

## **Attachments**

4 Surveys

1 Example of Survey Communication Pieces (Tax Preparer)

Survey Pre-Notification Letter

Survey First Notification Letter

Reminder Letter

# Customer Satisfaction Survey for External Customers of Media and Publications Division: 2016 Business Taxpayer Survey

## Introduction

Welcome to the IRS Media & Publications Division customer satisfaction survey. Fors Marsh Group LLC, an independent research organization, is working with the IRS to obtain your feedback as a business taxpayer about the forms, publications, and instructions that your business uses to prepare and file their federal income tax returns. This feedback will be used to improve IRS materials such as forms, publications, and instructions.

This survey should take no longer than 15 minutes.

To verify the authenticity of this survey, please visit [IRS.gov](http://IRS.gov) and enter the search term 'customer surveys'. The IRS Customer Satisfaction Survey page contains a list of valid and current IRS surveys and, as of this issuance, should provide a reference to the *W&I: CARE: M&P: Business Taxpayers* customer satisfaction survey.

You may also contact Patty Wagner at the IRS via phone at 240-613-5680 or by email at [patty.wagner@irs.gov](mailto:patty.wagner@irs.gov) as an alternative to verify sponsorship of the survey.

Thank you in advance for your participation in this important survey.

## Confidentiality and Security

Fors Marsh Group will hold your identity as anonymous as allowed by law and will only provide results to the IRS after combining them with other responses. In addition, Fors Marsh Group will provide the raw data to the IRS with all personally identifiable information removed. Please feel confident that your answers will be used solely for the purpose stated above.

### **Paperwork Reduction Act Notice**

*The Paperwork Reduction Act requires that the IRS provide an OMB control number relating to all public information requests along with the address where you can send comments regarding the survey. The OMB number for this survey is 1545-2250. If you have any comments regarding this survey, please write to: IRS, Special Services Section, SE:W:CAR:MP:T:M:S, Room 6129, 1111 Constitution Avenue, NW, Washington, DC 20224.*

### **Privacy Statement**

*The authority requesting the information is 5 USC 301. The primary purpose of asking for the information is to determine steps the IRS can take to improve our service to you. The information may be disclosed as authorized by the routine uses published for the Privacy Act System of Records entitled, *Treas/IRS 00.001 Correspondence Files, including Stakeholder Partnership File, and Correspondence Control Files, as published in the Federal Register: December 10, 2001 (Volume 66, Number 237) [Notices] pages 63785-6. Providing the information is voluntary. Not answering some or all of the questions will not affect you.**

1

Did your business file a 2015 federal income tax return?

- 1 Yes
- 2 No
- 3 Filed an extension for 2015 tax return
- 4 Not sure

Continue with survey

Please answer only this item and return the survey in the envelope provided

2

Who prepared your business's 2015 federal tax return? (Please select one)

- 1 You
- 2 Someone else in your business
- 3 Professional tax preparer (includes accountant, CPA, enrolled agent, or other tax preparer)
- 4 Someone else outside your business
- 5 Not sure

Continue with survey

Please answer only this item and return the survey in the envelope provided

### OVERALL RATING

3

Overall, how would you rate the IRS on tax forms, instructions, publications, and other tax products that it develops, produces, and distributes to taxpayers?

- 1 Very Dissatisfied
- 2 Dissatisfied
- 3 Neither Satisfied nor Dissatisfied
- 4 Satisfied
- 5 Very Satisfied

### PREPARATION AND FILING

4

How many years have you been in business?

  Years

5

Please rate your satisfaction with each of the following tax forms you used for your 2015 business federal income tax return.

- A. 1120 for a Corporation
- B. 1120S for an S Corp
- C. 1065 for a Partnership
- D. 1040 Schedule C for an Individual
- E. 1040 Schedule C-EZ for an Individual
- F. 1040 Schedule E for an Individual
- G. 1040 Schedule F for an Individual
- H. 8941 - Credit for Small Employer Health Insurance Premiums
- I. Other (Please specify)

	Very Dissatisfied	Dissatisfied	Neither Satisfied Nor Dissatisfied	Satisfied	Very Satisfied	Not Applicable/ Did Not Use
A. 1120 for a Corporation	1	2	3	4	5	NA
B. 1120S for an S Corp	1	2	3	4	5	NA
C. 1065 for a Partnership	1	2	3	4	5	NA
D. 1040 Schedule C for an Individual	1	2	3	4	5	NA
E. 1040 Schedule C-EZ for an Individual	1	2	3	4	5	NA
F. 1040 Schedule E for an Individual	1	2	3	4	5	NA
G. 1040 Schedule F for an Individual	1	2	3	4	5	NA
H. 8941 - Credit for Small Employer Health Insurance Premiums	1	2	3	4	5	NA
I. Other (Please specify)	1	2	3	4	5	NA

6

How did you or someone else in your business prepare your business income tax return?

- 1 Prepared return using paper IRS tax forms
- 2 Prepared return using software (electronically)
- 3 Not sure

# TAX FORMS, INSTRUCTIONS, AND PUBLICATIONS

**7** Did you get ANY tax forms, instructions, or publications for your 2015 federal tax returns from the following sources?

- A. IRS office
- B. IRS website (www.irs.gov)
- C. Other website
- D. Tax preparation software or computer program
- E. Office supply store
- F. Other (Please specify)

Yes	No
1	2
1	2
1	2
1	2
1	2
1	2

**8** Did you use the electronic version of any federal tax form on the IRS website to complete your 2015 tax returns?

- ① Yes, I filled out an electronic tax form on the IRS website
- ② Yes, I printed out a federal tax form from the IRS website and filled it out
- ③ No, I did not use an electronic version of any federal tax form

If yes, which electronic tax form(s) did you use?

**9** In thinking about the 2015 tax forms, instructions, and publications you used, please rate your satisfaction with each of the following items:

- A. Knowing where to find tax forms and instructions
- B. The ease of getting tax forms and instructions
- C. The ease of determining which forms and instructions you needed
- D. The ease of understanding the forms
- E. Knowing what you needed to do to complete the forms
- F. The ease of understanding the instructions for the form
- G. The completeness of instructions
- H. The ease of understanding the publications
- I. The completeness of the publications
- J. The ease of finding answers in the publications

Very Dissatisfied	Dissatisfied	Neither Satisfied Nor Dissatisfied	Satisfied	Very Satisfied
1	2	3	4	5
1	2	3	4	5
1	2	3	4	5
1	2	3	4	5
1	2	3	4	5
1	2	3	4	5
1	2	3	4	5
1	2	3	4	5
1	2	3	4	5
1	2	3	4	5

## PUBLICATIONS

**10** For those publications that you did use, in either printed or electronic format, please rate your satisfaction.

- A. Pub 15 - *Circular E, Employer's Tax Guide*
- B. Pub 17 - *Your Federal Income Tax*
- C. Pub 535 - *Business Expenses*
- D. Pub 946 - *How To Depreciate Property*

Very Dissatisfied	Dissatisfied	Neither Satisfied Nor Dissatisfied	Satisfied	Very Satisfied	N/A / Did Not Use
1	2	3	4	5	NA
1	2	3	4	5	NA
1	2	3	4	5	NA
1	2	3	4	5	NA

11

If you did NOT use Publication 17 to assist you in the preparation of your 2015 federal tax return, how did you get tax information to prepare your 2015 tax return?

