

Hello! Thank you for participating in The MITRE Corporation's voluntary taxpayer questionnaire. MITRE is a not-for-profit organization that operates federally funded research and development centers (FFRDCs) to support the government with objective research and work for the public good.

The purpose of this questionnaire is to better understand why taxpayers file their taxes the way they do in order to improve taxpayers' experiences. The information you share with us today will be used for research purposes only, and we will not ask you for any personal tax information.

Your participation in this questionnaire is completely voluntary and will take about 15 minutes. You must complete the entire questionnaire in order to receive the \$20 Amazon.com gift card. At the end of this questionnaire, you will be asked to enter your email address so that we can send you the gift card, which you will receive within 24 hours after completion.

Privacy Act and Paperwork Reduction Act Notice

Our authority for requesting information with this survey is 5 U.S.C. Section 301, and 26 U.S.C. Sections 7801, 7803, and 7805 and the Paperwork Reduction Act. The information you provide allows the IRS to analyze the role of taxpayer burden in tax administration. This information is also used to fulfil the IRS's statutory obligations to the Office of Management and Budget and Congress for information required by the Paperwork Reduction Act, and to provide tax policy analysis support to the Office of Tax Analysis at the Department of the Treasury. This information will also help us to better understand taxpayer needs and burden reduction opportunities.

Data collected will be shared with IRS staff, but your responses will be used for research and aggregate reporting purposes only and will not be used for other non-statistical or non-research purposes such as direct enforcement activities. The information that you provide will be protected as required by law. We estimate that it will take 15 minutes to complete this survey, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Providing the information is voluntary; not providing all or part of the information requested will have no impact on you but may reduce our ability to address taxpayer concerns regarding paperwork reduction.

We may not conduct or sponsor, and you are not required to respond to, a collection of information unless it displays a valid OMB control number. The OMB number for this survey is 1545-1349. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden to: IRS, Special Services Section, SE:W:CAR:MP:T:M:S, Room 6129, 1111 Constitution Avenue, NW, Washington, DC 20224. **[Next screen]**

Section A: For all Participants

My Current Filing Methods

First, let's make sure you qualify for this survey. Thinking back to your last federal income tax return filing experience, what method did you use to prepare and file (submit) your taxes?

- I used a paid tax preparer **[Next screen – Jump to Section B1]**

- I used a free government program: IRS Free File program [**Next screen - Jump to Section B2**]
- I used a do-it-yourself (DIY) tax software program (not Free File) [**Next screen - Jump to Section B3**]
- I filled out a paper form [**Next screen - Jump to Section B4**]
- I used a free government program: IRS Volunteer Income Tax Assistance (VITA) program [**Next screen - Jump to Section B5**]

Section B: Current Filing Method.

Note: There is a separate section for each method of tax filing. At the end of Section B, all participants continue to Section C.

Section B1: If "I used a paid preparer"

I Used A Paid Preparer

What were the main reasons why you chose to use a paid preparer? (Choose up to five responses.)

- I've used this method before
- This method is a lower cost than other methods
- It's easy for me to use this method
- This method has better accuracy than other methods
- This method is faster to prepare the tax return than other methods
- I'm less likely to get audited using this method
- This method gets me my refund faster
- This method provides many payment options
- This method is more secure than other methods
- This method makes it easy for me to get every possible deduction and credit I qualify for
- It's easy for me to get help or customer support if I needed help with this method
- This method was recommended to me by someone whose opinion I trust
- This method allows me to retain information from my previous year's return

What kind of paid preparer do you use?

- A national chain (e.g., H&R Block, Liberty Taxes, Jackson-Hewitt)
- An independent firm or individual

What is the main reason you chose to use a paid preparer to prepare your return?

- My taxes are complicated, I'd rather someone with more expertise than me do them
- I could do my own taxes, but I'd prefer not to spend the time it takes
- I can get live customer service if I need help
- A paid preparer can better find all the deductions I qualify for
- Other (please specify):

Do you use the same preparer each year?

- Yes
- No

How did you choose your tax preparer?

- I saw or heard an ad for them
- Someone I trust referred them to me
- I searched for preparers in my area with high ratings
- Other (please specify):

Please indicate any "extras" (like "audit protection" or "advance refund") from your paid preparer.

Received

- Audit protection
- Identity Theft Protection
- Access to customer service
- Gift Card
- Advance Refund
- Other (please specify):
- I did not receive any extras

To what extent did being able to receive the extra(s) influence your decision to use a paid preparer?

- To an extremely small extent
- To a small extent
- To a moderate extent
- To a large extent
- To an extremely large extent

Have you used any other method to file taxes within the past 10 years?

