

Taxpayer Experience Pre-Test

ATTACHMENTS

TES Recruiting Guide

Hi, this is _____ calling from Pacific Consulting Group.

I'm calling to follow up on a survey you completed for us through eRewards a few days ago where you said you would be willing to participate in a phone interview. I am calling to set up an interview time with you.

The purpose of this interview is to test modifications to a survey similar to the one you recently completed. We expect this interview will last up to 60 minutes, and you will need access to a computer with internet access throughout the call. You will receive \$40 for your time.

For Monday to Wednesday, Sept 30-Oct 3, what times work for you?

I have the following dates/times available for the interview:

	Date/Time	Participant Name	Phone	Email	Mailing address
	Mon 9/30 10:00 PT, 1:00 ET				
	Mon 9/30 11:00 PT, 2:00 ET				
	Mon 9/30 12:00 PT, 3:00 ET				
	Mon 9/30 1:00 PT, 4:00 ET				
	Mon 9/30 2:00 PT, 5:00 ET				
	Tues 10/1 10:00 PT				
	Tues 10/1 11:00 PT, 1:00 pm Central				
	Tues 10/1 12:00 PT				
	Tues 10/1 1:00 PT				
	Tues 10/1 2:30 PT, 5:30 ET				
	Weds 10/2 8:00 PT, 11:00 ET				
	Weds 10/2 9:30 PT, 12:30 ET				
	Weds 10/2 11:30 PT, 2:30 ET				
	Weds 10/2 12:30 PT, 3:30 ET				
	Weds 10/2 1:30 PT, 4:30 ET				
	Thurs 10/3 7:30 PT 10:30 Eastern				

Remember, you will need to be in front of your computer and have access to your email and phone during our call.

I will send you a confirmation email shortly. Then about an hour before our scheduled call I will send you instructions for accessing the survey online.

Can I get your mailing address so we may mail you a check for your participation at the end of the call?

[GET MAILING ADDRESS]

Thank you. We look forward to speaking with you on [DATE].

.....
[SEND CONFIRMATION EMAIL BELOW]:

Hi [NAME],

Thank you for speaking with me a few moments ago and agreeing to participate in this research project.

You are currently scheduled to participate in the interview [DATE]. As we discussed, prior to this time, I will email you a survey link and a teleconference number. During the interview, you will be reviewing a survey online and talking your way through it.

If your plans change and you are unable to participate at this time, please feel free to contact me to reschedule.

Thanks,
[NAME]

.....
Instruction email ... To be sent 30-60 minutes prior to interview.

From: Honiball, Jonathan
Sent: Tuesday, September 10, 2013 11:42 AM
To: patwilson@mgmresorts.com
Subject: PCG - interview number and link

Hi [Respondent],

Below is the information for our interview at 12pm PT, today.

Step 1: Please call into the following number and enter the attendee access code

Call-in toll-free number (US/Canada): 1-877-668-4493

Attendee access code: 230 459 34

Please dial into the number, prior to clicking on the survey link.

Step 2: Click on the survey link below

https://survey.pcgfirm.com/sawtooth/TaxpayerExperienceEnglis/cgi-bin/ciwweb.pl?studyname=TaxpayerExperienceENGLIS&password=187167&RNid=EPO3YPB8T7F989W3X4&sys_skipto=Q16<https://survey.pcgfirm.com/sawtooth/TaxpayerExperienceEnglis/cgi-bin/ciwweb.pl?studyname=TaxpayerExperienceENGLIS&password=%20187167&RNid=EPO3YPB8T7F989W3X4&sys_skipto=Q16>

If you have any issues with either the call in number or the link, you can reach me at...

W&I Taxpayer Experience Survey 2014

CONSENT [DISPLAY]

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

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

This survey is conducted for the IRS by an independent national research organization, Pacific Consulting Group. Your answers are anonymous and no personal identifying information will be released to the IRS. If you have any questions about this survey, please contact Pacific Consulting Group at [1-866-960-7897](tel:1-866-960-7897).

The OMB Control Number for this study is 1545-1432. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please contact the Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224.

Thank you in advance for your participation!