(Select all that apply)

- ① Used topic-specific publication
- ② Tax software
- ③ Online research
- ④ Other (Please specify)

Empty text box for specifying other information.

12

If you DID use Publication 17 to assist in the preparation of your 2015 federal tax return, what format(s) for Publication 17 did you use? (Select all that apply)

- ① PDF
- ② HTML (online)
- ③ eBook
- ④ Printed
- ⑤ Purchased from the Government Printing Office
- ⑥ Other (Please specify)

Empty text box for specifying other information.

13

We would like to know which publications you used most often to assist in the preparation of your 2015 tax return. Of the publications below, check the one you used most often. Next, check the one that you used 2nd most often. Please check only one choice in each row.

	Pub 15	Pub 17	Pub 535	Pub 946	Other	Not Applicable/ Did Not Use
A. Used Most Often	①	②	③	④	⑤	NA
B. Used 2nd Most Often	①	②	③	④	⑤	NA

If 'Not Applicable/Did Not Use' for both Question 13A and 13B, Skip to Question 18

14

Please indicate whether each of the statements below describes how you found out about the publication you used most often.

	Yes	No
A. Tax form instructions referred me to it	①	②
B. List of publications in instructions	①	②
C. IRS website (www.irs.gov)	①	②
D. From filing tax returns in previous years	①	②
E. IRS mailed it to me	①	②
F. From my tax preparer	①	②
G. Other (Please specify)	①	②

Empty text box for specifying other information.

15

For the publication you used most often, how would you rate each of the following aspects?

	Very Poor	Poor	Neutral	Good	Very Good	Not Applicable/ Did Not Use
A. Table of contents	①	②	③	④	⑤	NA
B. Important changes	①	②	③	④	⑤	NA
C. Index at back	①	②	③	④	⑤	NA
D. Worksheet(s)	①	②	③	④	⑤	NA
E. Examples	①	②	③	④	⑤	NA
F. Flow-charts	①	②	③	④	⑤	NA
G. Appendix	①	②	③	④	⑤	NA
H. Tax tables	①	②	③	④	⑤	NA
I. Tips	①	②	③	④	⑤	NA
J. Links within documents	①	②	③	④	⑤	NA

16

In thinking about your experience with the publication you used **most often**, to what extent do you agree or disagree with the following statements?

- A. The language was understandable
- B. The graphics and layout made it easy to follow
- C. The size of the print made it easy to read
- D. It was easy to find the information that I was looking for
- E. It was easy to go back and forth between the publication and the instructions
- F. The section headings were useful
- G. The publication was as clear as possible, given the tax law
- H. The forms made it easy to make accurate calculations
- I. The worksheet(s) helped me complete the forms

Strongly Disagree	Disagree	Neither Agree Nor Disagree	Agree	Strongly Agree	Not Applicable/ Did Not Use
1	2	3	4	5	NA
1	2	3	4	5	NA
1	2	3	4	5	NA
1	2	3	4	5	NA
1	2	3	4	5	NA
1	2	3	4	5	NA
1	2	3	4	5	NA
1	2	3	4	5	NA
1	2	3	4	5	NA

17

How could the publication you used **most often** be improved?

### IRS WEBSITE

18

Approximately how many times did you access the IRS website to get tax forms, instructions, or publications while preparing your 2015 tax return?

- 1 Never
- 2 Once
- 3 2 - 5 times
- 4 6 - 10 times
- 5 More than 10 times

Skip to Question 24

Continue with survey

19

Were you able to find the tax forms, instructions, or publications you needed on the IRS website?

- 1 Yes
- 2 No

20

Did you use the IRS website to do any of the following while preparing your 2015 tax return?

- A. Access a specific form
- B. Access a specific publication
- C. Access instructions
- D. Get an answer to a tax question
- E. See what changes had been made in tax laws
- F. Find out how to get help with preparing your return
- G. Other (Please specify):

Yes	No
1	2
1	2
1	2
1	2
1	2
1	2
1	2

**21** What version of tax forms, instructions, and publications do you feel is most beneficial?

- ① HTML (online)
- ② PDF
- ③ eBook

**22** How would you rate your overall satisfaction with accessing tax forms, instructions, and publications from the IRS website?

- A. Tax forms
- B. Instructions
- C. Publications

Very Dissatisfied	Dissatisfied	Neither Satisfied Nor Dissatisfied	Satisfied	Very Satisfied
①	②	③	④	⑤
①	②	③	④	⑤
①	②	③	④	⑤

**23** What did you like/dislike about the IRS website's format? (Please explain why)

**25** Which Spanish language tax forms, instructions, or publications did you use to complete your 2015 tax returns?

**24** Did you use any Spanish language tax forms, instructions, or publications to complete your 2015 tax returns?

- ① Yes
- ② No Skip to Question 26

**26** Do you need tax products in languages other than English or Spanish? If so, please specify which language(s).

- ① Yes (Please specify)
- ② No

## MARKETING

**27** How would you prefer to receive communications about changes to tax forms, instructions, and publications from the IRS? (Select only one response)

- ① Mail
- ② IRS website (www.irs.gov)
- ③ Email
- ④ Twitter
- ⑤ Other (Please specify):

- ⑥ I don't know

28

Are you aware that the IRS has created tax publications in eBook format?

- ① Yes – I used one or more to help prepare my business's 2015 tax return
- ② Yes – I am aware of the eBooks but did not use them
- ③ No

29

Have you used your mobile device or tablet to access any of the following IRS tax products?

- A. Tax forms
- B. Instructions
- C. Publications

Yes	No
①	②
①	②
①	②

If NO to all, Skip to Question 31

30

What mobile device have you used to read IRS products and information?

- A. Smart Phone
- B. Tablet
- C. eBook Reader

Yes	No
①	②
①	②
①	②

31

Have you used your mobile device to scan the QR Code on the back of any IRS publications?

- ① Yes
- ② No

32

If more tax products were made available for use on mobile devices, how likely would you be to use them?

Very Unlikely	Unlikely	Neither Likely Nor Unlikely	Likely	Very Likely
①	②	③	④	⑤

The IRS Media & Publications Division and Fors Marsh Group thank you very much for your time and feedback. If you have any questions about this survey, please contact the survey processing center at 1-800-521-7177, or email [irssurveyhelp@forsmarshgroup.com](mailto:irssurveyhelp@forsmarshgroup.com).



