Did you use any IRS publications in preparing your 2012 federal tax return?

- 1. Yes
- 0. No
- 98. I don't know/remember

///ASK IF PUB\_1=01///  
 ///ELSE SKIP TO WEB\_1///

[Grids, Single Punch]

PUB\_2. Which of the following IRS publications have you used in preparing your 2012 federal tax return?

- A. Pub 501 – Exemptions, Standard Deductions and Filing Instructions
- B. Pub 502 – Medical and Dental Expenses
- C. Pub 505 – Tax Withholding and Estimated Tax
- D. Pub 525 – Taxable and Nontaxable Income
- E. Pub 535 – Business Expenses
- F. Pub 550 – Investment Income and Expenses
- G. Pub 590 – Individual Retirement Arrangements (IRAs)
- H. Pub 596 – Earned Income Credit
- I. Pub 970 – Tax Benefits for Education
- J. Other, please specify: \_\_\_\_\_

<b>1</b>	<b>2</b>	<b>98</b>	<b>99</b>	<b>-100</b>
<b>Used publication</b>	<b>Did not use publication</b>	<b>I don't know/remember</b>	<b>Refused</b>	<b>Valid Skip</b>

///INCLUDE RESPONSE OPTIONS FOR ANY PUB\_2A—PUB\_2J=01///  
 ///IF ALL PUB\_2A—PUB\_2J≠01 SKIP TO PUB\_5///

[Single Punch]

PUB\_3. Of the publications you indicated using to prepare your 2012 federal tax return, which one did you use most?

- 1. Pub 501 – Exemptions, Standard Deductions and Filing Instructions
- 2. Pub 502 – Medical and Dental Expenses
- 3. Pub 505 – Tax Withholding and Estimated Tax
- 4. Pub 525 – Taxable and Nontaxable Income
- 5. Pub 535 – Business Expenses
- 6. Pub 550 – Investment Income and Expenses
- 7. Pub 590 – Individual Retirement Arrangements (IRAs)
- 8. Pub 596 – Earned Income Credit
- 9. Pub 970 – Tax Benefits for Education
- 10. Other, please specify: \_\_\_\_\_

[Single Punch]

PUB\_4. How would you rate your overall satisfaction with [insert PUB\_3 response]?



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

**[Multi Punch]**

PUB\_5. Where did you get the publication(s) that you used for your 2012 federal income tax return? If you obtained these publications from different sources, please tell us all the sources.

1. IRS office
2. IRS website
3. Tax preparation software or computer program
4. Library
5. Other, please specify: \_\_\_\_\_

## **WEBSITE AND ELECTRONIC FORMS EVALUATION**

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

**[Single Punch]**

WEB\_1. Approximately how many times did you access the IRS website to get forms, instructions, or publications for filing your 2012 tax return?

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

**///ASK IF WEB\_1≠01///**

**///IF WEB\_1=01 SKIP TO WEB\_4///**

**[Single Punch]**

WEB\_2. How would you rate your overall satisfaction with getting tax forms, publications, and instructions from the IRS website?

1. Very dissatisfied
2. Dissatisfied
3. Neither satisfied nor dissatisfied
4. Satisfied
5. Very satisfied
98. Not applicable/Did not use website

[Single Punch]

WEB\_3. While visiting the IRS website to get forms, instructions, and/or publications for filing your 2012 tax return, did you notice the website’s new format?

- 1. Yes
- 0. No

///ASK IF WEB\_3=01///

///ELSE SKIP TO WEB\_4///

[Open-End]

WEB\_3\_open. What did you like/dislike about the IRS website’s new format? Please explain why.

[TEXT BOX]

[Single Punch]

WEB\_4. Do you have a need for multilingual tax information?

- 01. Yes
- 00. No

///ASK IF WEB\_4=01///

///ELSE SKIP TO ELEC\_1///

[Grids, Single Punch]

WEB\_5. The IRS hosts several multilingual webpages on irs.gov that provide tax information for taxpayers that do not speak English well or at all.

Were you aware that the IRS had a...

- A. Spanish webpage (www.IRS.gov/Spanish)
- B. Chinese webpage (www.IRS.gov/Chinese)
- C. Vietnamese webpage (www.IRS.gov/Vietnamese)
- D. Korean webpage (www.IRS.gov/Korean)
- E. Russian webpage (www.IRS.gov/Russian)

<b>1</b>	<b>2</b>	<b>3</b>	<b>99</b>	<b>-100</b>
<b>No, I was not aware</b>	<b>Yes, but I have not used it</b>	<b>Yes, I have used it</b>	<b>Refused</b>	<b>Valid Skip</b>

///ASK WEB\_6 IF ANY WEB\_5A-WEB\_5E=03///

///**SKIP TO WEB\_7 IF ALL WEB\_5A-WEB\_5E≠03**///  
[Single Punch]

WEB\_6. Thinking of the multilingual webpage(s) that you used, how would you rate your satisfaction?