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

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

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

- 1 English
- 2 Spanish

[SC, PROMPT, TERMINATE IF SKIPPED]

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

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

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

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

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

[IF S1C IN 1-5, TERMINATE]

[SC, PROMPT, TERMINATE IF SKIPPED]

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

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

[SC, PROMPT, TERMINATE IF SKIPPED]

S3. Who **prepared** your taxes?

- 1 I (myself, with or without software)
- 2 A friend or family member (relative)
- 3 The IRS
- 4 A volunteer preparer from a community organization (*do not count* tax software company promotional events)
- 5 An independent accountant/CPA
- 6 H&R Block
- 7 Jackson Hewitt
- 8 Other paid professional **[IF XSPANISH = 2, SHOW ‘Notario’]**
- 9 Someone else
- 10 Don’t Know **[TERMINATE]**

[SC, PROMPT, TERMINATE IF SKIPPED]

S4. Which of the following was the **filing status** you used on your 2012 tax return?

- 1 Single
- 2 Married, filing jointly
- 3 Married, filing separately
- 4 Head of Household (single with dependent parent or child)
- 5 Qualifying widow(er) with dependent child
- 6 Don’t Know **[TERMINATE]**

[SC, GRID]

S6a. Which of the following forms 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 Forms related to partnerships or S Corp **[TERMINATE IF SELECTED]**

I. AWARENESS AND IRS INTERACTIONS IN PAST 12 MONTHS

AWARENESS

[SC, GRID]

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

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

1—Yes 2—No

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

[SC, GRID]

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

1—Yes 2—No

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

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

1—Yes 2—No

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

[SC, GRID, IF Q1A_3=YES, AWARE OF IRS.GOV]

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

1—Yes 2—No

[PROGRAMMER: Rotate list...]

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

- 1 7 Tax Exempt Charity Search
- 8 Tax Trails (another system which helps you answer a question like “Do I qualify for a filing extension” by asking you a series of questions that guide you to a response tailored to your situation)
- 8 Where's My Refund
- 9 Where's My Amended Return
- 10 Transcripts or prior year tax return info

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

Q5c Which of the following services/tools on the IRS website did you use?

1—Yes 2—No

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

[SC, GRID, IF XSPANISH = 2]

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

1—Yes 2—No

- 1 Calling an IRS Toll-Free line and getting assistance in Spanish?
- 2 Visiting a local IRS office (Taxpayer Assistance Center, walk-in center) and getting assistance in Spanish?
- 3 Visiting the Español section of the IRS website?
- 4 Sending regular mail to the IRS in Spanish?
- 5 Spanish speaking volunteer preparers from a community organization?
6. Where's My Refund?
7. Using IRS2Go App (for smartphone or tablet mobile device)

[SC, IF XSPANISH = 2]

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

1—Yes 2—No

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

[SC, IF XSPANISH = 2]

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

- 1 Yes
- 2 No

INTRO1 [IF A “YES” RESPONSE TO Q1A_A THRU Q1A_E OR YES TO Q1B_A THRU Q1B_D, DISPLAY]

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

[IF A “YES” RESPONSE TO Q1A_A THRU Q1A_E OR YES TO Q1B_A THRU Q1B_D, SC, GRID]

Q2. In the *past 12 months*, did you contact the IRS for any reason, using any of the following methods:

Select one answer from each row in the grid

1—Yes 2—No

- 2a [ASK IF Q1A_A=YES OR Q1B_A=YES] Call an IRS Toll-Free line
- 2b [ASK IF Q1A_B=YES OR Q1B_B=YES] Visit a local IRS office (Taxpayer Assistance Center, walk-in center)
- 2c [ASK IF Q1A_C=YES OR Q1B_C=YES] Actively visit the IRS website to obtain information. Please do not count casual browsing.
- 2d [ASK IF Q1A_D=YES OR Q1B_D=YES] Contact the IRS through regular mail
- 2e [ASK IF Q1A_E=YES] Email the IRS
- 2f [ASK IF Q1A_F=YES OR Q1B_E=YES] Get help from a volunteer tax preparer from a community organization
- 2g [ASK IF Q1A_F=YES] Use IRS2Go App (for smartphone or tablet mobile device)

Q16o. [if any of Q2a to Q2g=YES]

For what reasons have you contacted the IRS in the past 12 months?