# Customer Satisfaction Survey for External Customers of Media and Publications Division

## 2016 Individual Taxpayer Survey

### Introduction

Fors Marsh Group LLC is an independent research organization working with the IRS to obtain feedback on customer satisfaction. If you are an adult who deals with your household taxes, we invite you to take part in a brief voluntary survey about your satisfaction with some of the products and services the IRS offers for tax return preparation. The survey should take about 15 minutes to complete. Fors Marsh Group will not provide any identifying information to the IRS along with your responses and will hold your identity private to the extent permitted by law. We will not ask you about the details of your tax return itself. Your participation is very important to help the IRS design products and services that meet the needs of taxpayers.

To verify the authenticity of this survey, please visit IRS.gov and enter the search term 'customer surveys'. The IRS Customer Satisfaction Survey page contains a list of valid and current IRS surveys and, as of this issuance, should provide a reference to the *W&I: CARE: M&P: Individual Taxpayer* customer satisfaction survey.

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The authority requesting the information is 5 USC 301. The primary purpose of asking for the information is to determine steps the IRS can take to improve our services to you. The information may be disclosed as authorized by the routine uses published for the Privacy Act System of Records entitled, *Treas/IRS 00.001 Correspondence Files, including Stakeholder Partnership File, and Correspondence Control Files*, as published in the *Federal Register: December 10, 2001 (Volume 66, Number 237) [Notices] pages 63785-6*. Providing the information is voluntary. Not answering some or all of the questions will not affect you.

#### 1 Have you filed a federal income tax return for 2015?

- ① Yes. You or your spouse has filed a federal income tax return for 2015.
- ② No. Have not yet filed a federal income tax return for 2015.
- ③ No. Do not have to file a federal income tax return for 2015.

Continue with survey

Please answer only this item and return the survey in the envelope provided

#### 2 Who prepared your 2015 federal income tax return?

- ① You or another family member in your household.
- ② Someone else outside your household (e.g., a paid preparer, an accountant, a tax service, or a volunteer).
- ③ I don't know/remember

Continue with survey

Please answer only this item and return the survey in the envelope provided

3

Are you familiar enough with your federal income tax return for 2015 to answer some questions about it?

- ① Yes
- ② No
- ③ I don't know/remember

Continue with survey  
Please answer only this item and return  
the survey in the envelope provided

## OVERALL RATING

4

Overall, how would you rate the IRS on tax forms, instructions, publications, and other tax products that it develops, produces, and distributes to taxpayers?

- ① Very dissatisfied
- ② Dissatisfied
- ③ Neither satisfied nor dissatisfied
- ④ Satisfied
- ⑤ Very satisfied

## PREPARATION/FILING

5

How did you prepare your 2015 federal income tax return?

- ① Using tax preparation software (electronically)
- ② By hand, using IRS tax forms
- ③ I don't know/remember

Continue to Question 6

Skip to Question 7

6

Please indicate which of the following best describes how you viewed actual IRS tax forms while using tax preparation software.

- ① I looked at the actual IRS form when determining what to enter as input to my software program.
- ② The first time I saw the actual form was after I finished and printed or viewed my completed form.
- ③ I never looked at a hard copy or PDF of the IRS form. I relied completely on the software interface to complete and submit my return.
- ④ I did not view any IRS tax forms online.
- ⑤ Other (Please describe when and how you used the IRS form)

7

Which of the following tax forms did you use for your 2015 tax return?

- ① Long Form 1040 U.S. Individual Income Tax Return
- ② Short Form 1040A U.S. Individual Income Tax Return
- ③ 1040EZ Income Tax Return for Single Filers and Joint Filers with No Dependents
- ④ I don't know/remember

Continue to Question 8

Skip to Question 11

# FORMS EVALUATION

**8** Please rate your satisfaction with each of the following schedules and tax forms that you used.

	Very Dissatisfied	Dissatisfied	Neither Satisfied Nor Dissatisfied	Satisfied	Very Satisfied	Not Applicable/ Did Not Use
A. Schedule A for Itemized Deductions	1	2	3	4	5	NA
B. Schedule B for Interest and Ordinary Dividends	1	2	3	4	5	NA
C. Schedule C for Small Business Income	1	2	3	4	5	NA
D. Schedule D for Capital Gains and Losses	1	2	3	4	5	NA
E. Schedule E for Supplemental Income and Loss	1	2	3	4	5	NA
F. Schedule EIC for Earned Income Credit	1	2	3	4	5	NA
G. Form 4562 Depreciations and Amortization	1	2	3	4	5	NA
H. Form 8863 for Education Credits (American Opportunity and Lifetime Learning Credits)	1	2	3	4	5	NA
I. Form 8941 Credit for Small Employer Health Insurance Premiums	1	2	3	4	5	NA
J. Form 8949 Sales and Other Dispositions of Capital Assets	1	2	3	4	5	NA
K. Form 8962 Premium Tax Credit (PTC)	1	2	3	4	5	NA
L. Form 8965 Health Coverage Exemptions	1	2	3	4	5	NA
M. Other (Please specify)	1	2	3	4	5	NA

**9** Thinking about the tax forms, publications, and instructions that you used to complete your 2015 tax return, please rate your satisfaction with the following.

	Very Dissatisfied	Dissatisfied	Neither Satisfied Nor Dissatisfied	Satisfied	Very Satisfied	Not Applicable/ Did Not Use
A. Knowing where to find tax forms and instructions	1	2	3	4	5	NA
B. The ease of getting tax forms and instructions	1	2	3	4	5	NA
C. The ease of determining which forms and instructions you needed	1	2	3	4	5	NA
D. The ease of understanding tax forms	1	2	3	4	5	NA
E. Knowing what you needed to do to complete the forms	1	2	3	4	5	NA
F. The completeness of instructions	1	2	3	4	5	NA
G. The ease of understanding the instructions	1	2	3	4	5	NA
H. The ease of finding answers in the publications	1	2	3	4	5	NA

**10** For those statements that you marked 'Very Dissatisfied' or 'Dissatisfied', please explain why.

# PUBLICATION EVALUATION

For the following set of questions, please think about the tax publications you used to assist in the preparation of your 2015 individual federal income tax return.

**11** Did you use any IRS publications to assist in the preparation of your 2015 federal income tax return?

1 Yes Continue to Question 12  
 2 No Skip to Question 20  
 3 I don't know/remember

12

Please rate your satisfaction with each of the following publications you used to assist in the preparation of your 2015 federal income tax return.