- No, I've always used a paid preparer to file my taxes within the past 10 years
- Yes, I used IRS Free File in the past 10 years
- Yes, I used an IRS Volunteer Income Tax Assistance site within the past 10 years
- Yes, I used a do-it-yourself software or online program within the past 10 years
- Yes, I prepared and filed a paper return within the past 10 years

If "Yes, I used Free File" add the following question:

Why did you switch to a paid preparer?

- I became ineligible
- My return became too complex to complete myself
- I no longer had the time or desired to spend the time completing my return myself
- I no longer want to go through IRS.gov to file my taxes
- Other (state reason):

If “Yes, I used VITA” add the following question:

Why did you switch to a paid preparer?

- I became ineligible
- It became inconvenient to visit the site
- My return became too complex
- Other (state reason):

If “Yes, I used DIY” add the following question:

Why did you switch to a paid preparer?

- My return became too complex to complete myself
- I no longer had the time or desired to spend the time completing my return myself
- Other (state reason):

If “Yes, I prepared and filed on paper” add the following question:

Why did you switch to a paid preparer?

- Electronic methods were easier
- My return became too complex to complete myself
- I no longer had the time or desired to spend the time completing my return myself
- Other (state reason):

Return to survey for all who used paid preparer:

Thinking about other ways to file your taxes, please rate the likelihood that you would ever use a do-it-yourself software or online program.

- Not at all likely
- Slightly likely
- Moderately likely
- Very likely
- Extremely likely

Please select the statement below that would most apply to your rating about do-it-yourself software or online program.

- I would probably choose this method because I think it would be easiest
- I would probably choose this method if my taxes became less complicated
- I would probably choose this method because it would be less costly
- I would probably choose this method for some other reason (please specify):
- I would probably not choose this method because I prefer someone else to do my taxes
- I would probably not choose this method for some other reason (please specify):

Thinking about other ways to file your taxes, please rate the likelihood that you would ever use IRS Free File. (*IRS Free File provides free online tax preparation and filing options on IRS partner sites. IRS partners are online tax preparation companies that develop and deliver this service at no cost to qualifying taxpayers. Taxpayers whose adjusted gross income (or AGI) is \$72,000 or less qualify for IRS Free File partner offers.*)

- Not at all likely
- Slightly likely
- Moderately likely
- Very likely
- Extremely likely

Please select the statement below that would most apply to your rating about IRS Free File.

- I would probably choose this method if my income dropped and I became eligible
- I would probably choose this method now that I realize I'm currently eligible
- I would probably choose this method for some other reason (please specify):
- I would probably not choose this method because I don't want to go through the IRS site
- I would probably not choose this method because I don't trust government programs
- I would probably not choose this method for some other reason (please specify):

Thinking about other ways to file your taxes, please rate the likelihood that you would ever use IRS Volunteer Income Tax Assistance. (*The IRS's Volunteer Income Tax Assistance (VITA) program offer free basic tax return preparation by IRS-trained volunteers to qualified individuals, such as: people who generally make \$57,000 or less, persons with disabilities; and Limited English-speaking taxpayers who need assistance in preparing their own tax returns.*)

- Not at all likely
- Slightly likely
- Moderately likely
- Very likely
- Extremely likely

Please select the statement below that would most apply to your rating about IRS Volunteer Income Tax Assistance.

- I would probably choose this method if there was a VITA site convenient to me
- I would probably choose this method if my income dropped and I became eligible
- I would probably choose this method now that I realize I'm currently eligible
- I would probably choose this method for some other reason (please specify):
- I would probably not choose this method because I don't think I need help filling out my tax return

- I would probably not choose this method because I don't trust a volunteer to help me prepare my taxes
- I would probably not choose this method for some other reason (please specify):

Thinking about other ways to file your taxes, please rate the likelihood that you would ever fill out a paper tax form and mail it to the IRS on a scale of 1 to 5.

- Not at all likely
- Slightly likely
- Moderately likely
- Very likely
- Extremely likely

Please select the statement below that would most apply to your rating about filling out a paper tax form and mailing it to the IRS

- I would probably use this method (specify reason):
- I would probably not use this method (specify reason):

Do you think there might be circumstances that would cause you to switch your filing method?

- Yes, I can see myself switching if the circumstances were right
- No, I believe I will always use this method to file my taxes

[Next Screen - To Section C for all participants]

Section B2: If “I used a free government program: IRS Free File Program”

I Used A Free Government Program: IRS Free File

What were the main reasons why you chose IRS Free File? (Choose up to five responses.)

