

CFI GROUP
2017 Individual Filers Survey
Department of Treasury: Internal Revenue Service

Hello, I'm _____ with (NAME), a market research firm, calling on behalf of CFI Group. We would like to ask you about your experiences with the services you received from the Internal Revenue Service. The purpose of the research is to help the IRS improve its services to consumers like you. Your answers will remain anonymous, and your participation is voluntary. You may stop at any time or skip any question you do not wish to answer.

Your opinions are important because you have been chosen randomly to represent consumers across the United States and your responses will be added to a growing IRS database of evaluations of customer satisfaction to improve the products and services provided to you, the consumer.

The authority for requesting the information is 5 USC 301. The primary purpose of collecting this information is to improve IRS customer service. IRS may disclose information to a contractor when authorized by applicable law in order to analyze and administer the survey. Providing the information is voluntary. If you do not provide all or part of the information requested, the IRS will not be able to use information that might have been provided to improve service to you.

This interview is authorized by Office of Management and Budget Control No. 1090-0007 which expires on May 31, 2018. This interview will take approximately 10-12 minutes.

QMON. This call may be monitored or recorded for quality assurance purposes.

PROG. NOTE: Do not wait for an answer, continue with the survey unless the respondent says otherwise.

Monitoring Refusal Text: Unfortunately, I am unable to continue with the survey without your consent to have this call monitored or recorded. Thank you for your time.

QA. May I speak to the person, or one of the persons, who has the most interaction with the IRS concerning the filing of your IRS income tax return?

- 1 Yes, person available
 - 2 Yes, but not available now (Schedule callback)
 - 3 No, you cannot speak to the person
 - 4 Do not interact with the IRS
 - 5 Yes, speaking to correct person
 - DK
 - REF
-

{IF QA=3-4 OR DK OR REF, GO TO TERMINATE SCREEN; OTHERWISE CONTINUE}

(If person is available, reread intro if necessary and go to intro before Q1. If person is not available, schedule callback)

QX. Do you wish to add/change callback name?

[RECORD CONTACT FIRST NAME]

[RECORD PHONE NUMBER]

PROG. NOTE: TERMINATE SCREEN

Unfortunately, based on your responses, you do not qualify to continue with the survey. Thank you for your time and interest in taking this survey.

QAGE. For statistical purposes only, are you 18 years old or older?

Yes

No (Terminate)

QB. SCREENER: How did you file your 2016 IRS income tax return?

1. Paper form (using 1040A, 1040 EZ or 1040 Long form) – GO TO B1. PAPER FILERS
2. Electronically or Online using tax filing software – GO TO A1. ELECTRONIC FILERS
3. Don't know (TERMINATE)
4. Refused (TERMINATE)

A1. ELECTRONIC FILERS

S1. With your **2016** tax return you filed **this** year, did you include a Schedule C (for any individual business/sole proprietor income) or Schedule F (for any individual farm income)? *(Business income or farm income does not include any income from a corporation or partnership)*

- 1 Yes, Schedule C
 - 2 Yes, Schedule F
 - 3 Yes, Both Schedule C and F
 - 4 No
- DK
REF

E1. Did you use a paid practitioner when electronically filing your 2016 tax return to the Internal Revenue Service?

- 1 Yes
 - 2 No
- DK
REF

Now, I am going to ask you some questions about electronic filing of your 2016 income tax return to the Internal Revenue Service (IRS). These questions apply whether you did this filing yourself or through a practitioner such as a tax preparation service, an accountant, or an attorney...

- Q1. Before you used electronic filing, you probably knew something about the IRS electronic filing program in which you can file via a computer or through a tax preparation service or accountant. Now think back and remember your expectations of the overall quality of the electronic filing program. Please give me a rating on a 10-point scale on which "1" means your expectations were "not very high" and "10" means your expectations were "very high."

How would you rate your expectations of the overall quality of the electronic filing program?

[RECORD NUMBER 1-10]
DK
REF

Now, let's think about getting information on electronic filing...

- Q2. Was information on electronic filing difficult or easy to get? Again, we will use a 10-point scale on which "1" means "very difficult to get" and "10" means "very easy to get." How difficult or easy was it to get information on electronic filing?

[RECORD NUMBER 1-10]
DK
REF

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- Q3. Was the information clear and understandable? Using a 10-point scale on which "1" means "not very clear and understandable" and "10" means "very clear and understandable," how clear and understandable was the information on electronic filing?

[RECORD NUMBER 1-10]
DK
REF

And next, considering the filing process...

