

FIRST INVITATION LETTER

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

Dear [NAME],

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

[Click here to get started](#)

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

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

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

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

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

Thank you for your participation.

Best Regards,
CONTRACTOR Interactive Services

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

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

CONTRACTOR. All Rights Reserved.

This email was sent to: [EMAIL]

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

REMINDER 1 LETTER

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Dear [NAME]

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

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REMINDER 3 LETTER

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

IRS Taxpayer Service Survey
September 2015
- Study Details -

[PROG: CREATE CUSTOM MESSAGE WHERE INSTRUCTIONS INDICATE: [PROMPT IF SKIP]: IF RESPONDENT ATTEMPTS TO SKIP QUESTION DISPLAY: “ YOUR RESPONSE IS VERY IMPORTANT TO THE SUCCESS OF THIS SURVEY, PLEASE ANSWER AS BEST AS YOU CAN”, IF RESPONDENT SKIPS AGAIN, ALLOW RESPONDENT TO SKIP]

[PROG:
CREATE QUOTA_A=COMPLETE STATUS
CREATE QUOTA_B=TAC USER, SEE INSTURCTIONS AT Q3]

[PRG: DISPLAY SECTION HEADING WITH FIRST QUESTION OF EACH SECTION; POP-IN DATA WHERE NOTED]

[PRG: DO NOT DISPLAY ATTRIBUTE OR SELECTIONS NUMBERS OR LETTERS UNLESS NOTED]

[PROG: DISPLAY INTRO1 FOR ALL GROUPS]

Intro1

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

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

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

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

Myself [PRG: Continue]

Myself and another adult equally [PRG: Continue]

Someone else in household [PRG: Terminate]

Didn't file taxes last year [PRG: Terminate]

[PROMPT IF SKIP]

2. Are you currently employed by the IRS?

Yes [PRG:Terminate]

No [PRG:Continue]

[PRG: If NO: (Terminate) DISPLAY:

Thank you for your time. Unfortunately, you are not eligible for this survey.

IF YES: “YES” go to Q3]

[PROMPT IF SKIP]

The IRS runs local IRS offices in many cities throughout the country. Locations vary with most people living about 30 minutes from an IRS office. At these offices, you can walk in and get a number of services related to paying your taxes. You can get forms, get questions answered, make a payment, or set up a payment plan. IRS service representatives are available to help you in person, if necessary.

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

Yes

No

[PRG Q3 count “Yes” towards QUOTA_B]

[PROMPT IF SKIP]

[PRG Q4: DISPLAY AS GRID, YES/NO ACROSS TOP ATTRIBUTES ON LEFT SIDE, DO NOT DISPLAY ATTRIBUTE NUMBERS]

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

YES

NO

- 1) Amend your tax return. For example, updating your return because you found an error after filing your return or get another W-2 in the mail that was not included in your original filing.
- 2) Get answers to tax questions. For example, find out how health care laws could affect your tax return.

- 3) Obtain a copy of a previous tax return. For example, get a copy of last year's tax return from the IRS.
- 4) Schedule an appointment. For example, schedule an appointment to talk with an IRS agent or meet with an IRS employee at an IRS office

SERVICE1=1-6: RANDOMLY SELECT FROM ITEMS MARKED "YES" IN Q4.

SERVICE2=1-6: RANDOMLY SELECT FROM ITEMS MARKED "NO" OR "SKIP" Q4.

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

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

DEMOGRAPHIC QUESTIONS

5. Who did most of work preparing your most recent tax return? Was it:

Please select only one.

You (yourself) **[PRG: go to Q6a]**

A paid preparer (such as H&R Block, Jackson Hewitt, accountant or CPA) **[PRG: go to Q6b]**

An unpaid preparer (friend, relative, colleague, or a volunteer preparer from a community organization) **[PRG: go to Q6c]**

**[PRG Q6A: IF YOU/YOURSELF IN Q5]
[PROMPT IF SKIP]**

6a. For this most recent tax return, did you mainly use computer software to prepare your taxes, or did you prepare them by hand?