- I've used this method before
- This method is a lower cost than other methods
- It's easy for me to use this method
- This method has better accuracy than other methods
- This method is faster to prepare the tax return than other methods
- I'm less likely to get audited using this method
- This method gets me my refund faster
- This method provides many payment options
- This method is more secure than other methods
- This method makes it easy for me to get every possible deduction and credit I qualify for
- It's easy for me to get help or customer support if I needed help with this method
- This method was recommended to me by someone whose opinion I trust
- This method allows me to retain information from my previous year's return

What was the main reason you chose IRS Free File to file your tax return?

- Because it's free
- Filing through IRS Free File gives me a greater sense of comfort/ease than going to a commercial tax program
- Choosing a tax software program through IRS Free File gives me greater confidence that my tax return will be completely free even if my return has many schedules and attachments

How did you hear about the IRS Free File program?

- I saw an ad or banner in the media or on the internet
- Someone I trust told me about it
- I found it in an internet search for free tax filing
- I found it on IRS.gov
- Other (please specify):

Why did you choose the brand of software/online program you currently use? (Select all that apply.)

- Name recognition (it's a popular brand)
- I've used this software program before
- I randomly chose it from those Free File programs I was eligible for
- It was the only brand that I was eligible for
- This software program is easier for me to use than other software programs
- This software program was recommended by someone I trust

- This software program allows me to use retained information from my previous returns
- Other reasons (please specify):

Have you used any other method to file taxes within the past 10 years?

- No, I've always used the IRS Free File program to file my taxes
- Yes, I used an IRS Volunteer Income Tax Assistance site within the past 10 years
- Yes, I used a paid preparer within the past 10 years
- Yes, I prepared and filed a paper return within the past 10 years
- Yes, I used a do-it-yourself software or online program within the past 10 years

If "Yes, I used VITA" add the following question:

Why did you switch to the IRS Free File program?

- I became ineligible
- It became inconvenient to visit the site
- I decided I could prepare my return myself
- Other (state reason):

If "Yes, I used a paid preparer" add the following question:

Why did you switch to the IRS Free File program?

- It became too expensive
- I decided I could prepare my tax return myself
- Other (state reason):

If "Yes, I prepared and filed on paper" add the following question:

Why did you switch to the IRS Free File program?

- Electronic methods were easier
- Other (state reason):

If "Yes, I used DIY" add the following question:

Why did you switch to the IRS Free File program?

- I became aware of Free File
- I became eligible for Free File
- Other (state reason):

Return to survey for all Free Filers:

Thinking about other ways to file your taxes, please rate the likelihood that you would ever use a do-it-yourself software or online program.

- Not at all likely
- Slightly likely
- Moderately likely
- Very likely
- Extremely likely

Please select the statement below that would most apply to your rating about do-it-yourself software or online program.

- I would probably choose this method because I think it would be easiest
- I would probably choose this method if my taxes became less complicated
- I would probably choose this method because it would be less costly
- I would probably choose this method for some other reason (please specify):
- I would probably not choose this method because I prefer someone else to do my taxes
- I would probably not choose this method for some other reason (please specify):

Thinking about other ways to file your taxes, please rate the likelihood that you would ever use a Paid Preparer.

- Not at all likely
- Slightly likely
- Moderately likely
- Very likely
- Extremely likely

Please select the statement below that would most apply to your rating about a Paid Preparer.

- I would probably choose this method if my taxes became too complicated for me to do them myself
- I would probably choose this method if I decided I no longer have the time or prefer not to spend time doing my taxes
- I would probably choose this method for some other reason (please specify):
- I would probably not choose this method because it's too expensive
- I would probably not choose this method because I don't trust my financial information with someone else
- I would probably not choose this method for some other reason (please specify):

Thinking about other ways to file your taxes, please rate the likelihood that you would ever use IRS Volunteer Income Tax Assistance. *(The IRS's Volunteer Income Tax Assistance (VITA) program offer free basic tax return preparation by IRS-trained volunteers to qualified individuals, such as: people who generally make \$57,000 or less, persons with disabilities; and Limited English-speaking taxpayers who need assistance in preparing their own tax returns.)*

- Not at all likely
- Slightly likely
- Moderately likely
- Very likely
- Extremely likely

Please select the statement below that would most apply to your rating about IRS Volunteer Income Tax Assistance.

- I would probably choose this method if there was a VITA site convenient to me
- I would probably choose this method if my income dropped and I became eligible
- I would probably choose this method now that I realize I'm currently eligible
- I would probably choose this method for some other reason (please specify):
- I would probably not choose this method because I don't think I need help filling out my tax return
- I would probably not choose this method because I don't think volunteer tax preparers are good at their job
- I would probably not choose this program because I don't think volunteer tax preparers have the same motivation to help me as paid preparers
- I would probably not choose this program because I don't want to travel to a different location to prepare and file my taxes
- I would probably not choose this method for some other reason (please specify):

Thinking about other ways to file your taxes, please rate the likelihood that you would ever fill out a paper tax form and mail it to the IRS.