- Q4. How easy was the electronic filing process? Using a 10-point scale on which "1" means "very difficult" and "10" means "very easy," how difficult or easy was the electronic filing process?

[RECORD NUMBER 1-10]
DK
REF

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- Q5. Thinking about the cost to you in both time and/or money for preparation and filing, was the electronic filing process more costly or less costly to you than mailing in your income tax return on a paper form? Using a 10-point scale on which "1" means "**more** costly in time and/or money" and "10" means "**less** costly in time and/or money," how much more or less costly was electronic filing?

[RECORD NUMBER 1-10]
DK
REF

And thinking about getting help from the IRS on electronic filing...

- Q6. How courteous were IRS personnel with whom you had contact about electronic filing? Using a 10-point scale on which "1" means "not at all courteous" and "10" means "very courteous," how courteous were IRS personnel?

[RECORD NUMBER 1-10]

11 Did not have contact with IRS

DK

REF

{IF Q6 = 1-10, DK OR REF, ASK Q7; OTHERWISE GO TO Q10}

- Q7. How professional were personnel in terms of being helpful, responsive and knowledgeable? Using a 10-point scale on which "1" means "not at all professional" and "10" means "very professional," how professional were IRS personnel?

[RECORD NUMBER 1-10]

DK

REF

- Q8. Think about how timely responses are from the IRS. Using a 10-point scale on which "1" means "not at all timely" and "10" means "very timely," how timely are responses to information requests from the IRS?

[RECORD NUMBER 1-10]

DK

REF

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- Q9. OMITTED

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- Q10. Please consider all your experiences in the past two years with the Internal Revenue Service electronic filing program. Using a 10-point scale, on which "1" means "not very high" and "10" means "very high," how would you rate the **overall quality** of the IRS electronic filing program?

[RECORD NUMBER 1-10]

DK

REF

Satisfaction includes many things. Let's move on and talk about your overall satisfaction with the IRS electronic filing program.

- Q11. First, please consider all your experiences to date with the IRS electronic filing program. Using a 10 point scale on which "1" means "very dissatisfied" and 10 means "very satisfied," how **satisfied** are you with the IRS electronic filing program?

[RECORD NUMBER 1-10]

DK

REF

- Q12. Considering all of your expectations, to what extent has the IRS electronic filing program fallen short of your expectations or exceeded your expectations? Using a 10 point scale on which "1" now means "falls short of your expectations" and "10" means "exceeds your expectations," to what extent has the IRS electronic filing program fallen short of or exceeded your expectations?

[RECORD NUMBER 1-10]

DK

REF

- Q13. Forget the IRS for a moment. Now, I want you to imagine an ideal electronic filing program for tax returns. (PAUSE) How well do you think the IRS program compares with that ideal program? Please use a 10-point scale on which "1" means "not very close to the ideal," and "10" means "very close to the ideal."

[RECORD NUMBER 1-10]

DK

REF

Next, I want you to think about any communication you may have had with the IRS over the past two years regarding complaints about your experience with electronic filing of your tax return...

- Q14. Have you complained to the IRS within the past two years about electronic filing of your tax return?

1 Yes

2 No

DK

REF

{IF Q14 = 1, ASK Q14C-Q14D; OTHERWISE GO TO Q15}

- Q14C. How well, or poorly, was your most recent complaint handled? Using a 10-point scale on which "1" means "handled very poorly" and "10" means "handled very well," how would you rate the handling of your complaint?

[RECORD NUMBER 1-10]

DK

REF

- Q14D. How difficult or easy was it to make your most recent complaint? Using a 10-point scale on which "1" means "very difficult" and "10" means "very easy," how difficult or easy was it to make a complaint?

[RECORD NUMBER 1-10]

DK

REF

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- Q15. How likely is it that you will file your federal income tax return electronically in the future? Using a 10-point scale on which “1” means “very unlikely” and “10” means “very likely,” how likely is it that you will file your federal income tax return electronically in the future?

[RECORD NUMBER 1-10]

DK

REF

- Q16. If asked, how willing would you be to say positive things about electronic filing of tax returns to other taxpayers? Using a 10-point scale on which “1” means “not at all willing” and “10” means “very willing,” how willing are you to say positive things about electronic filing?

[RECORD NUMBER 1-10]

DK

REF

- Q17. In view of your most recent experience with the IRS, do you think that the tax filing process is fair? Using a 10-point scale on which “1” means “not at all fair” and “10” means “very fair,” how fair is the tax filing process?

