

W&I Asian Limited-English Proficient Taxpayers

Language Needs Assessment Survey

Version: Final Questionnaire 11/29/18

Introduction (Spoken):

Pacific Consulting Group, an independent national research organization, is conducting a survey on behalf of the Federal Government. You will be offered \$20 cash to complete the survey. The survey should take you about 15 minutes to complete. We are asking people to take this anonymous survey about their experiences preparing and filing taxes. We will not ask you for any personal information that would identify you. Your feedback is valuable because it will help improve services for taxpayers. Your participation is voluntary.

We will ask you a few questions to determine if this survey is relevant to you. If it is, we will ask you to complete it on this tablet/laptop computer.

[Gain consent to continue]

As I mentioned, this survey is being conducted for the Federal Government by an independent national research organization, Pacific Consulting Group. Your answers are anonymous and no personal identifying information will be released to the government to the extent permitted by law. Your responses will be combined with others and reported collectively.

I also need to inform you that the OMB Control Number for this study is 1545-1432. You can reference this number if you decide to get further information about this study. If you have any questions about this survey, I will provide you with a mailing address once you have completed the survey.

Thank you for agreeing to participate. I will start with a few questions to determine if this survey is relevant to you.

Provide contact information on a printed page after completion of the survey:

The OMB Control Number for this study is 1545-1432. If you have any questions or concerns about this survey, please contact the Internal Revenue Service, Special Services Section, 1111 Constitution Ave. NW, SE:W:CAR:MP:T:M:S, Room 6129, Washington, DC 20224.

1. Screener (Spoken)

1.1 What language do you usually speak at home?

- Mandarin
- Cantonese [TERMINATE]
- Korean
- Vietnamese
- English [TERMINATE]
- Others [TERMINATE]

1.2 How well do you speak and understand English?

- Very well [TERMINATE]
- Well [TERMINATE]
- Not well
- Not at all

1.3 How well can you read and write English?

- Very well [TERMINATE]
- Well [TERMINATE]
- Not well
- Not at all

1.4 How well do you read [Mandarin/Vietnamese/Korean– ASK BASED ON RESPONSE TO Q1.1]?

- Very well
- Well
- Not well [TERMINATE]
- Not at all [TERMINATE]

1.5 Have you filed taxes (last year or this year) for personal income or business-related income earned in 2017 or 2018?

- Yes, for personal income
- Yes, for business-related income
- Yes, both personal and business-related income
- No [TERMINATE]
- Don't know [TERMINATE]

1.6 Are you self-employed (such as an independent contractor) or do you own a small business?

- Self-employed
- Small business owner
- Neither self-employed nor small business owner

1.7 [ASK IF SELF EMPLOYED OR SMALL BUSINESS OWNER] Have you paid any business taxes in 2017 or 2018?

- Yes
- No

[Direct participant to the tablet/computer to continue the survey]

2. Tax Knowledge & Other Barriers

2.1 For each of the following statements, please indicate whether you strongly agree, agree, disagree, or strongly disagree.

	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't know/ Not sure
It is every American's civic duty to pay their fair share of taxes	1	2	3	4	9
Paying taxes has social benefits for me	1	2	3	4	9
It is mandatory to pay my taxes	1	2	3	4	9
I trust the IRS to help me understand my taxes	1	2	3	4	9
I trust the IRS to fairly enforce the tax laws	1	2	3	4	9
I trust the IRS to protect my tax account records from Identity theft	1	2	3	4	9

3. Preparing and filing taxes

3.1 How did you prepare your federal income tax forms? Select all that apply.

- Manually by myself without additional help [EXCLUSIVE]
- Using a tax preparation software
- With the help of a friend or family member
- With the help of an IRS service representative
- With the help of a volunteer preparer from a community organization
- By professional tax preparer, accountant, or bookkeeper
- Some other way
- Don't know

3.2 How difficult was it for you to prepare your federal income tax forms?

- Very easy
- Somewhat easy
- Somewhat difficult
- Very difficult

3.3 [ASK IF VERY /SOMEWHAT EASY] Why was it easy to prepare your income tax forms?
[OPEN ENDED]

[ASK IF VERY /SOMEWHAT DIFFICULT] Why was it difficult to prepare your income tax forms? [OPEN ENDED]

3.4 How did you file your federal income tax forms?

- By mailing paper forms (in Hardcopy)
- Electronically (e-filing)
- Don't know

3.5 How difficult was it for you to file your federal income tax forms?

- Very easy
- Somewhat easy
- Somewhat difficult
- Very difficult

3.6 [ASK IF "By mailing paper forms" SELECTED IN Q3.4] Are you aware that it is possible to electronically file your tax forms?

- Yes
- No

3.7 [ASK IF 'YES' IN Q3.6 – AWARE OF E-FILE BUT DID NOT E-FILE TAXES] What was the reason you did not file your taxes electronically? Select all that apply.