- Not at all likely
- Slightly likely
- Moderately likely
- Very likely
- Extremely likely

Please select the statement below that would most apply to your rating about filling out a paper tax form and mailing it to the IRS

- I would probably use this method (specify reason):
- I would probably not use this method (specify reason):

Do you think there might be circumstances that would cause you to switch your filing method?

- Yes, I can see myself switching if the circumstances were right
- No, I believe I will always use this method to file my taxes

[Next screen - To Section C for all participants]

Section B3: If “I used a do-it-yourself (DIY) tax software program (Not Free File)”

I Used a Do-It-Yourself (DIY) Online or Installed Tax Software Program (Not Through IRS Free File)

What were the main reasons why you chose to use a Do-It-Yourself (DIY) tax software program (not IRS Free File)? (Choose up to five responses.)

- I've used this method before
- This method is a lower cost than other methods
- It's easy for me to use this method
- This method has better accuracy than other methods
- This method is faster to prepare the tax return than other methods
- I'm less likely to get audited using this method
- This method gets me my refund faster
- This method provides many payment options
- This method is more secure than other methods
- This method makes it easy for me to get every possible deduction and credit I qualify for
- It's easy for me to get help or customer support if I needed help with this method
- This method was recommended to me by someone whose opinion I trust
- This method allows me to retain information from my previous year's return

What is the main reason you chose to use a Do-It-Yourself (DIY) tax software program to prepare your return?

- I've always prepared my own taxes
- I have confidence I can prepare my tax return myself
- I like the interview-question format of software programs
- It's a low-cost way to file taxes
- Other (please specify):

Have you always used the brand of software or online program you currently use to prepare (fill out) your tax forms?

- Yes
- No

Why did you choose the software program you currently use?

- Name recognition (it's a popular brand)
- I've used this software program before
- I can use this software program to prepare my taxes for free
- This software program involves a lower cost than other software programs
- This software program is easier for me to use than other software programs
- This software program has better accuracy than other software programs
- The software programs is faster to complete compared to other software programs

- The software programs gets me my refund faster than other software programs
- This software program allows me to use my preferred payment options (if taxes are owed)
- This software program is more secure than other software programs
- I'm less likely to get audited if I use this software program
- This software program allows me to easily file my state returns with my federal returns
- It was easy for me to get help or customer support if I needed help filing my returns with this software program
- This software program makes it easy for me to find every possible deduction and credit I can qualify for
- This software program was recommended by someone I trust
- This software program allows me to use retained information from my previous returns
- Other reasons (please specify):

Did you pay for your program or was it free?

- I paid for it
- It was free

Did you use this software program to electronically file (submit) your tax return to the IRS or did you print and mail your tax return forms to the IRS?

- I filed electronically
- I printed it out and mailed it in

If "I filed electronically" add this question:

If you filed (submitted) your returns to the IRS electronically, did you pay for submitting your taxes electronically?

- Yes, I paid extra to e-file
- No, it was included in the cost of the software/online program
- No, it was all free
- I don't know

If "I printed it out and mailed it in" add this question:

If you prepared (filled out) your tax forms using a tax software program but filed (submitted) your tax returns by printing out your tax forms and mailing it to the IRS, why did you choose to do that instead of filing electronically?

- I wanted to e-file, but experienced technical difficulties with electronically filing (rejection by the IRS, or some other reason that I was unable to e-file)
- I prefer to print the electronic forms and file to the IRS by paper

- In general, I find filing by paper to be more secure in terms of protecting my information
- I don't trust the software program to protect my information that is submitted online
- Filing electronically involved additional filing costs
- N/A

[Return to survey for all DIY filers]

Please indicate any "extras" (like "audit protection" or "advance refund") from your software package.

Received

- Audit protection
- Identity theft protection
- Access to customer service
- Gift card
- Advance refund
- Other (please specify):
- Did not receive any extras

To what extent did being able to receive the extra(s) influence your decision to use a do-it-yourself software program?

- To an extremely small extent
- To a small extent
- To a moderate extent
- To a large extent
- To an extremely large extent

Have you used any other method to file taxes within the past 10 years?

- No, I've always used a software or online DIY program to file my taxes
- Yes, I used IRS Free File within the past 10 years
- Yes, I used an IRS Volunteer Income Tax Assistance site within the past 10 years
- Yes, I used a paid preparer within the past 10 years
- Yes, I prepared and filed a paper return within the past 10 years

If "Yes, I used Free File" add the following question:

Why did you switch to a DIY program?

- I became ineligible
- My software provider offered free tax filing outside of IRS Free File
- I no longer want to go through IRS.gov to file my taxes
- Other (state reason):

If “Yes, I used VITA” add the following question:

Why did you switch to a DIY program?