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

///**ASK ALL**///  
[Open-End]

WEB\_7. What can the IRS do to better market the multilingual webpages?

[TEXT BOX]

## **ELECTRONIC DOCUMENTS**

[Single Punch]

ELEC\_1. Have you ever used an electronic version of any federal tax form on the IRS website?

1. Yes
0. No
98. I don't know/remember

///**ASK IF ELEC\_1=01**///  
///**ELSE SKIP TO ELEC\_3**///  
[Single Punch]

[Single Punch]

ELEC\_2. Which of the following electronic tax forms have you completed or used?

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

[Single Punch]

ELEC\_3. Have you ever used an electronic version of any federal tax publication on the IRS website?

1. Yes
0. No
98. I don't know/remember

///ASK IF ELEC\_3=01///

///ELSE SKIP TO MARK\_1///

[Multi Punch]

ELEC\_4. Please mark all of the electronic publications you have used.

- 1. Pub 463 - *Travel, Entertainment, Gift and Car Expenses*
- 2. Pub 501 - *Exemptions, Standard Deductions and Filing Instructions*
- 3. Pub 502 - *Medical and Dental Expenses*
- 4. Pub 505 - *Tax Withholding and Estimated Tax*
- 5. Pub 523 - *Selling Your Home*
- 6. Pub 525 - *Taxable and Nontaxable Income*
- 7. Pub 535 - *Business Expenses*
- 8. Pub 550 - *Investment Income and Expenses*
- 9. Pub 590 - *Individual Retirement Arrangements (IRAs)*
- 10. Pub 596 - *Earned Income Credit*
- 11. Pub 946 - *How to Depreciate Property*
- 12. Pub 970 - *Tax Benefits for Education*
- 13. Other, please specify: \_\_\_\_\_

///ASK IF ELEC\_3=01///

///ELSE SKIP TO MARK\_1///

[Grids, Single Punch]

ELEC\_5. When you used the publication(s) online at the IRS website, did you experience problems with any of the sections that you used in electronic format/version of the publication(s)?

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

1	0	98	99	-100
Yes, I experienced a problem	No, I did not experience a problem	Not applicable/Did not use	Refused	Valid Skip

# MARKETING

///ASK ALL///

[Single Punch]

MARK\_1. Have you used your mobile device or tablet to access tax products (e.g., forms, publications, instructions) in the past?

- 1. Yes
- 0. No

///ASK IF MARK\_1=01///

///ELSE SKIP TO MARK\_3///

[Grids, Single Punch]

MARK\_2. What mobile device have you used to read IRS tax products and information?

- A. Smart Phone
- B. Tablet
- C. eBook Reader

<b>1</b>	<b>0</b>	<b>99</b>	<b>-100</b>
<b>Yes</b>	<b>No</b>	<b>Refused</b>	<b>Valid Skip</b>

[Single Punch]

MARK\_3. If more tax products were made available for use on mobile devices, how likely would you be to use them?

- 1. Very unlikely
- 2. Unlikely
- 3. Neither likely nor unlikely
- 4. Likely
- 5. Very likely

[Single Punch]

MARK\_4. How satisfied are you with getting information on tax law changes for your 2012 tax return?

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

- 5. Very Satisfied
- 98. Not aware of any tax law changes

///**ASK IF MARK\_4=01-05**///

///**ELSE SKIP TO MARK\_6**///

[Grids, Single Punch]

MARK\_5. Please indicate whether you found out about changes in tax forms and publications through any of the following sources.

- A. IRS website
- B. IRS workshop
- C. Professional association
- D. Word of mouth
- E. Software programs
- F. TV, radio, or print advertisements
- G. Tax preparer
- H. Other, please specify: \_\_\_\_\_

<b>1</b>	<b>0</b>	<b>98</b>	<b>99</b>
<b>Yes</b>	<b>No</b>	<b>I don't know/remember</b>	<b>Refused</b>

[Single Punch]

MARK\_6. How satisfied are you with the way the IRS communicates changes in its forms, instructions, and publications to its customers?