- A. Pub 17 – *Your Federal Income Tax (For Individuals)*
- B. Pub 501 – *Exemptions, Standard Deduction and Filing Information*
- C. Pub 502 – *Medical and Dental Expenses*
- D. Pub 550 – *Investment Income and Expenses*
- E. Pub 590 A – *Contributions to Individual Retirement Arrangements (IRA)*
- F. Pub 590 B – *Distributions from Individual Retirement Arrangements (IRA)*
- G. Pub 596 – *Earned Income Credit*
- H. Pub 970 – *Tax Benefits for Education*
- I. Pub 974 – *The Premium Tax Credit*
- J. Other (Please specify)

Very Dissatisfied	Dissatisfied	Neither Satisfied Nor Dissatisfied	Satisfied	Very Satisfied	Not Applicable/ Did Not Use
1	2	3	4	5	NA
1	2	3	4	5	NA
1	2	3	4	5	NA
1	2	3	4	5	NA
1	2	3	4	5	NA
1	2	3	4	5	NA
1	2	3	4	5	NA
1	2	3	4	5	NA
1	2	3	4	5	NA

13

If you did NOT use Publication 17 to assist in the preparation of your 2015 federal income tax return, how did you get tax information to prepare your 2015 tax return? (Select all that apply)

- 1 Used topic specific publication
- 2 Tax software
- 3 Online research
- 4 Other (Please specify)

14

If you DID use Publication 17 to assist in the preparation of your 2015 federal income tax return, what format(s) for Publication 17 did you use? (Select all that apply)

- 1 PDF
- 2 HTML (online)
- 3 eBook
- 4 Printed
- 5 Purchased from the Government Printing Office
- 6 Other (Please specify)

15

In the 2014 tax year, Publication 590 was split into two publications, one for contributions to IRAs and one for distributions. Was it helpful to split Pub 590 into two separate publications?

- 1 Yes
- 2 No
- 3 Not applicable - did not use Pub 590 in previous year

16

Where did you get the publication(s) that you used for your 2015 federal income tax return? If you obtained these publications from different sources, please tell us all the sources.

- 1 IRS office
- 2 IRS website (www.irs.gov)
- 3 Tax preparation software or computer program
- 4 Other (Please specify)

17

Did you use any Spanish language tax forms, instructions, or publications to complete your 2015 tax returns?

- 1 Yes
- 2 No

Continue to Question 18  
Skip to Question 19

**18** Which Spanish language tax forms, instructions, or publications did you use to complete your 2015 tax returns?

**19** Do you need tax forms, instructions, or publications in languages other than English or Spanish? If so, please specify which language(s).

- ① Yes (Please specify)
- ② No

**WEBSITE AND ELECTRONIC FORMS EVALUATION**

**20** Are you aware that the IRS has created tax publications in eBook format?

- ① Yes – I used one or more to help prepare my 2015 tax return
- ② Yes – I am aware of the eBooks but did not use them
- ③ No

**21** Approximately how many times did you access the IRS website to get tax forms, instructions, or publications to complete your 2015 tax return?

- ① Never Skip to Question 26
- ② Once
- ③ 2-5 times Continue to Question 22
- ④ 6-10 times
- ⑤ More than 10 times

**22** Have you accessed the "Forms & Publication" tab or section on the IRS website?

- ① Yes
- ② No

**23** Were you able to find the tax forms, instructions, or publications you needed on the IRS website?

- ① Yes
- ② No

**24** How would you rate your overall satisfaction with downloading tax forms, instructions, and publications from the IRS website?

- A. Tax forms
- B. Instructions
- C. Publications

	Very Dissatisfied	Dissatisfied	Neither Satisfied Nor Dissatisfied	Satisfied	Very Satisfied	Not Applicable/ Did Not Use
A. Tax forms	①	②	③	④	⑤	NA
B. Instructions	①	②	③	④	⑤	NA
C. Publications	①	②	③	④	⑤	NA

25

What did you like/dislike about the IRS website's format? Please explain why.

Blank area for handwritten response to Question 25.

ELECTRONIC DOCUMENTS

26

Have you ever used an electronic version of any federal tax form on the IRS website?

- 1 Yes Continue to Question 27
2 No
3 I don't know/remember Skip to Question 29

27

What version of tax forms, instructions, and publications do you feel is most beneficial?

- 1 HTML (online)
2 PDF
3 eBook

28

Which of the following electronic tax forms have you completed or used?

- 1 Long Form 1040 U.S. Individual Income Tax Return
2 Short Form 1040A U.S. Individual Income Tax Return
3 1040EZ Income Tax Return for Single Filers and Joint Filers with No Dependents
4 I don't know/remember

29

Have you ever used an electronic version of any federal tax publication on the IRS website?

- 1 Yes Continue to Question 30
2 No
3 I don't know/remember Skip to Question 32

31

Did you experience any problems with the following sections for the online publication(s) that you used?

- A. Table of contents
B. Important changes
C. Index
D. Worksheet
E. Examples
F. Flow charts
G. Appendix
H. Tax tables
I. Links within documents

30

Please mark all of the electronic publications you used to assist in the preparation of your 2015 tax return.

- 1 Pub 17 - Your Federal Income Tax (For Individuals)
2 Pub 501 - Exemptions, Standard Deduction and Filing Information
3 Pub 502 - Medical and Dental Expenses
4 Pub 590 A - Contributions to Individual Retirement Arrangements (IRA)
5 Pub 590 B - Distributions from Individual Retirement Arrangements (IRA)
6 Pub 596 - Earned Income Credit
7 Pub 970 - Tax Benefits for Education
8 Pub 974 - The Premium Tax Credit
9 Other (Please specify)

Blank box for handwritten specification for Question 30, item 9.

Table with 3 columns: Yes, I experienced a problem; No, I did not experience a problem; Not Applicable/Did Not Use. Rows correspond to sections A through I.

**MARKETING**

**32**

Have you used your mobile device or tablet to access any of the following IRS tax products?

- A. Tax forms
- B. Instructions
- C. Publications

Yes	No
1	2
1	2
1	2

If NO to all, Skip to Question 34

**33**

What mobile device have you used to read IRS products and information?

- A. Smart Phone
- B. Tablet
- C. eBook Reader

Yes	No
1	2
1	2
1	2

**34**

Have you used your mobile device to scan the QR Code on the back of any IRS publications?

- 1 Yes
- 2 No

**35**

If more tax products were made available for use on mobile devices, how likely would you be to use them?

- 1 Very unlikely
- 2 Unlikely
- 3 Neither likely nor unlikely
- 4 Likely
- 5 Very likely

**36**

How satisfied are you with getting information on tax law changes for your 2015 tax return?

- 1 Very dissatisfied
- 2 Dissatisfied
- 3 Neither satisfied nor dissatisfied
- 4 Satisfied
- 5 Very satisfied
- 6 Not aware of any tax law changes

Continue to Question 37

Skip to Question 38

**37**

Please indicate whether you found out about changes in tax forms, instructions, or publications through any of the following sources.

- A. Mail
- B. IRS website (www.irs.gov)
- C. Email
- D. Twitter
- E. Other (Please specify)

Yes	No	N/A / I don't know/ remember
1	2	N/A
1	2	N/A
1	2	N/A
1	2	N/A
1	2	N/A

38

How would you prefer to receive communications about changes to tax forms and publications from the IRS? (Select only one response)

- ① Mail
- ② IRS website (www.irs.gov)
- ③ Email
- ④ Twitter
- ⑤ Other (Please specify)
- ⑥ I don't know

39

How satisfied are you with the way the IRS communicates changes in its tax forms, instructions, and publications to its customers?