- I became ineligible
- It became inconvenient to visit the site
- I decided I could prepare my tax return myself
- Other (state reason):

If “Yes, I used a paid preparer” add the following question:

Why did you switch to a DIY program?

- It became too expensive
- I decided I could prepare my tax return myself
- Other (state reason):

If “Yes, I prepared and filed on paper” add the following question:

Why did you switch to a DIY program?

- Electronic methods were easier
- My return became too complex to complete on paper
- Other (state reason):

[Return to survey for all DIY filers]

Thinking about other ways to file your taxes, please rate the likelihood that you would ever use a Paid Preparer.

- Not at all likely
- Slightly likely
- Moderately likely
- Very likely
- Extremely likely

Please select the statement below that would most apply to your rating about a Paid Preparer.

- I would probably choose this method if my taxes became too complicated for me to do them myself
- I would probably choose this method if I decided I no longer have the time or prefer not to spend time doing my taxes
- I would probably choose this method for some other reason (please specify):
- I would probably not choose this method because it's too expensive

- I would probably not choose this method because I don't trust my financial information with someone else
- I would probably not choose this method for some other reason (please specify):

Thinking about other ways to file your taxes, please rate the likelihood that you would ever use IRS Free File. *(IRS Free File provides free online tax preparation and filing options on IRS partner sites. IRS partners are online tax preparation companies that develop and deliver this service at no cost to qualifying taxpayers. Taxpayers whose adjusted gross income (or AGI) is \$72,000 or less qualify for IRS Free File partner offers.)*

- Not at all likely
- Slightly likely
- Moderately likely
- Very likely
- Extremely likely

Please select the statement below that would most apply to your rating about IRS Free File.

- I would probably choose this method if I could use the same software program I currently use
- I would probably choose this method if my income dropped and I became eligible
- I would probably choose this method now that I realize I'm currently eligible
- I would probably choose this method if my taxes became less complicated
- I would probably choose this method for some other reason (please specify):
- I would probably not choose this method because I don't want to go through the IRS site
- I would probably not choose this method because I don't trust government programs
- I would probably not choose this method because I don't think I would ever be eligible
- I would probably not choose this method for some other reason (please specify):

Thinking about other ways to file your taxes, please rate the likelihood that you would ever use IRS Volunteer Income Tax Assistance. *(The IRS's Volunteer Income Tax Assistance (VITA) program offer free basic tax return preparation by IRS-trained volunteers to qualified individuals, such as: people who generally make \$57,000 or less, persons with disabilities; and Limited English-speaking taxpayers who need assistance in preparing their own tax returns.)*

- Not at all likely
- Slightly likely
- Moderately likely
- Very likely
- Extremely likely

Please select the statement below that would most apply to your rating about IRS Volunteer Income Tax Assistance.

- I would probably choose this method if there was a VITA site convenient to me
- I would probably choose this method if my income dropped and I became eligible
- I would probably choose this method now that I realize I'm currently eligible
- I would probably choose this method for some other reason (please specify):
- I would probably not choose this method because I don't think I need help filling out my tax return
- I would probably not choose this method because I don't think volunteer tax preparers are good at their job
- I would probably not choose this program because I don't think volunteer tax preparers have the same motivation to help me as paid preparers
- I would probably not choose this program because I don't want to travel to a different location to prepare and file my taxes
- I would probably not choose this method for some other reason (please specify):

Thinking about other ways to file your taxes, please rate the likelihood that you would ever fill out a paper tax form and mail it to the IRS.

- Not at all likely
- Slightly likely
- Moderately likely
- Very likely
- Extremely likely

Please select the statement below that would most apply to your rating about filling out a paper tax form and mailing it to the IRS

- I would probably use this method. Specify reason:
- I would probably not use this method. Specify reason:

Do you think there might be circumstances that would cause you to switch your filing method?

- No, I believe I will always use this method to file my taxes
- Yes, I can see myself switching if the circumstances were right

[Next screen – To Section C for all participants]

Section B4: If "I filled out a paper form"

I Filled Out A Paper Form

What were the main reasons why you chose to fill out a paper form? (Choose up to five responses.)

- I've used this method before
- This method is a lower cost than other methods
- It's easy for me to use this method
- This method has better accuracy than other methods
- This method is faster to prepare the tax return than other methods
- I'm less likely to get audited using this method
- This method gets me my refund faster
- This method provides many payment options
- This method is more secure than other methods
- This method makes it easy for me to get every possible deduction and credit I qualify for
- It's easy for me to get help or customer support if I needed help with this method
- This method was recommended to me by someone whose opinion I trust
- This method allows me to retain information from my previous year's return

Why do you choose to fill out a paper form?

