

**ATTACHMENT A: Information Collection Request
WAVE 1 - Email Invitation to Participate**

As part of filing your 2016 IRS individual tax return, you participated in an IRS pilot project concerning information about the status of your refund. The IRS is asking for your help in improving the services provided to taxpayers concerning digital customer service.

Please take the opportunity to complete a brief survey, located at <survey link>.

The survey results will help to shape the future of digital services being offered by the IRS. Your participation in this survey is entirely voluntary and your answers will be kept private to the fullest extent of the law.

If you wish to verify the IRS's sponsorship of the survey, please go to irs.gov and search for 'Customer Satisfaction Surveys'.

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 #1545-1349. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to the: Internal Revenue Service, Special Services Section, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, IR-6406, Washington, DC 20224.

**ATTACHMENT B: Information Collection Request
WAVE 2 – Reminder Email**

If you have not already done so, please take the opportunity to complete a brief survey, located at <survey link>.

Your participation in this survey is entirely voluntary and your answers will be kept private to the fullest extent of the law.

If you wish to verify the IRS's sponsorship of the survey, please go to irs.gov and search for 'Customer Satisfaction Surveys'.

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**ATTACHMENT C: Information Collection Request
SURVEY INSTRUMENT**

Third Party Refund Status API Survey

Introduction

Dear Taxpayer:

The purpose of this survey is to gather information on the effectiveness of a recent pilot project to distribute taxpayer refund information through tax preparation firms and their software. By completing this survey, you will help the IRS in determining if this year's pilot project worked properly, provided value to the taxpayer, and if this service should be made available to all individual taxpayers. Your participation in this survey is entirely voluntary and your answers will be kept private to the fullest extent of the law. This survey should take less than five minutes to complete. Thank you for your cooperation.

Q1: Were you due a federal refund for tax year 2016?

Mark only one oval.

- Yes
 No

Q2: Have you received your federal refund for tax year 2016?

Mark only one oval.

- Yes
 No

Q3: Did you authorize your tax preparation firm (or their software) to obtain your tax refund status from the IRS on your behalf?

Mark only one oval.

- Yes
 No
 I don't remember

Q4: Did you receive messages concerning your refund status from your tax preparation firm?

Mark only one oval.

- Yes
 No (Skip to Q9)
 I don't remember (Skip to Q9)

Q5: How many messages did you receive from the tax preparation firm?

Mark only one oval.

- One message only
 Regular messages until I received my refund
 A message every time my refund status changed

- Sporadic messages
- Other _____

Q6: In what form were messages delivered?

Mark all that apply.

- Information was available when I logged into my tax preparation web site
- Text messages via my smart phone
- Email
- Personal contact or telephone call
- Other _____

Q7: Were the messages received from your tax preparation firm valuable?

Mark only one oval.

- Yes (Skip to Q9)
- No

Q8: In your opinion, how can the messages you received from your tax preparation firm be improved?

Open or closed ended.

Q9: Were the messages clear and concise?

Mark only one oval.

- Yes (Skip to Q11)
- No

Q10: In your opinion, what was unclear about the messages you received from your tax preparation firm?

Open or closed ended.

Q11: If this new service of delivering messages through your tax preparation firm was made permanently available, would you use it?

Mark only one oval.

- Yes
- No
- Not sure

Q12: If this new service of delivering messages through your tax preparation firm was not available, how would you find out about the status of your refund?

Mark all that apply.

- I would patiently wait until my refund arrived
- I would call the IRS automated telephone line
- I would call the IRS to speak with a Customer Service Representative
- I would use the IRS2Go mobile application
- I would visit the "Where's My Refund" page on the www.irs.gov website
- I would contact my tax preparation firm
- Other _____

Q13: Did you obtain any 2016 tax refund status messages directly from the IRS?

Mark all that apply.

- Yes, I called the IRS automated telephone line
- Yes, I called the IRS to speak with a Customer Service Representative
- Yes, I used the IRS2Go mobile application
- Yes, I visited the "Where's My Refund" page on the www.irs.gov website
- No (Skip to Q14)

Q14: What prompted you to contact the IRS?

Mark all that apply.

- I wanted to see if the information provided by my tax preparation firm was the same as the information provided by the IRS
- I thought I would get a faster status report about my refund
- I wanted to get up-to-date information from the IRS
- Other _____

Q15: How did the information that you received from your tax preparation firm compare to the information received directly from the IRS?

Mark all that apply.

- The information was essentially the same
- The information was identical
- The information received from the IRS was more current or more complete
- The information received from my tax preparation firm was more current or more complete

Q16: Prior to tax year 2016, which of the following IRS services have you used?

Mark all that apply.

- Obtained Refund Status (If not checked, skip to Q16)
- Got Transcripts (copies of prior year tax returns)
- Made electronic payments
- Created payment installment agreement
- Checked the status of my amended return
- Obtained tax forms
- Responded to IRS messages
- In the past, my only contact with the IRS was to file my tax return
- Other _____

Q17: Prior to tax year 2016, which of the following IRS methods did you use to check the status of your refund?

Mark all that apply.

- I called the IRS automated telephone line
- I called the IRS to speak with a Customer Service Representative
- I used the IRS2Go mobile application
- I visited the "Where's My Refund" page on the www.irs.gov website
- I called my tax preparation firm
- In the past, I have never contacted the IRS with respect to the status of my refund

Q18: In the future, which of the following tax-related tasks would you prefer to complete through your tax preparation firm?

Mark all that apply.

- Obtain tax transcripts (copies of prior tax returns)
- Review balance due information
- Review installment agreement information (e.g., due dates)
- Check the status of my amended return
- Receive electronic notices about my tax return
- No additional services should be offered through my tax preparation firm
- Other _____

Q19: Would you recommend this service to others?

Mark only one oval.

- Yes
- No

Q20: Please rate your overall experience with the Refund Status pilot project

Mark only one oval.

	1	2	3	4	
Not at all	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Extremely

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