## Welcome and Thank You Text

### Welcome Text

Thank you for visiting the Internal Revenue Service (IRS).  You've been randomly selected to tell us how we can improve IRS.gov.

Participation is voluntary and all responses are anonymous.  We only receive compiled data, which does not allow us to identify you individually.  Please do NOT provide any personal information (name, Social Security number, etc.) in the "comments" sections of this survey.

As a reminder, we are NOT able to answer any tax or personal questions submitted through this survey.

Required questions are denoted by an *

### Welcome Text - Tablet / Phone

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### Thank You Text

Thank you very much for completing this survey. All answers and comments will be used by the IRS to help better serve you.

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### Example Desktop



### Example Mobile

Red & Strike-Through: Delete
Underlined & Italicized: Re-order
Pink: Addition
Blue: Reword

FORESEE

| | Label | Element Questions |
|---|---|---|
| | | **Look and Feel (1=Poor, 10=Excellent, Don't Know)** |
| 1 | Look and Feel - Appeal | Please rate the **visual appeal** of IRS.gov. |
| 2 | Look and Feel - Balance | Please rate the **balance of graphics and text** on IRS.gov. |
| 3 | Look and Feel - Readability | Please rate the **readability of the pages** on IRS.gov. |
| | | **Site Performance (1=Poor, 10=Excellent, Don't Know)** |
| 4 | Site Performance - Loading | Please rate **how quickly pages load** on IRS.gov. |
| 5 | Site Performance - Consistency | Please rate the **consistency of speed from page to page** on IRS.gov. |
| 6 | Site Performance - Completeness | Please rate **how completely the page content loads** on IRS.gov. |
| | | **Navigation (1=Poor, 10=Excellent, Don't Know)** |
| 7 | Navigation - Organized | Please rate **how well IRS.gov is organized**. |
| 8 | Navigation - Options | Please rate the **options available for navigating** IRS.gov. |
| 9 | Navigation - Layout | Please rate **how well IRS.gov layout helps you find what you need.** |
| | | **Information Browsing (1=Poor, 10=Excellent, Don't Know)** |
| 10 | Information Browsing - Sort | Please rate the **ability to sort information by criteria that are important to you** on IRS.gov. |
| 11 | Information Browsing - Narrow | Please rate the **ability to narrow choices to find the information you are looking** for on IRS.gov. |
| 12 | Information Browsing - Features | Please rate how well the **features** on IRS.gov **help you find the information you need**. |
| | | **Site Information (1=Poor, 10=Excellent, Don't Know)** |
| 13 | Site Information - Thoroughness | Please rate the **thoroughness of information provided** on IRS.gov. |
| 14 | Site Information - Understandable | Please rate **how understandable IRS.gov's information is**. |
| 15 | Site Information - Answers | Please rate how well IRS.gov's **information provides answers to your questions**. |

| | Label | Satisfaction Questions |
|---|---|---|
| | | **Satisfaction** |
| 16 | Satisfaction - Overall | What is your **overall satisfaction** with IRS.gov? (1=Very Dissatisfied, 10=Very Satisfied) |
| 17 | Satisfaction - Expectations | How well does IRS.gov **meet your expectations**? (1=Falls Short, 10=Exceeds) |
| 18 | Satisfaction - Ideal | How does IRS.gov **compare to your idea of an ideal website**? (1=Not Very Close, 10=Very Close) |

| | Label | Future Behaviors |
|---|---|---|
| | | **Return (1=Very Unlikely, 10=Very Likely)** |
| 19 | Return | How likely are you to **return** to IRS.gov? |
| | | **Recommend (1=Very Unlikely, 10=Very Likely)** |
| 20 | Recommend | How likely are you to **recommend** IRS.gov to someone else? |
| | | **Primary Resource (1=Very Unlikely, 10=Very Likely)** |
| 21 | Primary Resource | How likely are you to use IRS.gov as your **primary resource** for tax information? |

| Model Name | IRS Main Survey V4 |
|---|---|
| Model ID | E1xg4pZdttEcYpQk9wEo5A4C |
| Partitioned | Yes - 2MQ |
| Date | |