- I prefer filling out a paper form over using software
- I don't like sharing my financial information online
- I don't have access to a computer or high speed internet
- Other (please specify):

Have you used any other method to file taxes within the past ten years?

- No, I've always filled out a paper form to file my taxes
- Yes, I used IRS Free File within the past 10 years
- Yes, I used an IRS Volunteer Income Tax Assistance site within the past 10 years
- Yes, I used a paid preparer within the past 10 years
- Yes, I used a do-it-yourself software or online program within the past 10 years

If "Yes, I used Free File" add the following question:

Why did you switch to filling out a paper form?

- I became ineligible
- I no longer wanted to use my computer to file my taxes
- I no longer want to go through IRS.gov to file my taxes
- Other (state reason):

If “Yes, I used VITA” add the following question:

Why did you switch to filling out a paper form?

- I became ineligible
- It became inconvenient to visit the site
- I decided I could prepare my return myself
- Other (state reason):

If “Yes, I used a paid preparer” add the following question:

Why did you switch to filling out a paper form?

- It became too expensive
- I decided I could prepare my return myself
- Other (state reason):

If “Yes, I use a do-it-yourself software or online program” add the following question:

Why did you switch to filling out a paper form?

- I no longer wanted to use my computer to complete my return
- Other (state reason):

[Return to survey for all paper filers]

Thinking about other ways to file your taxes, please rate the likelihood that you would ever use a do-it-yourself software or online program.

- Not at all likely
- Slightly likely
- Moderately likely
- Very likely
- Extremely likely

Please select the statement below that would most apply to your rating about do-it-yourself software or online program.

- I would probably choose this method because I think it would be easiest
- I would probably choose this method if my taxes became less complicated
- I would probably choose this method because it would be less costly
- I would probably choose this method for some other reason (please specify):
- I would probably not choose this method because I prefer someone else to do my taxes
- I would probably not choose this method for some other reason (please specify):

Thinking about other ways to file your taxes, please rate the likelihood that you would ever use a Paid Preparer.

- Not at all likely
- Slightly likely
- Moderately likely
- Very likely
- Extremely likely

Please select the statement below that would most apply to your rating about a Paid Preparer.

- I would probably choose this method if my taxes became too complicated for me to do them myself
- I would probably choose this method if I decided I no longer have the time or prefer not to spend time doing my taxes
- I would probably choose this method for some other reason (please specify):
- I would probably not choose this method because it's too expensive
- I would probably not choose this method because I don't trust my financial information with someone else
- I would probably not choose this method for some other reason (please specify):

Thinking about other ways to file your taxes, please rate the likelihood that you would ever use IRS Free File. *(IRS Free File provides free online tax preparation and filing options on IRS partner sites. IRS partners are online tax preparation companies that develop and deliver this service at no cost to qualifying taxpayers. Taxpayers whose adjusted gross income (or AGI) is \$72,000 or less qualify for IRS Free File partner offers.)*

- Not at all likely
- Slightly likely
- Moderately likely
- Very likely
- Extremely likely

Please select the statement below that would most apply to your rating about IRS Free File.

- I would probably choose this method if I could use the same software program I currently use
- I would probably choose this method if my income dropped and I became eligible
- I would probably choose this method now that I realize I'm currently eligible
- I would probably choose this method if my taxes became less complicated
- I would probably choose this method for some other reason (please specify):
- I would probably not choose this method because I don't want to go through the IRS site
- I would probably not choose this method because I don't trust government programs

- I would probably not choose this method because I don't think I would ever be eligible
- I would probably not choose this method for some other reason (please specify):

Thinking about other ways to file your taxes, please rate the likelihood that you would ever use IRS Volunteer Income Tax Assistance. *(The IRS's Volunteer Income Tax Assistance (VITA) program offer free basic tax return preparation by IRS-trained volunteers to qualified individuals, such as: people who generally make \$57,000 or less, persons with disabilities; and Limited English-speaking taxpayers who need assistance in preparing their own tax returns.)*

- Not at all likely
- Slightly likely
- Moderately likely
- Very likely
- Extremely likely

Please select the statement below that would most apply to your rating about IRS Volunteer Income Tax Assistance.

- I would probably choose this method if there was a VITA site convenient to me
- I would probably choose this method if my income dropped and I became eligible
- I would probably choose this method now that I realize I'm currently eligible
- I would probably choose this method for some other reason (please specify):
- I would probably not choose this method because I don't think I need help filling out my tax return
- I would probably not choose this method because I don't think volunteer tax preparers are good at their job
- I would probably not choose this program because I don't think volunteer tax preparers have the same motivation to help me as paid preparers
- I would probably not choose this program because I don't want to travel to a different location to prepare and file my taxes
- I would probably not choose this method for some other reason (please specify):

Do you think there might be circumstances that would cause you to switch your filing method?