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

///**ASK IF MARK\_6=01, 02**///

///**ELSE SKIP TO MARK\_8\_open**///

[Open-End]

MARK\_7\_open. How can the IRS improve your satisfaction with the way it handles tax law changes in the forms, instructions, and publications used when filing?

[TEXT BOX]

[Open-End]

MARK\_8\_open. What can the IRS do to improve the tax forms, instructions, and publications that would make compliance with filing taxes easier?

[TEXT BOX]

## CLOSE

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

### *Paperwork Reduction Act Notice*

*The Paperwork Reduction Act requires that the IRS provide an OMB control number relating to all public information requests along with the address where you can send comments regarding the survey. The OMB number for this survey is 1545-1432. If you have any comments regarding this survey, please write to: IRS, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, Room 6526, 1111 Constitution Avenue, NW, Washington, DC 20224.*

### *Privacy Statement*

*The authority requesting the information is 5 USC 301. The primary purpose of asking for the information is to determine steps the IRS can take to improve our services to you. The information may be disclosed as authorized by the routine uses published for the Privacy Act System of Records entitled, Treas/IRS 00.001 Correspondence Files, including Stakeholder Partnership File, and Correspondence Control Files, as published in the Federal Register: December 10, 2001 (Volume 66, Number 237) [Notices] pages 63785-6. Providing the information is voluntary. Not answering some or all of the questions will not affect you.*

Customer Satisfaction Survey for External Customers of Media and  
Publications Division

**2014 Forms Distribution Survey  
Web Version**

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



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

This survey should take no longer than 10 minutes.

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

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

#### Privacy to the Extent Allowed by Law and Security

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

#### **Paperwork Reduction Act Notice**

*The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is 1545-1432. If you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to: Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, room 6526, 1111 Constitution Ave. NW, Washington, DC 20224.*

#### **Privacy Statement**

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#### **CUSTOMER CLASSIFICATION**

1. What is your primary relationship to the IRS? Are you .... ? Please check only one
  - Tax Forms Outlet Program (TFOP)
  - Community Based Outlet Program (CBOP)

- International Program (INTL)
- Other Please specify \_\_\_\_\_
- Don't know

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

2a What is your zip code?

**TAX PRODUCT ORDERING AND FULFILLMENT**

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

4. How did you order the federal tax forms, instructions, publications or other federal tax products for the most current tax year? *Please select all that apply.*

- E-Order (E-mail) **[If checked, include Q5; otherwise, skip Q5]**
- Telephone **[If checked, include Q6; otherwise, skip Q6]**
- Other. Please specify \_\_\_\_\_

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

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

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

- 8. Please list the products that you did not receive.  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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

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

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

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

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

*Please check all that apply.*

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

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

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

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

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

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

17. Are you aware of ways that the IRS informs you of product delivery status?

- Yes
- No

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

- Internet
- E-Mail
- Mail
- Other Please specify \_\_\_\_\_

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

- Yes
- No **[Skip to Q22]**

Don't know **[Skip to Q22]**

20. Did receiving multiple shipments present any challenges or difficulties for you?

- Yes
- No **[Skip to Q22]**

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

\_\_\_\_\_

22. Did you receive the most current federal tax products you ordered in good usable condition?

- Yes **[Skip to Q27]**
- No

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

\_\_\_\_\_

24. When you did not receive the federal tax products that you ordered in usable condition, which of the following did you do? *Please check all that apply.*

- Called the IRS
- Downloaded product from the web
- Called or e-mailed the Tax Forms Outlet Program (TFOP)
- Called the Community Based Outlet Program (CBOP)
- Called or e-mailed the International Program (INTL)
- Did nothing
- Other, please specify \_\_\_\_\_

25. How would you rate your experience with reaching the IRS (CBOP/TFOP/International Program) about the defective product?

- 5 - Very easy **[Skip to Q27]**
- 4 - Easy **[Skip to Q27]**
- 3 - Neither Easy nor Difficult **[Skip to Q27]**
- 2 - Difficult
- 1 - Very difficult

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

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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

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

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

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

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

- Yes
- No
- Don't Know

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

**IRS Media and Publication Division  
2014 Tax Preparer Survey**

**Online Version**

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

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

///PROGRAMMER: IF TEXT ON THIS DOCUMENT IS BOLDED, IT SHOULD BE BOLDED ON THE WEB SCREEN AS WELL///

///PROGRAMMER: PLEASE INCLUDE A PREVIOUS AND NEXT BUTTON ON EACH PAGE///

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

**//ASK ALL//**

**Web Introduction**

Welcome to the IRS Media and Publications Division customer satisfaction survey. Fors Marsh Group LLC, an independent research organization, is working with the IRS to obtain your feedback as a tax preparer about forms, publications, and services that are used to assist customers in understanding, preparing, and filing federal income tax returns.