| QID | AP Question Tag | Skip From | Question Text |
|---|---|---|---|
| JLB8418Q001 | us_department_of_treasury_irs_q_irs_web_browse_v4_1_role | | I am visiting IRS.gov today as… |
| JLB8418Q002 | us_department_of_treasury_irs_q_irs_web_browse_v4_1a_other_role | 1a | Please specify what best describes your role today: |
| JLB8418Q003 | us_department_of_treasury_ir reasury_ir | 2 | Do any of these situations apply to you? (Select all that apply.) |

| JLB8418Q004 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_2a_ other_indi vidual_rol es | 2a | Please describe your tax role/situation: |
|---|---|---|---|
| JLB8418Q005 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_3_re ason | | **What was your main reason for visiting** IRS.gov today? |
| JLB8418Q006 | us_depart ment_of_t reasury_ir | 3a | **What was your main reason for visiting** IRS.gov today? |

| JLB8418Q007 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_3b_ other_rea son | 3b | Please specify other reason for visiting: |
|---|---|---|---|
| JLB8418Q008 | us_depart ment_of_t reasury_ir | 4a | Please indicate which specific **payment** tasks describe your visit today. (Select all that apply) |
| JLB8418Q009 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_4aa _other_pa yments | 4aa | Please specify your other payment task: |
| JLB8418Q010 | us_depart ment_of_t reasury_ir | 4b | Please indicate which specific **refund** tasks describe your visit today. (Select all that apply) |
| JLB8418Q011 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_4ba _other_ref und | 4ba | Please specify you other refund task: |
| JLB8418Q012 | us_depart ment_of_t reasury_ir s_q_irs_w | 4c | Please indicate which specific **tax records** tasks describe your visit today. (Select all that apply) |

| | | | |
|---|---|---|---|
| | | | |
| JLB8418Q013 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_4ca _other_tra nscript | 4ca | Please specify your other tax records task: |
| JLB8418Q014 | us_depart ment_of_t reasury_ir s_q_irs_w | 4d | Please indicate which specific **forms, publications or instructions** tasks describe your visit today. (Select all that apply) |
| JLB8418Q015 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_4da _other_for ms | 4da | Please specify your other forms, publications or instructions task: |
| JLB8418Q016 | us_depart ment_of_t reasury_ir | 4e | Please indicate which specific **penalties** tasks describe your visit today. (Select all that apply) |

| | | | |
|---|---|---|---|
| | | | |
| JLB8418Q017 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_4ea _other_pe nalties | 4ea | Please specify your other penalties task: |
| JLB8418Q018 | us_depart ment_of_t reasury_ir | 4f | What type of **identification number** did you want to request or find more information about? |
| JLB8418Q019 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_4fa_ other_id_n umber | 4fa | Please specify what identification number information were looking for: |
| JLB8418Q020 | us_depart ment_of_t reasury_ir s_q_irs_w | | Prior to this visit, what contact have you had with the IRS about your main reason for visiting? (Select all that apply) |

| JLB8418Q021 | us_department_of_treasury_irs_q_irs_web_browse_v4_6_quality | | Please rate your agreement with the following statements about your visit to IRS.gov today: My need was addressed. |
| JLB8418Q022 | us_department_of_treasury_irs_q_irs_web_browse_v4_6a_oe_need | 6a | Why was your need not addressed?  Please do NOT provide any personal information (name, Social Security number, etc.) in your response. |
| JLB8418Q023 | us_department_of_treasury_irs_q_irs_web_browse_v4_7_ease | | It was easy to complete what I needed to do. |
| JLB8418Q024 | us_department_of_t | | It took a reasonable amount of time to do what I needed to do. |
| JLB8418Q025 | us_department_of_treasury_ir | | This interaction increased my confidence in the IRS. |