- ① Very dissatisfied
- ② Dissatisfied
- ③ Neither satisfied nor dissatisfied
- ④ Satisfied
- ⑤ Very satisfied
- ⑥ Not applicable/Have not used/No experience

Continue to Question 40

Skip to Question 41

40

If you were dissatisfied with the way the IRS handles tax law changes in the tax forms, instructions, and publications used when filing, how can the IRS improve your satisfaction?

41

What can the IRS do to improve the tax forms, instructions, and publications that would make preparing and filing your taxes easier?

The IRS Media & Publications Division and Fors Marsh Group LLC, thank you very much for your participation. Your responses will be very helpful for the IRS in better serving taxpayers' needs in the future. If you have any comments or questions, please feel free to contact the survey processing center at 1-800-521-7177, or email us at [irssurveyhelp@forsmarshgroup.com](mailto:irssurveyhelp@forsmarshgroup.com).



# Customer Satisfaction Survey for External Customers of Media and Publications Division: 2016 Tax Preparer Survey

## Introduction

Welcome to the IRS Media & Publications Division customer satisfaction survey. Fors Marsh Group LLC, an independent research organization, is working with the IRS to obtain your feedback as a tax preparer about forms, publications, and instructions that are used to assist customers in understanding, preparing, and filing federal income tax returns.

This survey should take no longer than 15 minutes.

To verify the authenticity of this survey, please visit IRS.gov and enter the search term 'customer surveys'. The IRS Customer Satisfaction Survey page contains a list of valid and current IRS surveys and, as of this issuance, should provide a reference to the *W&I: CARE: M&P: Tax Preparers* customer satisfaction survey.

You may also contact Patty Wagner at the IRS via phone at 240-613-5680 or by email at [patty.wagner@irs.gov](mailto:patty.wagner@irs.gov) as an alternative to verify sponsorship of the survey.

Thank you in advance for your participation in this important survey.

## Confidentiality and Security

Fors Marsh Group will hold your identity as anonymous as allowed by law and will only provide results to the IRS after combining them with other responses. In addition, Fors Marsh Group will provide the raw data to the IRS with all personally identifiable information removed. Please feel confident that your answers will be used solely for the purpose stated above.

### **Paperwork Reduction Act Notice**

*The Paperwork Reduction Act requires that the IRS provide an OMB control number relating to all public information requests along with the address where you can send comments regarding the survey. The OMB number for this survey is 1545-2250. If you have any comments regarding this survey, please write to: IRS, Special Services Section, SE:W:CAR:MP:T:M:S, Room 6129, 1111 Constitution Avenue, NW, Washington, DC 20224.*

### **Privacy Statement**

*The authority requesting the information is 5 USC 301. The primary purpose of asking for the information is to determine steps the IRS can take to improve our service to you. The information may be disclosed as authorized by the routine uses published for the Privacy Act System of Records entitled, *Treas/IRS 00.001 Correspondence Files, including Stakeholder Partnership File, and Correspondence Control Files, as published in the Federal Register: December 10, 2001 (Volume 66, Number 237) [Notices] pages 63785-6. Providing the information is voluntary. Not answering some or all of the questions will not affect you.**

# OVERALL RATING

**1** Overall, how would you rate the IRS on tax forms, instructions, publications, and other tax products that it develops, produces, and distributes to taxpayers?

- ① Very dissatisfied
- ② Dissatisfied
- ③ Neither satisfied nor dissatisfied
- ④ Satisfied
- ⑤ Very satisfied

**3** Approximately how many 2015 federal income tax returns did you prepare for businesses?

- ① Fewer than 10
- ② 10-49
- ③ 50-99
- ④ 100 or more
- ⑤ Not sure

**2** Approximately how many 2015 federal income tax returns did you prepare for individuals?

- ① Fewer than 100
- ② 100-299
- ③ 300-499
- ④ 500 or more
- ⑤ Not sure

**4** How many years have you been in business as a tax professional?

Years

# TAX FORMS

**5** Thinking about ease of understanding, how would you rate the following federal tax forms? If you did not use a form or are unfamiliar with it, please mark Not Applicable/Did Not Use.

	Very Poor	Poor	Neutral	Good	Very Good	Not Applicable/Did Not Use
A. Short form 1040A U.S. Individual Income Tax Return	①	②	③	④	⑤	(NA)
B. Form 1040EZ Income Tax Return for Single and Joint Filers With No Dependents	①	②	③	④	⑤	(NA)
C. Long form 1040 U.S. Individual Income Tax Return	①	②	③	④	⑤	(NA)
D. Form 1040-ES Estimated Tax for Individuals	①	②	③	④	⑤	(NA)
E. Form 8962 Premium Tax Credit	①	②	③	④	⑤	(NA)
F. Form 8965 Health Coverage Exemptions	①	②	③	④	⑤	(NA)
G. Form 8941 Credit for Small Employer Health Insurance Premiums	①	②	③	④	⑤	(NA)
H. Form 940 Employer's Annual Federal Unemployment (FUTA) Tax Return	①	②	③	④	⑤	(NA)
I. Form 941 Employer's QUARTERLY Federal Tax Return	①	②	③	④	⑤	(NA)
J. Form 1065 U.S. Return of Partnership Income	①	②	③	④	⑤	(NA)
K. Form 1095-A Health Insurance Marketplace Statement	①	②	③	④	⑤	(NA)
L. Form 1120 U.S. Corporation Income Tax Return	①	②	③	④	⑤	(NA)
M. Form 1120S U.S. Income Tax Return for an S Corporation	①	②	③	④	⑤	(NA)
N. Form 8863 For Education Credits (American Opportunity and Lifetime Learning Credits)	①	②	③	④	⑤	(NA)
O. Form 8949 Sales and Other Dispositions of Capital Assets	①	②	③	④	⑤	(NA)
P. Schedule A for itemized deductions	①	②	③	④	⑤	(NA)
Q. Schedule B for Interest and Ordinary Dividends	①	②	③	④	⑤	(NA)
R. Schedule C or C-EZ for Profit or Loss From Business (Sole Proprietorship)	①	②	③	④	⑤	(NA)
S. Schedule D for capital gains or losses	①	②	③	④	⑤	(NA)
T. Schedule E for supplemental income and loss	①	②	③	④	⑤	(NA)
U. Schedule F for Profit or Loss from Farming	①	②	③	④	⑤	(NA)
V. Schedule SE for Self-Employment Tax	①	②	③	④	⑤	(NA)
W. Schedule EIC for Earned Income Credit	①	②	③	④	⑤	(NA)

6 Please tell us how any of the tax forms you rated as 'Very Poor' or 'Poor' could be improved.

\_\_\_\_\_

\_\_\_\_\_

7 In thinking about your recent experience with federal tax forms, instructions, and publications, tell us whether you agree or disagree with the following statements.