This survey should take no longer than 15 minutes.

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

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

**//ASK ALL//**

**Private to the Extent Allowed by Law and Security**

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

*Paperwork Reduction Act Notice*

*The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is 1545-1432. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to: Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20004*

*Privacy Statement*

*The authority requesting the information is 5 USC 301. The primary purpose of asking for the information is to determine steps IRS can take to improve our service to you. The information may be disclosed as authorized by the routine uses published for the Privacy Act System of Records entitled, Treas/IRS 00.001 Correspondence Files, including Stakeholder Partnership File, and Correspondence Control Files, as published in the Federal Register: December 10, 2001 (Volume 66, Number 237) [Notices] pages 63785-6. Providing the information is*



//ASK ALL//

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

- 01 Less than 100
- 02 100-299
- 03 300-499
- 04 500 or More
- 98 Not sure

//ASK ALL//

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

- 01 Less than 10
- 02 10-49
- 03 50-99
- 04 100 or More
- 98 Not sure

**TAX FORMS**

//ASK ALL//

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

		Never	Rarely	Sometimes	Frequently
		01	02	03	04
Q3A.	Long form 1040	0	0	0	0
Q3B.	Form 1040-ES	0	0	0	0
Q3C.	Form 1040 A	0	0	0	0
Q3D.	Form 941	0	0	0	0
Q3E.	Form 1065	0	0	0	0
Q3F.	Form 1120	0	0	0	0
Q3G.	Form 1120S	0	0	0	0
Q3H.	Form 4562 Depreciation and Amortization	0	0	0	0
Q3I.	Form 6251 Alternative minimum tax (individuals)	0	0	0	0
Q3J.	Schedule A for itemized deductions	0	0	0	0
Q3K.	Schedule B for interest and dividend income	0	0	0	0
Q3L.	Schedule C or C-EZ for small business income	0	0	0	0
Q3M.	Schedule D for capital gains or losses	0	0	0	0
Q3N.	Schedule E for rent or royalty income (page 1)	0	0	0	0

Q3O.	Schedule E for income from a partnership, S corporation, or trust (page 2)	0	0	0	0
Q3P.	Schedule SE	0	0	0	0
Q3Q.	Form 8863 for Education Credits (American Opportunity and Lifetime Learning Credits)	0	0	0	0

//ASK IF ANY Q3A-Q3P ≠ 1//

//ONLY DISPLAY FORMS THAT ≠ 1//

Q4. Thinking about ease of use, ease of understanding, and design, how would you rate the following forms?

		Very Poor	Poor	Neutral	Good	Very Good
		01	02	03	04	05
Q4A.	Long form 1040	0	0	0	0	0
Q4B.	Form 1040-ES	0	0	0	0	0
Q4C.	Form 1040 A	0	0	0	0	0
Q4D.	Form 941	0	0	0	0	0
Q4E.	Form 1065	0	0	0	0	0
Q4F.	Form 1120	0	0	0	0	0
Q4G.	Form 1120S	0	0	0	0	0
Q4H.	Form 4562 Depreciation and Amortization	0	0	0	0	0
Q4I.	Form 6251 Alternative minimum tax (individuals)	0	0	0	0	0
Q4J.	Schedule A for itemized deductions	0	0	0	0	0
Q4K.	Schedule B for interest and dividend income	0	0	0	0	0
Q4L.	Schedule C or C-EZ for small business income	0	0	0	0	0
Q4M.	Schedule D for capital gains or losses	0	0	0	0	0
Q4N.	Schedule E for rent	0	0	0	0	0

	or royalty income (page 1)					
Q4O.	Schedule E for income from a partnership, S corporation, or trust (page 2)	0	0	0	0	0
Q4P.	Schedule SE	0	0	0	0	0
Q4Q.	Form 8863 for Education Credits (American Opportunity and Lifetime Learning Credits)	0	0	0	0	0

//ASK ALL//

Q5. In thinking about your recent experience with federal tax forms, instructions, and publications, tell me whether you agree or disagree with the following statements?