- Yes, I can see myself switching if the circumstances were right
- No, I believe I will always use this method to file my taxes

[Next screen - To Section C for all participants]

Section B5: If “I used a free government program: IRS Volunteer Income Tax Assistance (VITA)”

I Used A Free Government Program: IRS Volunteer Income Tax Assistance Program

What were the main reasons why you chose to use the VITA program? (Choose up to five responses.)

- I've used this method before
- This method is a lower cost than other methods
- It's easy for me to use this method
- This method has better accuracy than other methods
- This method is faster to prepare the tax return than other methods
- I'm less likely to get audited using this method
- This method gets me my refund faster
- This method provides many payment options
- This method is more secure than other methods
- This method makes it easy for me to get every possible deduction and credit I qualify for
- It's easy for me to get help or customer support if I needed help with this method
- This method was recommended to me by someone whose opinion I trust
- This method allows me to retain information from my previous year's return

Why did you choose to use the VITA program?

- I need help doing my taxes and it's free
- It's the easiest way for me to do my taxes
- Other (please specify):

How did you hear about the VITA program?

- I saw the location near me
- I saw an ad or banner in the media or on the internet
- Someone I trust told me about it
- I found it in an internet search for free tax filing
- I found it on IRS.gov
- Other (please specify):

Have you used any other method to file taxes within the past 10 years?

- No, I've always used the VITA program to file my taxes
- Yes, I used IRS Free File within the past 10 years
- Yes, I used a paid preparer within the past 10 years
- Yes, I prepared and filed a paper return within the past 10 years
- Yes, I used a do-it-yourself software or online program within the past 10 years

If “Yes, I used Free File” add the following question:

Why did you switch to the VITA program?

- My return became too complex to complete myself
- I no longer had the time or desired to spend the time completing my return myself
- I no longer want to go through IRS.gov to file my taxes
- Other (state reason):

If “Yes, I used a paid preparer” add the following question:

Why did you switch to the VITA program?

- It became too expensive
- Other (state reason):

If “Yes, I prepared and filed a paper return” add the following question:

Why did you switch to the VITA program?

- Electronic methods were easier
- My return became too complex to complete myself
- I no longer had the time or desired to spend the time completing my return myself
- Other (state reason):

If “Yes, I use a do-it-yourself software or online program” add the following question:

Why did you switch to the VITA program?

- My return became too complex to complete myself
- I no longer had the time or desired to spend the time completing my return myself
- Other (state reason):

[Return to survey for all VITA filers]

Thinking about other ways to file your taxes, please rate the likelihood that you would ever use a do-it-yourself software or online program.

- Not at all likely
- Slightly likely
- Moderately likely
- Very likely
- Extremely likely

Please select the statement below that would most apply to your rating about do-it-yourself software or online program.

- I would probably choose this method because I think it would be easiest
- I would probably choose this method if my taxes became less complicated
- I would probably choose this method because it would be less costly
- I would probably choose this method for some other reason (please specify):
- I would probably not choose this method because I prefer someone else to do my taxes
- I would probably not choose this method for some other reason (please specify):

Thinking about other ways to file your taxes, please rate the likelihood that you would ever use a Paid Preparer.

- Not at all likely
- Slightly likely
- Moderately likely
- Very likely
- Extremely likely

Please select the statement below that would most apply to your rating about a Paid Preparer.

- I would probably choose this method if my taxes became too complicated for me to do them myself
- I would probably choose this method if I decided I no longer have the time or prefer not to spend time doing my taxes
- I would probably choose this method for some other reason (please specify):
- I would probably not choose this method because it's too expensive
- I would probably not choose this method because I don't trust my financial information with someone else
- I would probably not choose this method for some other reason (please specify):

Thinking about other ways to file your taxes, please rate the likelihood that you would ever use IRS Free File. (*IRS Free File provides free online tax preparation and filing options on IRS partner sites. IRS partners are online tax preparation companies that develop and deliver this service at no cost to qualifying taxpayers. Taxpayers whose adjusted gross income (or AGI) is \$72,000 or less qualify for IRS Free File partner offers.*)

- Not at all likely
- Slightly likely
- Moderately likely
- Very likely
- Extremely likely

Please select the statement below that would most apply to your rating about IRS Free File.