[RECORD NUMBER 1-10]

DK

REF

- Q18. Do you think the Internal Revenue Service, the IRS, treats all taxpayers equally? Using a 10-point scale on which “1” means “taxpayers are treated very unequally” and “10” means “taxpayers are treated very equally,” how equally are taxpayers treated?

[RECORD NUMBER 1-10]

DK

REF

- Q19. Do you think the IRS tax filing process encourages taxpayers to cheat on their income taxes or does it encourage them to be honest? Using a 10-point scale on which “1” means “the tax filing process encourages taxpayers to cheat” and “10” means, “the tax filing process encourages taxpayers to be honest,” do you think the tax filing process encourages cheating or honesty?

[RECORD NUMBER 1-10]

DK

REF

SKIP TO DEMOGRAPHICS QUESTIONS

B1. PAPER FILERS

S1. With your **2016** tax return you filed **this** year, did you include a Schedule C (for any individual business/sole proprietor income) or Schedule F (for any individual farm income)? *(Business income or farm income does not include any income from a corporation or partnership)*

- 1 Yes, Schedule C
 - 2 Yes, Schedule F
 - 3 Yes, Both Schedule C and F
 - 4 No
 - DK
 - REF
-

P1. To begin, which of the following forms did you use when filing your **2016** tax return to the Internal Revenue Service? *(READ CODES 1-3; ACCEPT ONE MENTION)*

- 1 1040EZ (short form)
 - 2 1040 (long form)
 - 3 1040A
 - DK
 - REF
-

P2. Did you use a paid practitioner such as an income tax preparation service, an accountant or an attorney?

- 1 Yes
 - 2 No
 - DK
 - REF
-

{IF P2 =2, DK OR REF, ASK P3; OTHERWISE GO TO INTRO BEFORE Q1}

P3. Did you use a computer software program for preparing your income tax return?

- 1 Yes
 - 2 No
 - DK
 - REF
-

Now, I am going to ask you some questions about the filing of your **2016** income tax return to the Internal Revenue Service (IRS). These questions apply whether you did this filing yourself or through a practitioner such as a tax preparation service, an accountant or an attorney...

Q1. Before you filed your **2016** income tax, you probably knew something about the IRS process for filing tax returns. Now think back and remember your expectations of the overall quality of the IRS filing process. Please give me a rating on a 10 point scale on which "1" means your expectations were "not very high" and "10" means your expectations were "very high."

How would you rate your expectations of the overall quality of the IRS tax filing process?

[RECORD NUMBER 1-10]
DK
REF

Now, let's think about getting information on filing...

- Q2. Was information on income tax filing difficult or easy to get? Again, we will use a 10-point scale on which "1" means "very difficult to get" and "10" means "very easy to get." How difficult or easy was it to get information on filing?

[RECORD NUMBER 1-10]
DK
REF

- Q3. Was the information clear and understandable? Using a 10-point scale on which "1" means "not very clear and understandable" and "10" means "very clear and understandable," how clear and understandable was the information on filing?

[RECORD NUMBER 1-10]
DK
REF

And next, consider the filing process...

- Q4. How difficult or easy was the filing process? Using a 10-point scale on which "1" means "very difficult" and "10" means "very easy," how difficult or easy was the filing process?

[RECORD NUMBER 1-10]
DK
REF

- Q5. Now think about the cost to prepare your income tax—the cost in time or money or both. On a 10-point scale on which "1" means "the cost in time and/or money is very high" and "10" means, "the cost in time and/or money is very low," give me your rating of the time and/or cost to prepare your income tax for filing.

[RECORD NUMBER 1-10]
DK
REF

And thinking about getting help from the IRS...

- Q6. How courteous were IRS personnel with whom you had contact about filing? Using a 10-point scale on which "1" means "not at all courteous" and "10" means "very courteous," how courteous were IRS personnel?

[RECORD NUMBER 1-10]
1 Did not have contact with IRS
DK
REF

{IF Q6 = 1-10, DK OR REF, ASK Q7; OTHERWISE GO TO Q10}

- Q7. How professional were personnel in terms of being helpful, responsive and knowledgeable? Using a 10-point scale on which "1" means "not at all professional" and "10" means "very professional," how professional were IRS personnel?

[RECORD NUMBER 1-10]
DK
REF

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- Q8. Think about how timely responses are from the IRS. Using a 10-point scale on which "1" means "not at all timely" and "10" means "very timely," how timely are responses to information requests from the IRS?