		Strongly Disagree 01	Disagree 02	Neither Agree or Disagree 03	Agree 04	Strongly Agree 05	Don't Know/ N/A 98
Q5G.	The graphics and layout made it easy to follow	0	0	0	0	0	0
Q5H.	The size of the print made it easy to read	0	0	0	0	0	0
Q5C.	It was easy to go back and forth between the instructions and the tax form	0	0	0	0	0	0
Q5I.	The section headings were useful	0	0	0	0	0	0
Q5E.	The publication was as clear as possible, given the tax law	0	0	0	0	0	0
Q5K.	The forms made it more difficult to make accurate calculations	0	0	0	0	0	0
Q5B.	It was easy to understand the instructions for the form.	0	0	0	0	0	0
Q5A.	It was easy to understand the forms.	0	0	0	0	0	0
Q5D.	It was easy to find answers in the publications.	0	0	0	0	0	0

Q5F.	It was easy to go back and forth between the publication and instructions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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///PROGRAMMER: If all selections Q4A-Q4Q ≠ 1 or 2, Skip to Q7///

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

///ASK IF Q4A-Q4Q = 01 OR 02///

Q6. Please tell us how any of the forms you rated as 'Very Poor' or 'Poor' could be improved.

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

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**TAX INSTRUCTIONS**

//ASK ALL//

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

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

**PUBLICATIONS**

//ASK ALL//

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

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

//ASK IF ANY IN Q8 >1//

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

		Very Poor 01	Poor 02	Neutral 03	Good 04	Very Good 05	Don't Know N/A 98
Q9A.	Table of contents	0	0	0	0	0	0
Q9B.	Important changes	0	0	0	0	0	0
Q9C.	Index	0	0	0	0	0	0
Q9D.	Worksheet	0	0	0	0	0	0
Q9E.	Examples	0	0	0	0	0	0
Q9F.	Flow charts	0	0	0	0	0	0
Q9G.	Appendix	0	0	0	0	0	0
Q9H.	Tax tables	0	0	0	0	0	0

Q9I.	Tips	0	0	0	0	0	0
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// ASK IF ANY IN Q8 >1//  
 //ONLY SHOWQ8>1//

Q10. Thinking about your overall satisfaction, how would you rate each of the following publications?

		Very Poor 01	Poor 02	Neutral 03	Good 04	Very Good 05
Q10A	Pub 17 - <i>Your Federal Income Tax</i>	0	0	0	0	0
Q10B	Pub 463 - <i>Travel, Entertainment, Gift, and Car Expenses</i>	0	0	0	0	0
Q10C	Pub 501 - <i>Exemptions, Standard Deductions, and Filing Instructions</i>	0	0	0	0	0
Q10D	Pub 502 - <i>Medical and Dental Expenses</i>	0	0	0	0	0
Q10E	Pub 505 - <i>Tax Withholding and Estimated Tax</i>	0	0	0	0	0
Q10F	Pub 523 - <i>Selling Your Home</i>	0	0	0	0	0
Q10G	Pub 525 - <i>Taxable and Nontaxable Income</i>	0	0	0	0	0
Q10H	Pub 535 - <i>Business Expenses</i>	0	0	0	0	0
Q10I	Pub 550 - <i>Investment Income and Expenses</i>	0	0	0	0	0
Q10J	Pub 590 - <i>Individual Retirement Arrangements (IRAs)</i>	0	0	0	0	0
Q10K	Pub 596 - <i>Earned Income Credit</i>	0	0	0	0	0
Q10L	Pub 946 - <i>How to Depreciate Property</i>	0	0	0	0	0
Q10M	Pub 970 - <i>Tax Benefits for Education</i>	0	0	0	0	0
Q10N	Another Publication (Please Specify)	0	0	0	0	0

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

///ASK IF Q10A-Q10N = 01 OR 02///

Q11. Please tell us how any of the publications you rated as 'Very Poor' or 'Poor' could be improved.

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

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//ASK IF Q8A ≠ 1//

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

		Never 01	Rarely 02	Occasional 03	Frequently 04	Very Frequently 05	Unaware product/service was available
Q12A	The Income Tax Return- including filing status, personal exemptions, and dependents	0	0	0	0	0	
Q12B	Income- including wages, tips, dividends, pensions, and social security income, etc.	0	0	0	0	0	
Q12C	Gains and Losses- including basis of property, selling your home, gains and losses, etc.	0	0	0	0	0	
Q12D	Adjustments to Income- including alimony, IRAs, and education-related adjustments	0	0	0	0	0	
Q12E	Standard Deduction and Itemized Deductions- including medical care, interest deductions, and taxes, etc.	0	0	0	0	0	
Q12F	Figuring Your Taxes and Credits- including child and dependent care expenses, earned income credit, education credits, etc.	0	0	0	0	0	
Q12G	Tax Tables and Tax Rate Schedule	0	0	0	0	0	