- A. The graphics and layout were easy to follow.
- B. The size of the print was easy to read.
- C. It was easy to go back and forth between the instructions and the tax form.
- D. The section headings were useful.
- E. The publication was as clear as possible, given the tax law.
- F. The forms made it easier to make accurate calculations.
- G. It was easy to understand the instructions for the forms.
- H. It was easy to understand the forms.
- I. It was easy to find answers in the publications.
- J. It was easy to go back and forth between the publication and instructions.
- K. The worksheets helped me complete the forms.

Strongly Disagree	Disagree	Neither Agree Nor Disagree	Agree	Strongly Agree	Don't Know/ N/A
1	2	3	4	5	NA
1	2	3	4	5	NA
1	2	3	4	5	NA
1	2	3	4	5	NA
1	2	3	4	5	NA
1	2	3	4	5	NA
1	2	3	4	5	NA
1	2	3	4	5	NA
1	2	3	4	5	NA
1	2	3	4	5	NA

### TAX INSTRUCTIONS

8 In general, how would you rate the following aspects of the federal tax instructions you used to prepare 2015 returns?

- A. Table of contents
- B. Important changes
- C. Index
- D. Worksheet
- E. Examples
- F. Flow-charts
- G. Appendix
- H. Tax tables
- I. Tips
- J. Links within document

Very Poor	Poor	Neutral	Good	Very Good	Not Applicable/ Did Not Use
1	2	3	4	5	NA
1	2	3	4	5	NA
1	2	3	4	5	NA
1	2	3	4	5	NA
1	2	3	4	5	NA
1	2	3	4	5	NA
1	2	3	4	5	NA
1	2	3	4	5	NA
1	2	3	4	5	NA
1	2	3	4	5	NA

9 Please tell us how any of the aspects of tax instructions you rated as 'Very Poor' or 'Poor' could be improved.

\_\_\_\_\_

\_\_\_\_\_

# PUBLICATIONS

10

How often did you use the following publications to assist in the preparation of 2015 tax returns?

- A. Pub 17 – *Your Federal Income Tax (For Individuals)*
- B. Pub 463 – *Travel, Entertainment, Gift and Car Expenses*
- C. Pub 501 – *Exemptions, Standard Deduction and Filing Information*
- D. Pub 502 – *Medical and Dental Expenses Including the Health Coverage Tax Credit*
- E. Pub 505 – *Tax Withholding and Estimated Tax*
- F. Pub 523 – *Selling Your Home*
- G. Pub 525 – *Taxable and Nontaxable Income*
- H. Pub 535 – *Business Expenses*
- I. Pub 550 – *Investment Income and Expenses*
- J. Pub 590 A – *Contributions to Individual Retirement Arrangements*
- K. Pub 590 B – *Distributions from Individual Retirement Arrangements*
- L. Pub 596 – *Earned Income Credit*
- M. Pub 946 – *How to Depreciate Property*
- N. Pub 970 – *Tax Benefits for Education*
- O. Pub 974 – *The Premium Tax Credit*
- P. Another publication (Please specify)

Never	Rarely	Sometimes	Frequently
1	2	3	4
1	2	3	4
1	2	3	4
1	2	3	4
1	2	3	4
1	2	3	4
1	2	3	4
1	2	3	4
1	2	3	4
1	2	3	4
1	2	3	4
1	2	3	4
1	2	3	4
1	2	3	4
1	2	3	4
1	2	3	4
1	2	3	4

11

If you did NOT use Publication 17 to assist in the preparation of your client's 2015 federal tax return, how did you get tax information to prepare your client's 2015 tax return? (Select all that apply)

- 1 Used topic-specific publication
- 2 Tax software
- 3 Online research
- 4 Other (Please specify)

12

If you DID use Publication 17 to assist in the preparation of your client's 2015 federal tax return, what format(s) for Publication 17 did you use? (Select all that apply)

- 1 PDF
- 2 HTML (online)
- 3 eBook
- 4 Printed
- 5 Purchased from the Government Printing Office
- 6 Other (Please specify)

13

In general, how would you rate the following aspects of the publications that you used to prepare 2015 tax returns?

- A. Table of contents
- B. Important changes
- C. Index
- D. Worksheet
- E. Examples
- F. Flow-charts
- G. Appendix
- H. Tax tables
- I. Tips
- J. Links within document

Very Poor	Poor	Neutral	Good	Very Good	Not Applicable/ Did Not Use
1	2	3	4	5	(N/A)
1	2	3	4	5	(N/A)
1	2	3	4	5	(N/A)
1	2	3	4	5	(N/A)
1	2	3	4	5	(N/A)
1	2	3	4	5	(N/A)
1	2	3	4	5	(N/A)
1	2	3	4	5	(N/A)
1	2	3	4	5	(N/A)
1	2	3	4	5	(N/A)

14

Thinking about your overall satisfaction, how would you rate each of the following publications? If you have never used the publication, please mark Not Applicable/Did Not Use.

- A. Pub 17 – *Your Federal Income Tax (For Individuals)*
- B. Pub 463 – *Travel, Entertainment, Gift and Car Expenses*
- C. Pub 501 – *Exemptions, Standard Deduction and Filing Information*
- D. Pub 502 – *Medical and Dental Expenses Including the Health Coverage Tax Credit*
- E. Pub 505 – *Tax Withholding and Estimated Tax*
- F. Pub 523 – *Selling Your Home*
- G. Pub 525 – *Taxable and Nontaxable Income*
- H. Pub 535 – *Business Expenses*
- I. Pub 550 – *Investment Income and Expenses*
- J. Pub 590 A – *Contributions to Individual Retirement Arrangements*
- K. Pub 590 B – *Distributions from Individual Retirement Arrangements*
- L. Pub 596 – *Earned Income Credit*
- M. Pub 946 – *How to Depreciate Property*
- N. Pub 970 – *Tax Benefits for Education*
- O. Pub 974 – *The Premium Tax Credit*
- P. Another publication (Please specify)

Very Dissatisfied	Dissatisfied	Neither Satisfied Nor Dissatisfied	Satisfied	Very Satisfied	Not Applicable/ Did Not Use
1	2	3	4	5	(N/A)
1	2	3	4	5	(N/A)
1	2	3	4	5	(N/A)
1	2	3	4	5	(N/A)
1	2	3	4	5	(N/A)
1	2	3	4	5	(N/A)
1	2	3	4	5	(N/A)
1	2	3	4	5	(N/A)
1	2	3	4	5	(N/A)
1	2	3	4	5	(N/A)
1	2	3	4	5	(N/A)
1	2	3	4	5	(N/A)
1	2	3	4	5	(N/A)
1	2	3	4	5	(N/A)
1	2	3	4	5	(N/A)
1	2	3	4	5	(N/A)
1	2	3	4	5	(N/A)

15

Please tell us how any of the publications you rated as 'Very Dissatisfied' or 'Dissatisfied' could be improved.