- I think the IRS charges a fee to electronically file
- My tax preparer charges a fee to electronically file
- My tax preparer didn't offer this as an option
- I like to review the paper version before filing
- I want to place my tax forms in the mailbox myself
- I didn't have access to a computer/smartphone to review electronic documents
- Other reason

4. Getting general tax Information and advice

4.1 Which of the following sources, would you definitely use, probably use, probably would not use or definitely would not use to get information and advice on tax-related matters such as tax law, refund status, issues with tax returns etc.?

Grid Options: 1. Definitely would use 2. Probably would use 3. Probably would not use 4. Definitely would not use

1. IRS Toll-Free line
2. IRS website (www.IRS.gov)
3. Face-to-face interaction at local IRS office (Taxpayer Assistance Center, walk-in center)
4. Self-service kiosks at Taxpayer Assistance Centers
5. Regular mail to the IRS
6. E-mail to the IRS
7. Translated written IRS documents
8. IRS2Go App (for smartphone or tablet mobile device)
9. Community-based tax clinics
10. Volunteer tax preparer from a community organization
11. Professional tax preparer, accountant, or bookkeeper
12. Friend or family member

4.2 [ASK FOR EACH IRS CHANNEL (1-8) FOR WHICH 'PROBABLY/ DEFINITELY WOULD NOT USE' IS SELECTED IN Q 4.1 – LIMIT TO 2 OPTIONS]: Why would you not use _____[PIPE IN OPTION] for getting tax information or advice?

5. Getting Assistance with a specific Tax Issue/Problem

5.1 Which of the following sources would you definitely use, probably use, probably would not use or definitely would not use to get help and advice on tax related issues such as a notice from the IRS?

Grid Options: 1. Definitely would use 2. Probably would use 3. Probably would not use 4. Definitely would not use

1. IRS Toll-Free line
2. IRS website (www.IRS.gov)
3. Face-to-face interaction at local IRS office (Taxpayer Assistance Center, walk-in center)
4. Self-service kiosks at Taxpayer Assistance Centers
5. Regular mail to the IRS
6. E-mail to the IRS
7. Translated written IRS documents
8. IRS2Go App (for smartphone or tablet mobile device)
9. Community-based tax clinics
10. Volunteer tax preparer from a community organization
11. Professional tax preparer, accountant, or bookkeeper
12. Friend or family member

5.2 [ASK FOR EACH IRS CHANNEL (1-8) FOR WHICH 'PROBABLY/ DEFINITELY WOULD NOT USE' IS SELECTED IN Q5.1 – LIMIT TO 2 OPTIONS]: Why would you not use _____[PIPE IN OPTION] for getting help and advice on tax related issues?

6. Awareness of IRS LEP Services

6.1 Are you aware that you can get information or help such as finding forms or tax law information, checking refund status or getting help resolving a notice from the IRS in the following ways in _____(LANGUAGE IN Q1.1)?

Grid Options: 1. Yes; 2. No

1. Calling an IRS Toll-Free line and getting assistance in your primary language
2. Visiting your primary language section of the IRS website
3. Visiting a local IRS office (Taxpayer Assistance Center, walk-in center) and getting assistance in your primary language
4. Sending regular mail to the IRS in your primary language
5. Sending E-mail to the IRS in your primary language
6. Written IRS documents in your primary language
7. Community-based tax clinics
8. Your primary language speaking volunteer preparers from a community organization

6.2 [ASK if YES for 2/IRS website] Which of the following services/tools on the IRS _____(LANGUAGE IN Q1.1) website are you aware of?

Grid Options: 1. Yes; 2. No

1. File your taxes
2. IRSDirect Pay (pay money you owe the IRS securely directly from your bank account for free)
3. Online Employer Identification Number (EIN)
4. General Individual Tax Identification Number (ITIN) Information
5. Where's My Refund?
6. Where's My Amended Return?
7. Get Transcript

6.3 [ASK SERVICES/TOOL FOR WHICH 'YES' IS SELECTED IN Q6.2] Which of the following services/tools on the IRS _____(LANGUAGE IN Q1.1) website have you ever used?

Grid Options: 1. Yes; 2. No

1. File your taxes
2. IRS Direct Pay (pay money you owe the IRS securely directly from your bank account for free)
3. Online Employer Identification Number (EIN)
4. General Individual Tax Identification Number (ITIN) Information
5. Where's My Refund?
6. Where's My Amended Return?
7. Get Transcripts

6.4 Do you think that the IRS should advertise its products and services in _____ (LANGUAGE IN Q1.1) more than it currently does?

- Yes
- No

6.5 [ASK IF YES] Where should the IRS advertise its products and services in _____ (LANGUAGE IN Q1.1)? Select all that apply.

1. Newspaper/Magazine
2. TV
3. Mail inserts
4. Internet ads
5. Emails
6. Brochures/Flyers
7. Seminars
8. Subway Signs
9. Grocery stores and libraries
10. From professional tax preparers
11. Billboards
12. Yellow pages
13. Social media

7. Use of IRS LEP Services

7.1 [ASK FOR EACH IRS SERVICE (1-7) AWARE OF IN Q6.1/YES SELECTED] Did you use any of the following IRS services this year when you were preparing and paying taxes?

