

# 2017 Tax Time Savings Initiative Output Data Collection Template

Thank you for your participation in the CFPB's Tax Time Savings Initiative, and for agreeing to provide this information about your program's efforts to promote savings among the taxpayers with whom you work. Through this data collection template, we are hoping to collect information from your program about the number of tax returns filed through your sites, as well as the number of taxpayers who participated in various savings-related activities. While providing these data is strictly voluntary, the information you provide will be extremely helpful to the Bureau in documenting the outcomes of your hard work.

Please note that the Bureau intends to keep your responses private to the extent permitted by law, and when results are reported none of your answers will be connected to your organization.

We estimate that this survey will take no more than 30 minutes to complete. We would appreciate your reply by May 15, 2017". If you have any questions, please contact [ICF survey contact] at [phone number] or [email address].

## **Privacy Act Statement**

### **5 U.S.C. 552(a)(e)(3)**

The information you provide through your responses to the Consumer Financial Protection Bureau ("CFPB") will assist us in learning about your program's efforts to promote savings among the taxpayers with whom you work.

The CFPB will access basic contact information such as your name, address, phone number, email address, or mailing address.

Information collected by the CFPB will be treated in accordance with the System of Records Notice ("SORN"), [CFPB.021 Consumer Education and Engagement Records, 79 FR 78839](#). This information will not be disclosed as outlined in the Routine Uses for the SORN. Direct identifying information will only be used by CFPB to facilitate the study and will be kept private except as required by law.

This collection of information is authorized by Pub. L. No. 111-203, Title X, Sections 1013 and 1022, codified at 12 U.S.C. §§ 5493 and 5512.

Participation in this study is voluntary, you are not required to participate or share any identifying information with CFPB, and you may withdraw participation at any time.

### **Paperwork Reduction Act Statement**

According to the Paperwork Reduction Act of 1995, “an agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless it displays a valid Office of Management and Budget (OMB) control number.” The OMB control number for this collection is 3170-0036 and expires 8/31/2019. The time required to complete this information collection is estimated to average approximately 30 minutes per response. Comments regarding this collection of information—including the estimated response time, suggestions for improving the usefulness of the information, or suggestions for reducing the burden to respond to this collection—should be submitted to the Consumer Financial Protection Bureau (Attention: PRA Office), 1700 G Street NW, Washington, DC 20552, or by email to CFPB\_PRA@cfpb.gov.

- 1. Did all of your sites participate in the CFPB Tax Time Savings Initiative? (Yes, all of my tax sites participated in the CFPB Tax Time Savings Initiative/No, some of my tax sites participated in the CFPB Tax Time Savings Initiative and others did not)**

*If “Yes,” respondents will be asked Question 2 and then Questions 4 and 5.*

*If “No,” respondents will be asked Question 3 and then Questions 4 and 5.*

- 2. Please complete the following table based on tax returns filed at your tax sites.**

a) Number of tax returns prepared	
b) Number of tax returns prepared that claimed an Earned Income Tax Credit (EITC)	
c) Number of tax returns prepared that claimed a refund	
d) Number of tax returns prepared that used direct deposit to receive their refund	
e) Number of tax returns prepared that split their refund using IRS form 8888	
f) Number of tax returns that purchased a U.S. Series I savings bond	
g) Number of tax returns prepared that	

deposited a portion of their refund into a myRA	
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- 3. Please complete the following table. The numbers in the first column should reflect tax returns filed at all of your program’s tax sites, and the numbers in the second column should reflect only tax returns filed at sites participating in the CFPB Tax Time Savings Initiative.**

	All Tax Sites	Sites Participating in CFPB Initiative
a) Number of tax returns prepared		
b) Number of tax returns prepared that claimed an Earned Income Tax Credit (EITC)		
c) Number of tax returns prepared that claimed a refund		
d) Number of tax returns prepared that used direct deposit to receive their refund		
e) Number of tax returns prepared that split their refund using IRS form 8888		
f) Number of tax returns that purchased a U.S. Series I savings bond		
g) Number of tax returns prepared that deposited a portion of their refund into a myRA		

- 4. If you left any of the entries in the table blank, could you explain why?**
- 5. Are there any other numerical measures that you use to measure how well tax savings strategies have worked at your sites? If so, what are they, and what were your results for the 2017 tax season?**

Thank you!