Open End _____

[PROGRAMMING: SKIP TO SECTION III IF ANY Q2a thru Q2g is not yes]

ALL QUESTIONS IN THE LOOP are required. (Q16 to Q16F)

[SC]

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

- 1 Get a **form or publication**
- 2 Obtain transcripts or **prior year tax return information**
- 3 Get help with **tax law** while **preparing** my return such as information on withholding, dependents, deductions, or tax credits
- 4 Get **tax return preparation help** such as which forms to file, record keeping, filling out forms, how to file or how to get more help
- 5 Get help making tax-related calculations
- 6 Get **information** or assistance about an **IRS notice** — notices are mailed letters about issues such as balance dues, overpayments, underpayments, information about tax credits or requests for more information
- 7 Get **tax law** information **after filing** my tax return to help me clarify the tax process or remain/become compliant such as information about estimated taxes (*do not* count contacts about IRS notices)
- 8 Get information or assistance related to identity theft
- 9 File a tax return or form
- 10 **Make a payment**

- 11 Get **information** about making **payments**
- 12 Get **information** about a **refund**
- 13 Obtain **Individual** or **Employer Tax ID** (ITIN, EIN)
- 14 Other, specify [if "Other" selected and nothing entered in blank, prompt once]

[BEGIN REASONS LOOP - A MAXIMUM OF THREE (3) REASONS WILL PROCEED THROUGH THE CHANNEL EXPERIENCE LOOP]

If a respondent selects more than 3 reasons:

Initial Preference is given to: 16_8 Identity Theft

After this initial selection, then the REASON with the fewest respondents should be selected, until there are three total reasons.

[ASK IF Q16_8 LOOP (Identity Theft) = YES]

Q50a. What service did you expect the IRS to provide to you regarding identity theft?

[Open-ended]

[ASK IF Q16_8 LOOP (Identity Theft) = YES]

Q50b. Did the IRS issue you an Identity Protection Personal Identification Number (IP PIN)?

- 1 Yes
- 2 No

[ASK IF Q50b = YES]

Q50c. Did you use the Identity Protection Personal Identification Number when filing your return this past filing season?

- 1 Yes
- 2 No

[ASK IF Q16_2 LOOP (Transcript) = YES]

Q51a. Did you need a transcript from the IRS because another party required it?

- 1 Yes
- 2 No

[ASK IF Q51a = YES]

Q51b. What type of business asked for a copy?

- 1 Mortgage
- 2 Education/FAFSA
- 3 Other (please specify)

[ASK IF Q51a = NO]

Q51c. What did you need the transcript for?

[Open End]

[ASK IF Q16_6 LOOP (IRS Notice) = YES]

[SC]

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

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

[SC, IF Q57=1]

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

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

[SC, IF Q57=2]

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

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

[SC, IF Q57=2]

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

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

[SC, IF Q57=3]

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

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

[SC, If Q57b.1=1]

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

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

[LOOP COMMAND Q16a and Q16b - 1=first, 2= second, 3=third, etc.]

Q16a. What was the **first** information source you used in order to [INSERT Q16]?

- 1 IRS forms and instruction booklets [IF SELECTED,SKIP TO Q16b]
- 2 IRS Website (www.irs.gov) [IF SELECTED,SKIP TO Q5 SET, THEN SKIP TO Q16b]
- 3 IRS2GO App [IF SELECTED,SKIP TO Q14b, THEN SKIP TO Q16b]
- 4 IRS Social Media (e.g., Facebook, YouTube, Twitter, Tumblr) [IF SELECTED,SKIP TO Q16b]
- 5 IRS Tax Assistance Center (walk-in sites) [IF SELECTED,SKIP TO Q4 SET, THEN SKIP TO Q16b]
- 6 Automated IRS phone system [IF SELECTED,SKIP TO Q16b]
- 7 IRS phone representative [IF SELECTED,SKIP TO Q3 SET, THEN SKIP TO Q16b]
- 8 Email with the IRS [IF SELECTED, SKIP TO Q16b]
- 9 Written correspondence through mail with the IRS [IF SELECTED,SKIP TO Q6 SET, THEN SKIP TO Q16b]