**MARKETING**

//ASK ALL//

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

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

//ASK ALL//

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

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

//ASK ALL//

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

	Yes	No
Q15_1 IRS website	<input type="radio"/>	<input type="radio"/>
Q15_2 Taxpayer Assistance Center (TAC) or Volunteer Income Tax Assistance (VITA)	<input type="radio"/>	<input type="radio"/>
Q15_3 IRS Tax Forums	<input type="radio"/>	<input type="radio"/>
Q15_4 Professional association	<input type="radio"/>	<input type="radio"/>
Q15_5 Word of mouth	<input type="radio"/>	<input type="radio"/>
Q15_6 Software programs	<input type="radio"/>	<input type="radio"/>
Q15_7 TV, radio, or print advertisements	<input type="radio"/>	<input type="radio"/>



Q15\_8 Other (Please specify) \_\_\_\_\_ 0 0

Q15\_98 Not sure 0

**OVERALL RATING**

//ASK ALL//

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

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

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

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

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

**2014 Business Taxpayer Survey**

**Online Version**

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

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

///PROGRAMMER: IF TEXT ON THIS DOCUMENT IS BOLDED, IT SHOULD BE BOLDED ON THE WEB SCREEN AS WELL///

///PROGRAMMER: PLEASE INCLUDE A PREVIOUS AND NEXT BUTTON ON EACH PAGE///

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

//ASK ALL//

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//ASK ALL//

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

- 01 Yes
- 02 No
- 03 Not Sure

//IF Q1= 02 OR Q1=03

SOFT PROMPT "Are you sure that your business did not file a 2010 federal income tax return?"//

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

SCREEN OUT

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

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

	Yes 01	No 02
Q3_1 1120 for a Corporation	<input type="radio"/>	<input type="radio"/>
Q3_2 1120S for an S Corp	<input type="radio"/>	<input type="radio"/>
Q3_3 1065 for a Partnership	<input type="radio"/>	<input type="radio"/>
Q3_4 1065B for a Partnership	<input type="radio"/>	<input type="radio"/>
Q3_5 1040 Schedule C for an Individual	<input type="radio"/>	<input type="radio"/>
Q3_6 1040 Schedule C-EZ for an Individual	<input type="radio"/>	<input type="radio"/>
Q3_7 1040 Schedule E for an Individual	<input type="radio"/>	<input type="radio"/>
Q3_8 1040 Schedule F for an Individual	<input type="radio"/>	<input type="radio"/>
Q3_9 Other (Please specify)_____	<input type="radio"/>	<input type="radio"/>
Q3_10 Not sure	<input type="radio"/>	

Q4. Who prepared your business's 2010 federal tax return? Please select one.

- 01 You or someone else in your business
- 02 Professional tax preparer (includes Accountant, CPA, Enrolled Agent or other tax preparers)
- 03 Someone else (Please specify) \_\_\_\_\_
- 04 Not sure

Q5. How did you or your preparer prepare your business income tax return?

- 01 Prepared using paper IRS forms

- 02 Prepared return using software (electronically)
- 03 Not sure

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

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

Q7. Did your business pay estimated taxes in 2010?

- 01 Yes
- 02 No
- 03 Not sure

//ASK IF Q7=01//

Q8. How did you determine your estimated tax payments in 2010?

- 01 Tried to accurately estimate the required payment based on this year's data
- 02 Based it on safe harbor of paying 100% of prior year taxes
- 03 Not sure

**TAX FORMS, INSTRUCTIONS AND PUBLICATIONS**

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

	Yes 01	No 02
Q9_1 IRS office	<input type="radio"/>	<input type="radio"/>
Q9_2 IRS website	<input type="radio"/>	<input type="radio"/>
Q9_3 Other Website	<input type="radio"/>	<input type="radio"/>
Q9_4 Tax preparation software or computer program	<input type="radio"/>	<input type="radio"/>
Q9_5 Accountant or tax preparer	<input type="radio"/>	<input type="radio"/>
Q9_6 Library	<input type="radio"/>	<input type="radio"/>
Q9_7 Post office	<input type="radio"/>	<input type="radio"/>
Q9_8 Other (Please specify) _____	<input type="radio"/>	<input type="radio"/>
Q9_9 None of these	<input type="radio"/>	