Used software (such as TurboTax)

Used the IRS Free File program on irs.gov

Prepared by hand

**[PRG Q6B IF YES TO PAID PREPARER IN Q5]
[PROMPT IF SKIP]**

6b. For this most recent tax return, did you use a tax preparation firm like H&R Block or Jackson Hewitt, or did you use an independent practitioner like an accountant or CPA?

Tax preparation firm (such as H&R Block or Jackson Hewitt)

Independent preparer (accountant or CPA)

[PRG: Q6A IF YES TO UNPAID PREPARER IN Q5]

[PROMPT IF SKIP]

6c. For this most recent tax return, who prepared your taxes free of charge?

A volunteer preparer from a community organization or Tax Counseling for the Elderly site

Local IRS office

Friend or relative

[PROMPT IF SKIP]

[PRG Q6D: DO NOT SHOW IF Q6A=USED THE IRS FREE FILE PROGRAM ON IRS.GOV]

6d. For this most recent tax return, was your return sent to the IRS by paper via regular mail or electronically?

Regular mail

Electronically

Other method (e.g. dropped off in person, etc.)

[PRG: CREATE DATA ONLY VARIABLE BASED ON Q5 AND Q6:

CREATE VARIABLE "CURRENT" WITH VALID VALUES 1 TO 21

1=myself using software and was mailed by regular mail **[PRG: Q5A= "YOU" AND (Q6A="SOFTWARE" AND Q6D="REGULAR MAIL")]**

2=myself using software and was e-filed **[PRG: Q5A= "YOU" AND (Q6A= "SOFTWARE" AND Q6D="ELECTRONICALLY")]**

3=myself using software and other method **[PRG: Q5A= "YOU" AND (AND Q6A="SOFTWARE" AND Q6D="OTHER METHOD")]**

4=myself by hand and was mailed by regular mail **[PRG: Q5A= "YOU" AND (Q6A="PREPARED BY HAND" AND Q6D="REGULAR MAIL")]**

5=myself by hand and other method **[PRG: Q5A= "YOU" AND (Q6A="PREPARED BY HAND" AND Q6D="OTHER METHOD")]**

6=myself using Free File and was e-filed **[PRG: Q5A= "YOU" AND (Q6A="IRS FREE FILE PROGRAM" AND Q6A="ELECTRONICALLY")]**

7=a tax preparation firm and was mailed by regular mail **[PRG: Q6B= "TAX PREPARATION FIRM" AND Q6D="REGULAR MAIL"]**

8=a tax preparation firm and was e-filed **[PRG: Q6B= "TAX PREPARATION FIRM" AND Q6D="ELECTRONICALLY"]**

9=a tax preparation firm and other method [PRG: Q6B= "TAX PREPARATION FIRM" AND Q6D="OTHER METHOD"]

10=an independent preparer and was mailed by regular mail [PRG: Q6B= "INDEPENDENT PREPARER" AND Q6D="REGULAR MAIL"]

11= an independent preparer and was e-filed mail [PRG: Q6B= "AN INDEPENDENT PREPARER" AND Q6D="ELECTRONICALLY"]

12=an independent preparer and other method mail [PRG: Q6B= "AN INDEPENDENT PREPARER" AND Q6D="OTHER METHOD"]

13=a community organization/free site and was mailed by regular mail [PRG: Q6C= "A COMMUNITY ORGANIZATION" AND Q6D="REGULAR MAIL"]

14= a community organization/free site and was e-filed mail [PRG: Q6C= "A COMMUNITY ORGANIZATION" AND Q6D="ELECTRONICALLY"]

15=a community organization/free site and other method mail [PRG: Q6C= "A COMMUNITY ORGANIZATION" AND Q6D="OTHER METHOD"]

16=a local IRS Office and was mailed by regular mail [PRG: Q6C= "A LOCAL IRS OFFICE" AND Q6D="REGULAR MAIL"]

17= a local IRS Office and was e-filed [PRG: Q6C= "A LOCAL IRS OFFICE" AND Q6D="ELECTRONICALLY"]