- 10 A friend or family member [IF SELECTED,SKIP TO Q16b]
- 11 Volunteer tax preparation site [IF SELECTED,SKIP TO Q16b]
- 12 Tax preparation company [IF SELECTED,SKIP TO Q16b]
- 13 A tax professional [IF SELECTED,SKIP TO Q16b]
- 14 Accountant/bookkeeper [IF SELECTED,SKIP TO Q16b]
- 15 Non-IRS book or publication [IF SELECTED,SKIP TO Q16b]
- 16 Non-IRS Website [IF SELECTED,SKIP TO Q16b]
- 17 Non-IRS Social Media [IF SELECTED,SKIP TO Q16b]
- 18 Tax software [IF SELECTED,SKIP TO Q16b]
- 19 Other (please specify) [IF SELECTED,SKIP TO Q16b]

CHANNEL EXPERIENCE

Toll –Free Section

[SC, IF XSPANISH = 2]

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

- 1 Yes (Continue)
- 2 No

[IF Q2A = YES , SC]

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

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

- 1 Yes
- 2 No

[IF Q3E = 1, MC]

Q3g. What were your reasons for hanging up?

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

[IF Q2A = YES, SC]

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

- 1 Yes
- 2 No
- 3 Don't know/Not sure

[IF Q3e=2, SC]

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

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

[SC, IF Q2A = YES]

Q3k1a. Were all of your questions answered?

- 1 Yes
- 2 No

[SC]

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

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

[SC]

Q4d1a. Were all of your questions answered during your visit?

- 1 Yes
- 2 No

[SC, IF XSPANISH = 2]

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

- 1 Yes
- 2 No

[SC, IF Q4S1 = 1]

Q4s2 Did you receive assistance in Spanish?

- 1 Yes
- 2 No

[SC, IF XSPANISH = 2]

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

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

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

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

- 1 Español
- 2 English
- 3 About the same

[SC, IF XSPANISH=2 AND IF Q5a_9 = 1, ASK ONLY ONCE]

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

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

[MC, IF XSPANISH=2 AND Q5S1 = 2, ASK ONLY ONCE]

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

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

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

- 1 Yes
- 2 No
- 3 Partially

[SC, IF Q5E=1 or 3]

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

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

[TEXT BOX, IF Q5E=NO or Partially]

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

[SC]

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

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

[SC]

Q6c1a. Were all of your questions answered through mailing to IRS?

- 1 Yes
- 2 No
- 3 In process

[Only ask this question once per reason-during first contact]

Q16b. What was the reason that [Q16a] was your **first** choice in your effort to [Q16]?

Open End

Q16c. Did the [Q16a] resolve the effort to [Q16] or did you need to go to another source?

- 1 Completely resolved – needed no further effort [CONTINUE to Q16d]
- 2 Needed to go to another source [LOOP TO Q16a]

If after fifth choice and Q16c=Need to go to another source, ask Q16c_N and then go to the next REASON (if already on the 3rd REASON, skip to Q14a.)

Q16c_N. How did you resolve your effort to [Q16]?

[SC]

Q16d. For [Q16], how much time did it take for you to locate the information to resolve your issue?

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

[SC]

Q16e. What is a reasonable amount of time to resolve your issue?

- 1 Within 1 hour
- 2 Within 2-4 hours
- 3 Within 5-8 hours
- 4 Within 24 hours
- 5 Within 7 days

- 6 8-15 days
- 7 16-29 days
- 8 30-44 days
- 9 45-60 days
- 10 Over 60 days

[SC]

Q16f. Please rate your satisfaction with the following aspects of getting your information. [if Q16=1, change question text from “your information” to “the form or publication”]

How satisfied were you with:

- 1 Very dissatisfied
 - 2 Dissatisfied
 - 3 Neither satisfied nor dissatisfied (neutral)
 - 4 Satisfied
 - 5 Very satisfied
 - 6 Not applicable
- a The time it took to resolve your issue
 - b The number of steps needed to obtain information you sought
 - c The accuracy of the information you received