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16

How would you prefer to receive communications about changes to tax forms, instructions, and publications from the IRS? (Select only one response)

- ① Mail
- ② IRS website (www.irs.gov)
- ③ Email
- ④ Twitter
- ⑤ Other (Please specify)
- ⑥ Not sure

## MARKETING

17

Are you aware that the IRS has created tax publications in eBook format?

- ① Yes – I used one or more to help prepare my client's 2015 tax return
- ② Yes – I am aware of the eBooks but did not use them
- ③ No

18

Have you used your mobile device or tablet to access any of the following IRS tax products?

- A. Tax forms
- B. Instructions
- C. Publications

Yes	No
①	②
①	②
①	②

If NO to all, Skip to Question 20

19

What mobile device have you used to read IRS products and information?

- A. Smart Phone
- B. Tablet
- C. eBook Reader

Yes	No
①	②
①	②
①	②

20

Have you used your mobile device to scan the QR code on the back of any IRS publications?

- ① Yes
- ② No

21

If more tax products were made available for use on mobile devices, how likely would you be to use them?

- ① Very unlikely
- ② Unlikely
- ③ Neither likely nor unlikely
- ④ Likely
- ⑤ Very likely

**WEBSITE**

**22** Did you visit the IRS website to get tax forms, instructions, or publications?  
 ① Yes  
 ② No Skip to Question 27

**23** Were you able to find the tax forms, instructions, or publications you needed on the IRS website?  
 ① Yes  
 ② No

**24** What version of tax forms, instructions, and publications do you feel is most beneficial?  
 ① HTML (online)  
 ② PDF  
 ③ eBook

**25** How would you rate your overall satisfaction with downloading tax forms, instructions, and publications from the IRS website?

- A. Tax forms
- B. Instructions
- C. Publications

	Very Dissatisfied	Dissatisfied	Neither Satisfied Nor Dissatisfied	Satisfied	Very Satisfied
A. Tax forms	①	②	③	④	⑤
B. Instructions	①	②	③	④	⑤
C. Publications	①	②	③	④	⑤

**26** What did you like/dislike about the IRS website's format? Please explain why.

**27** Did you use any Spanish language tax forms, instructions, or publications to complete 2015 tax returns?  
 ① Yes  
 ② No Skip to Question 29

28

Which Spanish language tax forms, instructions or publications did you use to complete 2015 tax returns?

<hr/> <hr/> <hr/>
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29

Do you need tax products in languages other than English or Spanish? If so, please specify which language(s).

① Yes (Please specify)

------

② No

The IRS Media & Publications Division and Fors Marsh Group thank you very much for your time and feedback.  
If you have any questions about this survey, please contact the survey processing center at  
1-800-521-7177, or email us at [irssurveyhelp@forsmarshgroup.com](mailto:irssurveyhelp@forsmarshgroup.com).



**Prototype Customer Satisfaction Survey for External Customers  
of Media & Publications**

**2016 Forms Distribution Survey  
Web Version**

**Internal Revenue Service  
Distribution Division**

## 2016 Forms Distribution Survey

Welcome to the IRS Media & Publications Division customer satisfaction survey. Fors Marsh Group LLC, an independent research organization, is working with the IRS to obtain your feedback as an individual who orders federal tax products from the IRS.

This survey should take you about 10 minutes to complete.

To verify the authenticity of this survey, please visit IRS.gov and enter the search term 'customer surveys'. The IRS Customer Satisfaction Survey page contains a list of valid and current IRS surveys and, as of this issuance, should provide a reference to the *W&I: CARE: M&P: Distribution* customer satisfaction survey.

Thank you in advance for your participation in this important survey.

### Confidentiality and Security

Fors Marsh Group will hold your identity as anonymous as allowed by law and will only provide results to the IRS after combining them with other responses. In addition, Fors Marsh Group will provide the raw data to the IRS with all personally identifiable information removed. Please feel confident that your answers will be used solely for the purpose stated above.

[NEW PAGE]

### CUSTOMER CLASSIFICATION

1. During the current tax year, about how many people obtained federal tax products from your location?  
 None **[Terminate survey] Thank you**  
 1–250  
 251–500  
 More than 500
2. In what type of business or government agency do you work? Please check only one  
 Library  
 Post office  
 City/county government office  
 Military installation  
 Federal government  
 Embassy/consulate  
 Department of State  
 Other - Please specify \_\_\_\_\_

## 2016 Forms Distribution Survey

### OVERALL RATING

3. Overall, how would you rate your satisfaction with the IRS Tax Forms Outlet Program (TFOP)?
- 1 – Very dissatisfied
  - 2 – Dissatisfied
  - 3 – Neither satisfied nor dissatisfied
  - 4 – Satisfied
  - 5 – Very satisfied
4. Do you believe your patrons find value in the service this program offers to taxpayers?
- Yes
  - No
  - Don't know

### TAX PRODUCT FULFILLMENT

5. How would you rate your satisfaction with the IRS delivery process for federal tax products?
- 1 – Very dissatisfied **[Go to Q6]**
  - 2 – Dissatisfied **[Go to Q6]**
  - 3 – Neither satisfied nor dissatisfied **[Skip to Q7]**
  - 4 – Satisfied **[Skip to Q7]**
  - 5 – Very satisfied **[Skip to Q7]**
6. What were the reason(s) for your dissatisfaction with the IRS delivery process for federal tax products?
- 
- 
7. How easy was it for you to reach the IRS about your account?
- 1 – Very difficult
  - 2 – Difficult
  - 3 – Neither easy nor difficult
  - 4 – Easy
  - 5 – Very easy

If you found it difficult to reach the IRS, please explain why.

2016 Forms Distribution Survey

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8. Did you receive UPS email notifications regarding the shipment and delivery of your federal tax products?

- Yes [Go to Q9]
- No [Skip to Q10]

9. Please rate your agreement with the following statement:

The UPS email notifications were valuable.

- 1 – Strongly disagree
- 2 – Disagree
- 3 – Neither agree nor disagree
- 4 – Agree
- 5 – Strongly agree

10. Did you receive your federal tax products in good, usable condition?

- Yes
- No

11. Did the federal tax products arrive within a timeframe that met your needs?

- Yes [Skip to Q16]
- No [Go to Q12]

12. Which products were **not** received within the timeframe that met your needs?

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13. On average, how much later than expected did you receive those products?

- One week
- Two weeks
- Three weeks
- One month
- More than a month

14. Did you receive any communication from the IRS explaining that products would be arriving later than expected?

- Yes
- No

2016 Forms Distribution Survey

15. How satisfied were you with the way the IRS resolved program issues you encountered before or during the tax filing season?

- 1 – Very dissatisfied
- 2 – Dissatisfied
- 3 – Neither satisfied nor dissatisfied
- 4 – Satisfied
- 5 – Very satisfied

16. How would you rate your satisfaction with the change in offerings from the IRS Tax Forms Outlet Program (TFOP) this year?