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

01 Yes

02 No

//ASK IF Q10=01//

Q10a. If yes, which electronic tax form(s) did you use? \_\_\_\_\_

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

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

**PUBLICATIONS**

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

		Used Printed Publication 01	Used Electronic Publication 02	Did Not Use 03
Q12A.	Pub 15 - <i>Circular E, Employer's Tax Guide</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Q12B.	Pub 509 - <i>Tax Calendars for 2010</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Q12C.	Pub 544 - <i>Sales and Other</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Q12D.	Pub 946 - <i>How To Depreciate Property</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q12E	Pub 17 - <i>Your Federal Income Tax</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Q12F	Other ( <i>Please specify</i> ) _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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

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

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

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

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

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

		Very Dissatisfied 01	Dissatisfied 02	Somewhat Satisfied 03	Satisfied 04	Very Satisfied 05
Q14A	Pub 15 - <i>Circular E, Employer's Tax Guide</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Q14B	Pub 509 - <i>Tax Calendars for</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	2013					
Q14C	Pub 544 - <i>Sales and Others</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Q14D	Pub 946 - <i>How to Depreciate Property</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Q14E	Pub 17 - <i>Your Federal Income Tax</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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

		Pub 15	Pub 509	Pub 544	Pub 946	Other	N/A
Q15A	Used Most Often	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Q15B	Used 2 <sup>nd</sup> Most Often	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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

		Yes 01	No 02
Q16_1.	Tax form instructions referred me to it	<input type="radio"/>	<input type="radio"/>
Q16_2.	List of publications in instructions	<input type="radio"/>	<input type="radio"/>
Q16_3.	IRS website	<input type="radio"/>	<input type="radio"/>
Q16_4.	From doing taxes in previous years	<input type="radio"/>	<input type="radio"/>
Q16_5.	IRS mailed it to me	<input type="radio"/>	<input type="radio"/>
Q16_6.	From my tax preparer	<input type="radio"/>	<input type="radio"/>
Q16_7.	Other (Please specify) _____	<input type="radio"/>	<input type="radio"/>

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

		Yes 01	No 02
Q17_1.	Tax form instructions referred me to it	<input type="radio"/>	<input type="radio"/>



Q17_2.	List of publications in instructions	<input type="radio"/>	<input type="radio"/>
Q17_3.	IRS website	<input type="radio"/>	<input type="radio"/>
Q17_4.	From doing taxes in previous years	<input type="radio"/>	<input type="radio"/>
Q17_5.	IRS mailed it to me	<input type="radio"/>	<input type="radio"/>
Q17_6.	From my tax preparer	<input type="radio"/>	<input type="radio"/>
Q17_7.	Other (Please specify) _____	<input type="radio"/>	<input type="radio"/>

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

//PIPE IN RESPONSE FROM Q15A=1-4 OTHER WISE LEAVE BRAKETED TEXT AS IS//

Q18. For [the publication you used **most often**], how would you rate each of the following aspects?

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

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

//PIPE IN RESPONSE FROM Q15A=1-4 OTHER WISE LEAVE BRAKETED TEXT AS IS//

Q19. In thinking about your experience with [the publication you used MOST OFTEN], to what extent do you agree or disagree with the following statements.

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

Q19H.	The forms made it easy to make accurate calculations.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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//ASK IF AT LEAST 1 SELECTION IN Q12=01, 02 //  
 //PIPE IN RESPONSE FROM Q15A=1-4 OTHER WISE LEAVE BRAKETED TEXT AS IS//  
 Q20. How could [the publication you used most often] be improved?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**IRS WEBSITE**

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

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

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

	Yes 01	No 02
Q23_1 View a specific form	<input type="radio"/>	<input type="radio"/>
Q23_2 Download a specific form	<input type="radio"/>	<input type="radio"/>
Q23_3 View a specific publication	<input type="radio"/>	<input type="radio"/>
Q23_4 Download a specific publication	<input type="radio"/>	<input type="radio"/>
Q23_5 View instructions	<input type="radio"/>	<input type="radio"/>
Q23_6 Download instructions	<input type="radio"/>	<input type="radio"/>
Q23_7 Get an answer to a tax question	<input type="radio"/>	<input type="radio"/>
Q23_8 See what changes had been made in tax laws	<input type="radio"/>	<input type="radio"/>
Q23_9 Find out how to get help with your taxes	<input type="radio"/>	<input type="radio"/>
Q23_10 Other (Please specify) _____	<input type="radio"/>	<input type="radio"/>
Q23_11 Did not access IRS website in the past year	<input type="radio"/>	

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

- 01 Yes
- 02 No

//ASK IF Q21≠01//

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

	Very Dissatisfied 01	Dissatisfied 02	Somewhat Satisfied 03	Satisfied 04	Very Satisfied 05
Q24A. Tax Forms	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Q24B. Instructions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Q24C. Publications	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**MARKETING**

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

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

	Yes 01	No 02
Q25A. Tax Forms	<input type="radio"/>	<input type="radio"/>
Q25B. Instructions	<input type="radio"/>	<input type="radio"/>
Q25C. Publications	<input type="radio"/>	<input type="radio"/>
Q25D. Tax Laws	<input type="radio"/>	<input type="radio"/>

//ASK IF ANY OF ITEMS IN Q25 = 01//

//ONLY SHOW ITEMS IN Q25=01//

What changes have you noticed?