[LOOP COMMAND - RETURN TO Q16 FOR ADDITIONAL REASONS - ONCE REASONS ARE COMPLETED, PROCEED TO Q14A]

***LOOP ENDS HERE

[MC, ASKED OF ALL RESPONDENTS]

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

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

- a. Get an IRS form or publication
- b. Get information about completing a tax form
- c. Find an answer to a tax law question
- d. Determine my eligibility for a tax benefit or whether certain requirements apply to me
- e. Get help making tax-related calculations
- f. Get help preparing a tax return or form
- g. File a tax return or form
- h. Set up a payment plan
- i. Make a payment
- j. Get information about a refund
- k. Respond to a notice or letter received from the IRS
- l. Getting a transcript or prior year tax return information
- m. Something else (specify)_____

[SC][ASK ONLY ONCE]

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

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

1. Get an IRS form or publication
2. Get information about completing a tax form
3. Getting a transcript or prior year tax return information
4. Find an answer to a tax law question
5. Determine my eligibility for a tax benefit or whether certain requirements apply to me
6. Get help making tax-related calculations
7. Get help preparing a tax return or form
8. File a tax return or form
9. Set up a payment plan
10. Make a payment
11. Get information about a refund
12. Respond to a notice or letter received from the IRS
13. Something else (specify)_____

[SC]

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

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

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

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

- 1 It was easier to go to a local IRS office
- 2 I don't have Internet access
- 3 I used local IRS offices before
- 4 I don't believe I can get my questions answered by using the IRS website
- 5 I did try to use the IRS website
- 6 I wasn't aware of the IRS website

- 7 The letter I received from the IRS said to go to a local office
- 8 Something else (specify)

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

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

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

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

- 1 IRS required information be mailed to the agency
- 2 Am not aware that I could contact the IRS any other way

- 3 Never thought about contacting the IRS any other way
- 4 I don't have Internet access
- 5 Believe I can't get information needed from IRS website
- 6 Believe I can't get information needed from the IRS Toll-Free line
- 7 Believe I can't get information from other IRS sources
- 8 Want paper trail
- 9 Other (specify)_____

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

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

- 1 Yes
- 2 No

[TXT, IF Q9 = 1]

Q9A What other reasons?_____

III. PREPARING AND COMPLETING YOUR RETURN AND FILING

[MC]

Tax Prep

[USE LIST FROM Q23B BELOW]

[MC]

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

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

Q23b1. If the following electronic options were available, what is the likelihood that you would choose the electronic option over receiving paper notices where 1 is "Not at all Likely" and 5 is "Very Likely"?

1. Choose to receive emails from the IRS containing general information, no personal or financial information.
2. Choose to receive emails from the IRS containing personal and/or financial information.

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

[SC]

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

- 1 Yes
- 2 No

[SC, IF Q28A=1]

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

- 1 Accountant/Tax preparer (H&R Block, Jackson Hewitt)
- 2 TV/Radio/newspaper/flyers
- 3 Friend/Family/Co-worker
- 4 IRS.gov or IRS publication
- 5 Tax software (e.g. TurboTax, TaxCut, TaxAct)
- 6 Social media (e.g. Facebook, Twitter, YouTube, etc.)
- 7 IRS2Go App (for smartphones or mobile tablet devices)
- 8 Other (specify) _____

[SC, If Q28A=1]

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

- 1 Yes
- 2 No [skip to Q26]

[SC, If Q28=1]

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

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

[SC]

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

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

[SC, IF S3 = 1]

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

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

Tax Filing

[SC]

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

- 1 Yes
- 2 No

[SC, SKIP IF Q26=3]

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

- 1 Yes
- 2 No

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

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

- 1 Yes
- 2 No

[SC]

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

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

[SC, IF Q30A NOT =4 OR MISSING]

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

- 1 Yes
- 2 No

[MC if ((Q35=YES OR Q35S1=YES (AWARE OF FREE FILE)) AND (Q26 = 1,2 or or 6 (DID NOT USE TRADITIONAL FREE FILE but used menthods in 1, 2 or 6))]

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

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

[SC, GRID – MAKE ALL COLUMNS SAME WIDTH]

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

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

[IF S3 = 1 SHOW]

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

[SC, IF S3 NE 1]

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

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

[SC, IF S3 NE 1]

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

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

[SC, IF S3 = 1]

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

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

IV. GETTING YOUR REFUND FROM THE IRS

[SC]

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

Yes [GO TO Q42C]

No [GO TO Q43]

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

[SC]

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

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

[SC]

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

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

[SC, IF Q43B = 1]

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

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

[SC, IF 46 = 1, 2]

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

- 1 Direct deposit
- 2 Paper check
- 3 Refund Anticipation Loan (RAL).