18= a local IRS Office and other method [PRG: Q6C= "A LOCAL IRS OFFICE" AND Q6D="OTHER METHOD"]

19=a friend or relative and was mailed by regular mail [PRG: Q5A= "AN UNPAID PREPARER" AND Q6D="REGULAR MAIL"]

20=a friend or relative and was e-filed [PRG: Q5A= "AN UNPAID PREPARER" AND Q6D="ELECTRONICALLY"]

21=a friend or relative and other method [PRG: Q5A= "AN UNPAID PREPARER" AND Q6D="OTHER METHOD"]

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

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

\$100,000 to \$199,999

\$200,000 or more

8. Which category best describes your current age?

18-24

25-35

36-45

46-55

56-65

66-75

76 or older

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

Very well

Well

Not well **[PRG:Terminate]**

Not at all **[PRG: Terminate]**

[PROMPT IF SKIP]

Most Recent Federal Tax Filing Situation

10. Which of the following forms were used to file your 2014 tax return (tax return filed in 2015 for income earned in year 2014)?

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

- 1 Form 1040EZ - did not itemize deductions **[PRG: skip to Q11]**
- 2 Form 1040A - did not itemize deductions **[PRG: skip to Q11]**
- 3 Form 1040A WITH other forms or schedules
- 4 Form 1040 (long form) WITHOUT other forms or schedules - did not itemize deductions **[PRG: skip to Q11]**
- 5 Form 1040 (long form) WITH other forms or schedules
- 6 Form 1040 (long form) - don't remember if had other forms/schedules
- 7 Form 1040EZ or Form 1040A – don't remember which one **[PRG: skip to Q11]**
- 8 Don't know**[PRG: skip to Q11]**

[PROG Q10A: DISPLAY IN GRID, YES/KNOW/DK ACROSS TOP, ATTRIBUTES 1-10 ON LEFT, DO NOT INCLUDE THE ATTRIBUTE NUMBER ON SCREEN]

[PRG Q10A: IF Q10 IS 3, 4 OR 5]

[

10a. Which of the following form and schedules were filed with your 2014 return? Did you file a:

Yes

No

Don't know

- 1 Schedule A for itemized deductions including home mortgage deductions, charitable contributions, and other types of deductions
- 2 Schedule B for interest and dividend income
- 3 Schedule C for small business income

- 4 Schedule D for capital gains or losses
- 5 Schedule E for supplemental income, such as rental income, royalties, and trusts

- 6 Schedule F for farm income
- 7 Form 2106 employee business expenses
- 8 Schedule EIC for earned income credit
- 9 Forms related to other credits, such as education credit
- 10 Forms related to partnerships or S Corp

DESCRIPTION OF TAX ASSISTANCE METHODS

We are going to ask you to think about when you might get information or help from the IRS and how the IRS offers to help taxpayers. We are going to describe each of the main methods for getting help and later we will ask you to tell us when you might use them. Please note that these methods are either currently available or may be available to you in the future.

IRS TOLL-FREE PHONE LINE

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

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

Yes
No

[PRG Q11A IF Q11=YES]

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

Talk to a live phone assistor

Use the automated menu responses with no live assistor

IRS WEBSITE

Next, let's talk about the IRS website that can be reached at **www.irs.gov** **[PROG: DO NOT INCLUDE HYPERLINK]**. You must have Internet access to use the IRS website. Once at the website, you can browse through different pages to find information about filing taxes or use interactive tools. Interactive tools are electronic tools that help you perform tasks on irs.gov, such as calculating withholding amounts, determining your filing status, or finding out the status of your refund.

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

Yes
No

[PROG Q12A: IF Q12=YES]

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

Browse through different pages to find and read information

Use an interactive tool to get the answer to a tax law question or complete a task

SMARTPHONE

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

Individuals can download applications for smartphones that allow them to complete tasks or get information. An example of a current smartphone application offered by the IRS is IRS2Go. IRS2Go lets taxpayers check on the status of their tax refund and obtain other helpful tax information.