Grid Options: 1. Yes; 2. No 3. Don't remember

1. Calling an IRS Toll-Free line and getting assistance in your primary language
2. Visiting the your primary language) section of the IRS website
3. Visiting a local IRS office (Taxpayer Assistance Center, walk-in center) and getting assistance in your primary language
4. Sending regular mail to the IRS in your primary language
5. Sending E-mail to the IRS in your primary language
6. Written IRS documents in your primary language

ASK Q7.2 FOR EACH IRS SERVICE FOR WHICH 'YES' IS SELECTED IN Q7.1

7.2 Overall how satisfied were you with your experience using ...

Grid Options:

- Very Satisfied
- Somewhat satisfied
- Somewhat dissatisfied
- Very dissatisfied

(PIPE IN SERVICES FOR WHICH 'YES' SELECTED IN Q7.1)

1. Calling an IRS Toll-Free line and getting assistance in your primary language
2. Visiting your primary language) section of the IRS website
3. Visiting a local IRS office (Taxpayer Assistance Center, walk-in center) and getting assistance in your primary language
4. Sending regular mail to the IRS in your primary language
5. Sending E-mail to the IRS in your primary language
6. Written IRS documents in your primary language

7.3 [ASK IF SOMEWHAT/VERY DISSATISFIED] What was the reason you were dissatisfied with using _____(PIPE IN SERVICE SOMEWHAT/VERY DISSATISFIED IN Q7.2)? [OPEN ENDED]

ASK Q7.4/7.5 FOR EACH IRS SERVICE FOR WHICH 'NO' IS SELECTED IN Q7.1

7.4 Which of these services would you definitely use, probably use, probably would not use or definitely would not use the next time you have to prepare and pay your taxes?

Grid Options: 1. Definitely would use 2. Probably would use 3. Probably would not use 4. Definitely would not use

(PIPE IN SERVICE FOR WHICH 'NO' SELECTED IN Q7.1)

1. Calling an IRS Toll-Free line and getting assistance in your primary language
2. Visiting your primary language) section of the IRS website
3. Visiting a local IRS office (Taxpayer Assistance Center, walk-in center) and getting assistance in your primary language

4. Sending regular mail to the IRS in your primary language
5. Sending E-mail to the IRS in your primary language
6. Written IRS documents in your primary language
7. IRS Mobile Apps (for smartphone or tablet mobile device) in your primary language

ASK FOR EACH IRS SERVICE FOR WHICH 'Definitely would not use' IS SELECTED IN Q7.4:

7.5 Why would you not use _____ (SERVICE FOR WHICH 'Probably/ Definitely would not use' SELECTED IN Q7.4 – LIMIT TO 2 OPTIONS) [OPEN ENDED]

8. Business-Specific Questions

8.1 [ASK IF SELF EMPLOYED OR SMALL BUSINESS OWNER IN Q1.6] Please select the correct option. As a self-employed taxpayer/ small business owner I am required to pay business taxes ...

- Once every 3 months (quarterly)
- Once a year (annually)
- I'm not sure

8.2 [ASK IF SELF-EMPLOYED OR SMALL BUSINESS OWNER IN Q1.6] What type of business are you in?

- Finance and insurance
- Health services
- Beauty/nail shop
- Day care services
- Dry cleaning services
- Hotel/Restaurant
- General Wholesale/Retail
- Grocery store
- Apparel and clothing wholesale/retail
- Construction
- Manufacturing
- Transportation, Warehousing, Utilities
- Other (please specify) _____

8.3 [ASK IF SELF EMPLOYED OR SMALL BUSINESS OWNER IN Q1.6] Which of the following categories describes your annual business revenue before taxes last year?

- Under \$30,000
- \$30,000 to less than \$50,000
- \$50,000 to less than \$75,000
- \$75,000 to less than \$100,000
- \$100,000 to less than \$150,000
- \$150,000 and over
- Prefer not to answer

8.4 [ASK IF SELF EMPLOYED OR BUSINESS OWNER IN Q1.6] Which range best describes how many employees you have?

- Work on my own
- 1-5
- 6-10
- 11-20
- 21-30
- 31 or more
- Prefer not to answer

9. 9.Demographic Questions

9.1 Are you....?

- Male
- Female
- Other
- Prefer not to answer

9.2 What is your age?

- 18-30
- 31-45
- 46-60
- 61-75
- 75 and over
- Prefer not to answer

9.3 [ASK THOSE WHO SELECTED 'Neither self-employed nor small business owner' IN Q8.1] 'Are you, yourself, currently employed...

- Full-time
- Part-time
- Not employed
- Retired
- Prefer not to answer

9.4 What is the last grade of school you completed?

- Did not complete high school
- High school graduate/certificate
- Some college/tertiary education
- Under graduate college/University degree
- Post graduate college/University degree
- Trade/Technical school
- Prefer not to answer

9.5 We try to classify people into broad income groups. To do this, would you please indicate which of the following categories most closely represents your annual household income?

- Under \$30,000
- \$30,000 to less than \$50,000
- \$50,000 to less than \$75,000
- \$75,000 to less than \$100,000
- \$100,000 to less than \$150,000
- \$150,000 and over
- Prefer not to answer

Thank you for participating in our survey today.