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

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

- 7 Very dissatisfied
- 8 Dissatisfied
- 9 Neither satisfied nor dissatisfied (neutral)
- 10 Satisfied
- 11 Very satisfied
- 12 Not applicable

- d The time it took to receive your refund from the IRS
- e The accuracy of your refund
- f The IRS's explanation of any adjustments to your refund

[SC, IF Q43B = 1]

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

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

VI. OVERALL SATISFACTION: ALL RESPONDENTS

Overall Satisfaction

[PROMPT, SC, IF XSPANISH = 2]

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

Very dissatisfied

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

[PROMPT, SC]

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

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

[TXT]

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

VII. PSYCHOGRAPHIC QUESTIONS

[SC, GRID]

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

- 1 Strongly disagree
 - 2 Disagree
 - 3 Neither agree nor disagree
 - 4 Agree
 - 5 Strongly agree
- a. I enjoy doing research on the Internet

- b. Technology is important to me
- c. I perform financial activities (i.e., pay bills, credit cards, insurance, mortgages, etc) on the Internet
- d. I make purchases on the Internet
- e. I feel secure sharing personal financial information over the Internet
- f. I think preparing tax returns should be made easier
- g. I am knowledgeable about U.S. Tax Code
- h. I pay attention to changes proposed or made to U.S. Tax Code which may or may not impact my personal tax situation
- i. I proactively plan for and minimize my tax burden throughout the year by tracking deductible expenses, making purchases to qualify for tax credits, selling investments to offset capital gains, making charitable donations, etc.
- j. I think electronic filing should be free to everyone
- k. I think there should be an alternative tax system to replace the income tax system
- l. I regularly save money
- m. I have an emergency fund/financial safety net
- n. I'm confident in my ability to solve financial problems that come up in my everyday life

VIII. DEMOGRAPHICS: ALL RESPONDENTS

Here are a few questions for classification purposes only.

[SC]

D1. Do you have a computer at home?

- 1 Yes
- 2 No

[SC]

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

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

[MC]

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

- 1 Facebook
- 2 Twitter
- 3 YouTube
- 4 LinkedIn
- 5 Tumblr
- 6 Other (specify) _____
- 7 None

[SC]

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

- 1 Yes
- 2 No

[SC]

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

- 1 Less than 9th grade
- 2 9th grade to 12th grade, no diploma

- 3 High school graduate/GED
- 4 Some technical/vocational school
- 5 Technical or vocational school graduate
- 6 Some college, no degree
- 7 Associate Degree
- 8 Bachelor's Degree
- 9 Master's Degree
- 10 Post-Master's Degree

[MC]

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

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

[SC, IF D6 = 1-7]

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

- 1 Yes
- 2 No

[SC]

D7. What is your employment status?

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

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

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

_____ months

[SC]

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

- 1 Yes
- 2 No

[SC]

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

- 1 Less than \$10,000
- 2 \$10,000 to less than \$15,000

- 3 \$15,000 to less than \$20,000
- 4 \$20,000 to less than \$25,000
- 5 \$25,000 to less than \$35,000
- 6 \$35,000 to less than \$50,000
- 7 \$50,000 to less than \$75,000
- 8 \$75,000 to less than \$100,000
- 9 \$100,000 to less than \$150,000
- 10 \$150,000 to less than \$200,000
- 11 \$200,000 to less than \$1 million
- 12 \$1 million or more

[SC]

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

- 1 Yes
- 2 No

[SC, IF XSPANISH = 2]

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

- 1 Yes
- 2 No

[SC, IF XSPANISH = 2]

D11B. What is your country of origin?

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