13. Do you currently own a smartphone?

Yes

No, but I am considering buying one

No, and I am not considering buying one

[PRG Q13A: IF Q13=YES]

13a. Have you used the IRS smartphone application named IRS2Go?

Yes

No

REGULAR MAIL

The IRS also provides service through regular mail. Taxpayers can use the regular mail to ask tax questions and send payments. Once the IRS receives mail from a taxpayer, it typically takes between 30 and 90 days for the taxpayer to receive a response.

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

Yes

No

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

Yes

No

FAX

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

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

Yes

No

[GRID]

[SHOW HEADER AT TOP MIDDLE AND BOTTOM OF SCREEN]

[PROMPT IF SKIP]

SECURE MESSAGE

The IRS may offer e-mail communication to taxpayers through a secure portal similar to secure message systems used by some health insurance companies, credit card companies, banks, and loan institutions. In this type of communication, people can log onto the company's website and communicate with the company by sending and receiving messages. In some instances, customers may attach digital documents to the message.

For most tasks, it would take between 30 and 90 days for the taxpayer to receive a response back from the IRS.

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

Yes

No

AUTOMATIC NOTIFICATION

The IRS may offer automatic e-mail or text notifications for account status updates similar to account notifications provided by some banks and credit card companies to inform customers of low balances, payments processed, or payments due.

For the automatic e-mail notifications, taxpayers would sign up for the service and then get emails whenever a change to their account occurs, such as a payment posting to their account.

For the automatic text notifications, taxpayers would sign up for the service online and then get texts whenever a change to their account occurs, such as a payment posting to their account.

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

Yes

No

[PRG Q16C: IF Q16B=YES]

16c. Which type of account alerts did you sign up for within the last two years?

Automatic email notifications

Automatic text notifications

I signed up for both automatic email and automatic text notifications with a private company within the last two years.

LOCAL IRS OFFICE

The IRS runs local IRS offices in many cities throughout the country. Locations vary with most people living about 30 minutes from an IRS office. At these offices, you can walk in and get a number of services related to paying your taxes. You can get forms, get questions answered, make a payment, or set up a payment plan. IRS service representatives are available to help you in person, if necessary.

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

Yes

No

[PRG Q17B: IF Q17A=YES]

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

Need face-to-face assistance with a representative (1)

Serve yourself with no live assistance needed (2)

SECURE ONLINE CHAT

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

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

Yes

No

[PRG: DISPLAY FOR ALL GROUPS]

TAX ASSISTANCE ATTRIBUTE DESCRIPTIONS

Now we want to explain a few terms that will be used for the rest of this survey. Some of these will have different meanings depending on which service channel is used to receive help.

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

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

[PRG: DISPLAY FOR ALL GROUPS]

20. <in yellow highlight>Identity proofing </in yellow highlight> means how a taxpayer proves that they are who they say they are in order to use a service. For example, a taxpayer may have to provide their Social Security Number or answer questions about their credit history.

Identity proofing requirements vary. The options for identity proofing are:

- 1 - Personal Information, such as your Social Security Number, date of birth, or address listed on your tax return.
- 2 - Tax Return Information, such as the filing status listed on your tax return
- 3 - Knowledge Based Questions, such as the street you grew up on or your mortgage company
- 4 - Bank Account Information, such as your bank account number or banking institution

[PRG: DISPLAY FOR ALL GROUPS]

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

22. <in yellow highlight >Account Required</in yellow highlight > means whether the taxpayer has to create an account in order to use the service.

For online methods of help, creating an account would require taxpayers to answer additional questions in order to use the service but would provide them with a log-in username and password for future online services.

If a method of help does not require the taxpayer to create an account, the taxpayer could log in as a guest to complete the service. This method may take less time than creating an account for the first service, but would require taxpayers to answer questions to prove their identity each time they need help.

[GRID]

[SHOW HEADER AT TOP MIDDLE AND BOTTOM OF SCREEN]

[PROMPT IF SKIP]

PRACTICE QUESTION

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

[PRG: Select SERVICE1 VARIABLE CREATED IN Q4]

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

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

Imagine that you need to phone the Toll-Free line and talk with a live assistor. In one instance, the time required to get a question answered or service completed, including any time you wait to receive service is 10 minutes. In another instance, time required would take you 30 minutes to have your question answered. Please look at the two options and select the one that you prefer based only on the information provided about each option.