[RECORD NUMBER 1-10]
DK
REF

Q9. OMITTED

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- Q10. Please consider all your experiences in the past two years with the Internal Revenue Service filing process. Using a 10-point scale, on which "1" means "not very high" and "10" means "very high," how would you rate the **overall quality** of the IRS filing process?

[RECORD NUMBER 1-10]
DK
REF

Satisfaction includes many things. Let's move on and talk about your overall satisfaction with the IRS filing process.

- Q11. First, please consider all your experiences to date with the IRS tax filing process. Using a 10-point scale on which "1" means "very dissatisfied" and 10 means "very satisfied," how **satisfied** are you with the IRS tax filing process?

[RECORD NUMBER 1-10]
DK
REF

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- Q12. Considering all of your expectations, to what extent has the IRS tax filing process fallen short of your expectations or exceeded your expectations? Using a 10-point scale on which "1" now means "falls short of your expectations" and "10" means "exceeds your expectations," to what extent has the IRS tax filing process fallen short of or exceeded your expectations?

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DK

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Q13. Forget the IRS for a moment. Now, I want you to imagine an ideal federal tax filing process. (PAUSE) How well do you think the IRS process compares with that ideal process? Please use a 10-point scale on which "1" means "not very close to the ideal," and "10" means "very close to the ideal."

[RECORD NUMBER 1-10]
DK
REF

Next, I want you to think about any communication you may have had with the IRS over the past two years regarding complaints about your experience with the filing of your tax return...

Q14. Have you complained to the IRS within the past two years about filing your tax return?

1 Yes
2 No
DK
REF

{IF Q14 = 1, ASK Q14C-Q14D; OTHERWISE GO TO Q15A}

Q14C. How well, or poorly, was your most recent complaint handled? Using a 10-point scale on which "1" means "handled very poorly" and "10" means "handled very well," how would you rate the handling of your complaint?

[RECORD NUMBER 1-10]
DK
REF

Q14D. How difficult or easy was it to make your most recent complaint? Using a 10-point scale on which "1" means "very difficult" and "10" means "very easy," how difficult or easy was it to make a complaint?

[RECORD NUMBER 1-10]
DK
REF

Q15A. In view of your most recent experience with the IRS, do you think that the tax filing process is fair? Using a 10-point scale on which "1" means "not at all fair" and "10" means "very fair," how fair is the tax filing process?

[RECORD NUMBER 1-10]
DK
REF

- Q15B. Do you think the Internal Revenue Service, the IRS, treats all taxpayers equally? Using a 10-point scale on which "1" means "taxpayers are treated very unequally" and "10" means "taxpayers are treated very equally," how equally are taxpayers treated?

[RECORD NUMBER 1-10]

DK

REF

- Q16. Do you think the IRS tax filing process encourages taxpayers to cheat on their income taxes or does it encourage them to be honest? Using a 10-point scale on which "1" means "the tax filing process encourages taxpayers to cheat" and "10" means, "the tax filing process encourages taxpayers to be honest," do you think the tax filing process encourages cheating or honesty?

[RECORD NUMBER 1-10]

DK

REF

DEMOGRAPHICS

Now, I have a few final questions that will help us in grouping your responses with others that are similar to you.

- QD1. What is your age, please?

1. 18-24
2. 25-44
3. 45-64
4. 65-80
5. Over 80
6. Don't Know
7. REFUSED

- QD2. What is the highest level of education that you have completed?

1. Less than high school
2. High school graduate
3. Some college or associate degree
4. College graduate
5. Post-graduate
6. Don't Know
7. REFUSED

- QD3. Do you consider your race(s) as: (allow for multiple responses)

1. White
2. Black or African American
3. American Indian or Alaska Native
4. Asian
5. Native Hawaiian or other Pacific Islander
6. Other race
7. Don't Know

8. REFUSED

QD4. Are you of Hispanic, Latino or Spanish origin?

1. Yes
2. No
3. Don't Know
4. REFUSED

QD5. What was your total family income in **2016** before taxes? (READ CODES 1-7 AS NECESSARY)

1. Less than \$20,000
2. Between \$20,000 and \$29,999
3. Between \$30,000 and \$39,999
4. Between \$40,000 and \$59,999
5. Between \$60,000 and \$79,999
6. Between \$80,000 and \$99,999
7. \$100,000 or more
8. Don't Know
9. Refused

QD6. Gender (By Observation)

1. Male
2. Female

PROG. NOTE: THANK AND TERMINATE

Those are all the questions I have for you. Thank you for your time and valuable opinions!