- 1 – Very dissatisfied
- 2 – Dissatisfied
- 3 – Neither satisfied nor dissatisfied
- 4 – Satisfied
- 5 – Very satisfied

17. Are you using Publication 1132, Reproducible Copies of Federal Tax Forms and Instructions?

- Yes **[Go to Q19]**
- No **[Skip to Q20]**
- Not aware of this product **[Skip to Q20]**

18. Please rate your agreement with the following statement:

Publication 1132, Reproducible Copies of Federal Tax Forms and Instructions is a valuable resource:

- 1 – Strongly disagree
- 2 – Disagree
- 3 – Neither agree nor disagree
- 4 – Agree
- 5 – Strongly agree

19. Do you or your patrons retrieve federal tax products from the IRS website?

- Yes
- No
- Don't know

20. Are you aware that an eBook version of Publication 17 is now available for iPads?

- Yes
- No

## 2016 Forms Distribution Survey

21. Do you believe your patrons would like to receive tax products through web-accessible mobile devices (such as smartphones, iPads, and Kindles)?

- Yes
- No
- Don't know

22. In your opinion, what would be the most important improvements that the IRS could make in its tax product ordering, delivery, and communications processes?

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The IRS and Fors Marsh Group LLC thank you very much for your participation. Your responses will be very helpful to the IRS in better serving taxpayers' needs in the future. If you have any comments or questions, please feel free to email us at [irssurveyhelp@forsmarshgroup.com](mailto:irssurveyhelp@forsmarshgroup.com), or call the help line at 1-800-521-7177.

### **Paperwork Reduction Act Notice**

*The Paperwork Reduction Act requires that the IRS provide an OMB control number relating to all public information requests along with the address where you can send comments regarding the survey. The OMB number for this survey is 1545-2250. If you have any comments regarding this survey, please write to: IRS, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, Room 6526, 1111 Constitution Avenue, NW, Washington, DC 20224.*

### **Privacy Statement**

*The authority requesting the information is 5 USC 301. The primary purpose of asking for the information is to determine steps IRS can take to improve our service to you. The information may be disclosed as authorized by the routine uses published for the Privacy Act System of Records entitled, Treas/IRS 00.001 Correspondence Files, including Stakeholder Partnership File, and Correspondence Control Files, as published in the Federal Register: December 10, 2001 (Volume 66, Number 237) [Notices] pages 63785-6. Providing the information is voluntary. Not answering some or all of the questions will not affect you.*

Dear

I am asking for your help in improving the service the IRS provides tax professionals. I invite you to take part in a survey of your opinions about the resources available to you when you prepare tax returns for your clients.

Fors Marsh Group, an independent research company, is administering the survey for the IRS. In a few days, you will receive a letter from Fors Marsh Group with instructions for completing the survey online or by mail. It should take about 15 minutes to complete.

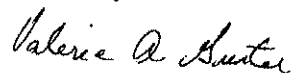
The primary purpose for requesting this information is to help the IRS improve its service to taxpayers. Our authority for requesting the information is 5 USC and 26 USC 7801.

Providing information is voluntary. However, if you do not answer all or part of the survey questions, the IRS may lack information it could use to improve taxpayer service. The information you provide may be disclosed to an IRS contractor when authorized by law. The contractor is required to follow to the extent (allowed by law) protections required by the Privacy Act and/or Internal Revenue Code section 6103.

We are committed to improving service to every customer. Please help us in this effort by completing the survey as soon as possible.

You may contact Patty Wagner at the IRS via phone at 240-613-5680 or by e-mail at [patty.wagner@irs.gov](mailto:patty.wagner@irs.gov) to verify sponsorship of the survey.

Sincerely,



Valerie A. Gunter  
Director, IRS Media & Publications

Dear

A few days ago, you received a letter from Valerie Gunter, Director, Media & Publications, asking for your help with improving the IRS resources available to tax professionals. The IRS is committed to improving its performance and service to the American public and its partners. As part of this improvement effort, the IRS is conducting a survey of tax professionals that prepare and file returns for clients.

You were chosen at random to participate in this survey, which is administered by Fors Marsh Group, an independent research company. You may complete the survey either by mail or online. If you are completing the survey by mail, please use the postage-paid reply envelope to return your completed survey by

If you choose to complete it online, you can access the survey from any computer that has Internet access by entering the Internet address below into your browser:

**[www.pubspreparers.com](http://www.pubspreparers.com)**

Once you access the website for the survey, you will be asked to provide a unique password. Please enter the password below:

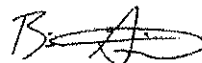
**PASSWORD:**

You will be able to exit the survey and re-enter at a later time using this password. It will also protect any data you have entered if you experience any computer disruptions. Fors Marsh Group will not share this password with the IRS at any time during or after this study. In addition, Fors Marsh Group will not provide any identifying information to the IRS along with your responses and will hold your identity private to the extent permitted by law. Your responses will be reported to the IRS only after they have been combined with responses from other tax professionals.

The survey should take about 15 minutes to complete. While your participation is voluntary, we strongly encourage you to complete the survey. If you have any questions or concerns about the survey process, please call us toll-free at 1-800-521-7177, or e-mail us at **[irssurveyhelp@forsmarshgroup.com](mailto:irssurveyhelp@forsmarshgroup.com)**. You can contact Patty Wagner at the IRS via phone at 240-613-5680 or by e-mail at **[patty.wagner@irs.gov](mailto:patty.wagner@irs.gov)** to verify sponsorship of the survey.

Thank you in advance for your cooperation.

Sincerely,



Brian K. Griepentrog, Ph.D.  
Director of Research Studies  
Fors Marsh Group LLC



Dear

Recently, you received a letter from Valerie Gunter, Director, Media & Publications, inviting you to participate in a survey of tax professionals that prepare and file tax returns. Fors Marsh Group, an independent research company, is administering this survey to help the IRS improve the resources it offers to tax professionals.

Our records indicate that you have not yet completed the survey. If you have not already done so, please take a few minutes today to provide your feedback to the IRS. Your responses are critical to IRS efforts to enhance the resources available to tax professionals.

For your convenience, the survey can be completed either online or by using the attached paper survey. If you are completing the paper survey, please use the postage-paid reply envelope to return your completed survey by

If you choose to complete it online, you can access the survey by entering the following Internet address into your web browser: **www.pubspreparers.com**

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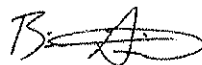
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The survey should take about 15 minutes to complete. While your participation is voluntary, we strongly encourage you to complete the survey. If you have any questions or concerns about the survey process, please call us toll-free at 1-800-521-7177, or e-mail us at **irssurveyhelp@forsmarshgroup.com**. You can contact Patty Wagner at the IRS via phone at 240-613-5680 or by e-mail at **patty.wagner@irs.gov** to verify sponsorship of the survey.

Thank you in advance for your cooperation.

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