- I would probably choose this method if I could use the same software program I currently use
- I would probably choose this method if my income dropped and I became eligible
- I would probably choose this method now that I realize I'm currently eligible
- I would probably choose this method if my taxes became less complicated
- I would probably choose this method for some other reason (please specify):
- I would probably not choose this method because I don't want to go through the IRS site
- I would probably not choose this method because I don't trust government programs
- I would probably not choose this method because I don't think I would ever be eligible
- I would probably not choose this method for some other reason (please specify):

Thinking about other ways to file your taxes, please rate the likelihood that you would ever fill out a paper tax form and mail it to the IRS.

- Not at all likely
- Slightly likely
- Moderately likely
- Very likely
- Extremely likely

Please select the statement below that would most apply to your rating about filling out a paper tax form and mailing it to the IRS

- I would probably use this method (specify reason):
- I would probably not use this method (specify reason):

Do you think there might be circumstances that would cause you to switch your filing method?

- Yes, I can see myself switching if the circumstances were right
- No, I believe I will always use this method to file my taxes

Section C - For all Participants

Considerations for Choosing Your Method of Tax Filing

How would you rate the importance of the following factors when considering how you file your tax returns? *Not at all important, Slightly important, Moderately important, Very important, Extremely important*

- Previous experience using the same method
- Total Cost of filing
- Ease of use/level of effort required
- How long it takes to complete the process
- How fast I get my refund
- Availability of a preferred payment option if I owe
- Security (in terms of protecting my data)
- Fear of an audit
- Options for filing my state return
- Finding every possible deduction and credit
- Availability of help or customer service
- Availability of "extras" (such as "audit protection" or "advance refund")
- The complexity of my tax return
- Retention of information from previous year
- Other factor not mentioned:
- Other factor not mentioned:

How much are you willing to pay for products or services to help you file your taxes?

- I'm not willing to pay any money to file my taxes
- \$50 or less
- \$51-\$100
- \$101-\$300
- More than \$300

How would you rate the complexity of preparing and filing a tax return in general?

- Not complex
- Slightly complex
- Moderately complex
- Very complex
- Extremely complex

How would you rate your understanding of your own tax situation?

- A low level of understanding

- Slightly high level of understanding
- Moderately level of understanding
- Very high level of understanding
- Extremely high level of understanding

On a scale of one to five, with one being not very complex and five being very complex, how would you rate the complexity of your tax return?

- Not complex
- Slightly complex
- Moderately complex
- Very complex
- Extremely complex

On a scale of one to five, with one being not satisfied at all and five being very satisfied, how would you rate your satisfaction level with your filing method?

- Not at all satisfied
- Slightly satisfied
- Moderately satisfied
- Very satisfied
- Extremely satisfied

If the government offered a program where you didn't have to file a tax return and the IRS would determine the tax you owed or the refund you received, would you participate?

- Yes
- Maybe
- No

If "No" add the following question:

If no, why not?

- I don't trust the government to represent my best interest
- I don't trust the government to get my tax return right
- The government wouldn't have all of the information they need to file my return
- I like filing my taxes myself
- Other (please specify):

[Return to Survey for all]

What do you do when you need help with a tax question?

- I search online for an answer
- I call someone I trust will know the answer
- I call the IRS
- I go to IRS.gov
- I call my tax preparer
- I use my tax software program's customer service

[Next]

Section D: Information About Me - For all participants

Gender

- Female
- Male
- Other
- Prefer not to respond

Age (years)

- Under 25
- 25 to 34
- 35 to 44
- 45 to 54
- 55 to 64
- 65 and Over
- Prefer not to respond

Highest degree or level of school completed

- Some school but did not complete high school
- Received High School Diploma, GED, or alternative credential for high school graduation
- Associate Degree
- Bachelor's Degree
- Master's Degree or Higher
- Prefer not to respond

Are you the primary party in your household responsible for filing taxes?

- Yes
- No
- I share responsibility equally
- Prefer not to respond\

How many years have you been filing a tax return?

- Less than 5 years
- 5 - 10 years
- More than 10 years
- Not sure
- Prefer not to respond

What was your approximate household adjusted gross income (AGI) for your last return?

- \$0 to \$17,000
- \$17,001 to \$25,000
- \$25,001 to \$35,000
- \$35,001 to \$50,000
- \$50,001 to \$75,000
- \$75,001 to \$100,000
- \$100,001 or more
- Not sure
- Prefer not to respond

What was your filing status in your last tax return?

- Single
- Married Filing Joint
- Married Filing Separate
- Head of Household
- Widow(er) with Children
- Married Filing Separate and Spouse not Required to File
- Not sure
- Prefer not to respond

After filing your last tax return, did you:

- Receive a refund from the IRS
- Owe a balance to the IRS
- Come out even on your tax balance
- Not sure
- Prefer not to respond

What type of income do you generally report on your taxes?

- Wages from a job, retirement income or interest income
- Business or self-employed
- Both
- Not sure
- Prefer not to respond

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