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

//ASK IF ANY OF ITEMS IN Q25 = 01//

//ONLY SHOW ITEMS IN Q25=01//

Q26. For the 2010 tax filing season, how satisfied are you with the changes which have occurred in each of the following areas?

	Very Dissatisfied 01	Dissatisfied 02	Somewhat Satisfied 03	Satisfied 04	Very Satisfied 05
Q26A. Tax Forms	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Q26B. Instructions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Q26C. Publications	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Q26D. Tax Laws	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

//ASK ALL/

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

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

//ASK ALL/

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

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

**OVERALL RATING**

//ASK ALL//

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

01 Very Dissatisfied

02 Dissatisfied

03 Neither Satisfied Nor Dissatisfied

04 Satisfied

05 Very Satisfied

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

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

**M&P 2014 Business Taxpayers Survey  
Pre-notification Letter**

[IRS LOGO]

[IRS DEPARTMENT LETTERHEAD]

[DATE]

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

Dear [INSERT NAME]:

I am asking for your help in improving the level of service the IRS provides businesses. I invite you to take part in a survey asking for your opinions about the resources available to you when you prepare the tax returns for your business.

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

Fors Marsh Group will not provide any identifying information to the IRS along with your responses and will hold your identity private to the extent permitted by law. Your responses will be reported to the IRS only in aggregate with the responses from other businesses.

We are committed to improving service to every customer. Please help us in this effort by completing the survey as soon as possible. If you wish to verify the IRS's sponsorship of the survey, please contact Patty Wagner, Tax Forms & Publications, at 240-613-5680 or [patty.wagner@irs.gov](mailto:patty.wagner@irs.gov).

Sincerely,

Karen Becton-Johnson  
Director  
Media and Publications

## Fors Marsh Group LLC

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

[DATE]

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

Dear [INSERT NAME]:

A few days ago, you received a letter from Karen Becton-Johnson, Director, Media and Publications for the IRS, asking for your assistance in improving the IRS resources available to businesses. The IRS is committed to improving its performance and service to the American public and its partners. As part of this improvement effort, the IRS is conducting a survey of businesses that prepare and file business returns.

You were chosen at random to participate in this survey, which is administered by Fors Marsh Group, an independent research company. You may complete the survey either by mail or online. If you are completing the survey by mail, please use the postage-paid reply envelope to return your completed survey by [insert date].

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

[www.pubs2013business.com](http://www.pubs2013business.com)

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

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

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

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

If you wish to verify the IRS's sponsorship of the survey, please contact Patty Wagner, Tax Forms & Publications, at 240-613-5680 or [patty.wagner@irs.gov](mailto:patty.wagner@irs.gov).

Thank you in advance for your cooperation.

Sincerely,

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



**M&P 2014 Business Taxpayers Survey  
Reminder Postcard**

Do We Have Your Input Yet?

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

If you have already completed and returned the survey, please accept our sincere thanks. If not, please take a few minutes to complete and return the survey today. Your input is very important, and we want to be sure that we include your feedback.

If you did not receive the survey, or it has been misplaced, please call us toll-free at 1-800-521-7177. When contacting us, you may also request your unique password so that you can complete the survey that is available online at [www.pubs2013business.com](http://www.pubs2013business.com).

Thank you.

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

**M&P 2014 Business Taxpayers Survey  
Reminder Letter**

**Fors Marsh Group LLC**

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

[DATE]

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

Dear [INSERT NAME]:

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

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

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

[www.pubs2013business.com](http://www.pubs2013business.com)

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

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

The password will protect any data you have entered if you experience any computer disruptions. Fors Marsh Group will not share these passwords with the IRS at any time during or after this study. Fors Marsh Group will not provide any identifying information to the IRS along with your responses and will hold your identity private to the extent permitted by law. Your responses will be reported to the IRS only in aggregate with the responses from other businesses.

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

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Thank you in advance for your cooperation.

Sincerely,

Brian K. Griepentrog, Ph.D.  
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