IRS Toll-Free Line, Live Customer Rep	IRS Toll-Free Line, Live Customer Rep
Time Required 30 minutes	Time Required 10 minutes
*	*

[PRG Q23B: IF Q23=1]

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

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

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

[PRG Q23C: IF Q23B=2]

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

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

Imagine that you need to phone the Toll-Free line and talk with a live Customer Service Representative. In one instance, the time required to get a question answered or service completed, including any time you wait to receive service is 10 minutes. In another instance, time required would take you 30 minutes to have your question answered. Please look at the two options and select the one that you prefer based only on the information provided about each option.

IRS Toll-Free Line, Live Customer Rep	IRS Toll-Free Line, Live Customer Rep
Time Required 30 minutes	Time Required 10 minutes
*	*

25-34. Please assume that your problem is: <in yellow highlight> [Service1] </in yellow>.

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

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

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

Which of the following four approaches would you MOST prefer to resolve the service need <in yellow highlight> “[Service1]” </in yellow highlight>?

[CREATE HYPERLINKS BASED ON Q19 TO Q22]

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

IF SERVICE1 = SUBMIT DOCUMENTATION, THE ATTRIBUTE “ACCOUNT UPDATE TIME” LABELED AS TABLE FOR SUBMIT DOCUMENTATION SERVICE NEED.

[PRG: CREATE HYPERLINKS FOR TAX ASSISTANCE METHODS – OPEN WINDOW AND DISPLAY DEFINITIONS FROM 19-22]

IRS Tax Assistance Method	METHOD B1	METHOD B2	METHOD B3	METHOD B4
Time Required				
Identity Proofing				
Confirmation of Receipt				NA
Account Required				
	*	*	*	*

[FOR ASSISTANCE METHODS 2-4 ABOVE RANDOMLY SELECT ONE OF THE LEVELS FROM THE CORRESPONDING TAB IN THE EXCEL SHEET]

[FOR ASSISTANCE METHOD #1, TIME REQUIRED, SELECT ONE OF THE THREE LEVELS FROM THE TIME REQUIRED TAB BASED ON THE METHOD THAT IS SHOWN]

[DISPLAY]

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

[GRID]

[SHOW HEADER AT TOP MIDDLE AND BOTTOM OF SCREEN]

[PROMPT IF SKIP]

36 – 45. Please continue to assume that your problem is: <in yellow> [Service2] </in yellow>.

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

[CREATE HYPERLINKS BASED ON Q19 TO Q22]

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

IF SERVICE2 = SUBMIT DOCUMENTATION, THE ATTRIBUTE "ACCOUNT UPDATE TIME" LABELED AS TABLE FOR SUBMIT DOCUMENTATION SERVICE NEED.

IRS Tax Assistance Method	METHOD B1	METHOD B2	METHOD B3	METHOD B4
<u>Time Required</u>				
<u>Identity Proofing</u>				
<u>Confirmation of Receipt</u>				NA
<u>Account Required</u>				
	*	*	*	*

[FOR ASSISTANCE METHODS 2-4 ABOVE RANDOMLY SELECT ONE OF THE LEVELS FROM THE CORRESPONDING TAB IN THE EXCEL SHEET]

[FOR ASSISTANCE METHOD #1, TIME REQUIRED, SELECT ONE OF THE THREE LEVELS FROM THE TIME REQUIRED TAB BASED ON THE METHOD THAT IS SHOWN]

[PRG: DISPLAY FOR ALL GROUPS]

You have reached the end of the survey. Thank you for participating in this research.
Your feedback is very valuable.

The Paperwork Reduction Act requires IRS to display an OMB Control Number (1545-1349) on all public information requests. If you have any comments regarding the time estimates associated with this study or suggestions for making this process simpler, please write to the Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, D.C 20224