| | | | |
|---|---|---|---|
| JLB8418Q026 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_10_l ogin | | Were you able to log in to (or create an account for) any IRS online tool today? |
| JLB8418Q027 | us_depart ment_of_t reasury_ir s_q_irs_w | 10a | What prevented you from logging into an IRS online tool today? (Please don't provide any personal information in your response) |
| JLB8418Q028 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_10b _online_to ol | 10b | Which IRS online tool(s) did you use today? (Select all that apply) |
| JLB8418Q029 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_10c _oe_onlin e_tool | 10c | Please specify which online tools you used today: |
| JLB8418Q030 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_11_i nformation | | How did you look for information today? (Select all that apply) |

| JLB8418Q031 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_11a _search | 11a | How was your **search experience** today? |
| JLB8418Q032 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_11b _oe_searc h_term | 11b | What specific search term(s) did you use to find information on IRS.gov? |
| JLB8418Q033 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_11c _navigatio n | 11c | How was your **navigation experience today**? (Select all that apply) |
| JLB8418Q034 | us_depart ment_of_t reasury_ir | | In the past year, about how often did you visit IRS.gov? |

| JLB8418Q035 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_13_ oe_improv ement | | If you could change one thing about this website what would it be?<br>Please do NOT provide any personal information (name, Social Security number, etc.) in your response. |
|---|---|---|---|

| Answer Choices | Skip To |
|---|---|
| An individual taxpayer (myself, my household, family member, etc.) | *2* |
| A business (corporation, partnership, small business, employee, etc.) | |
| A charity or non-profit organization (tax exempt entity, government entity, employee, etc.) | |
| A tax professional (accountant, attorney, bank trust officer, enrolled agent, tax consultant, tax preparer, etc.) | |
| Other | *1a* |
| | |
| Standard 1040 Filer (Wage/salary receiving employee) | |
| Retired | |
| Have self-employment income (1099) | |
| Foreign National Living in the US | |
| US Taxpayer living abroad | |
| Parent acting on behalf of a child | |
| Active duty military | |
| Acting on behalf of a deceased person and/or estate | |
| Disability recipients | |
| Other | *2a* |

| | |
|---|---|
| Economic impact payment information | |
| Refund status | *4b* |
| Tax forms, publications, or instructions | 4d |
| Child tax credit payment information | |
| Filing or filing information | |
| Payments, payment plans or balance information | 4a |
| Tax records (tax transcript, account transcript, etc.) | 4c |
| Other | 3a |
| Tools for tax professionals (e.g., e-services) | |
| Free File information | |
| Tax Identification Number (EIN, PTIN, ITIN, etc.) | 4f |
| Penalties | 4e |
| Credits and deduction information | |
| Amended tax return status or information | |
| Identity theft, fraud, or scams | |
| General tax information | |
| Other | 3b |

| | |
|---|---|
| | |
| Make an online payment | |
| Seek information about payment options | |
| Set up an installment agreement or online payment agreement | |
| Look-up, modify, or cancel an existing payment | |
| Look-up, modify, or cancel an existing payment agreement | |
| Check my account balance | |
| View my payment history | |
| Other | 4aa |
| | |
| Check status of refund | |
| General information about tax refunds | |
| Review refund FAQs | |
| Other | 4ba |
| | |
| Download a copy of a transcript | |
| Order a transcript in the mail | |

| | |
|---|---|
| Find info about transcripts | |
| Obtain my adjusted gross income (AGI) from a previous year | |
| Obtain my filing status from a previous year | |
| View my current or prior year return | |
| View my balance and payment history | |
| Other | 4ca |
| | |
| Download current year tax forms | |
| Download prior year tax forms | |
| Print current year tax forms | |
| Print prior year tax forms | |
| Better understand tax rules and procedures | |
| Order tax forms | |
| e-file my forms | |
| Find examples of completed forms | |
| Other | **4da** |
| | |
| Learn about penalties for individual taxpayers | |
| Learn about penalties for small businesses or corporations | |
| Learn how to avoid a penalty | |

| | |
|---|---|
| Learn how to compute a penalty | |
| Learn about penalty relief criteria | |
| Learn how to request penalty relief | |
| Learn how to appeal a rejected request for penalty relief | |
| Learn about IRA additional tax penalties | |
| See what penalties I owe and/or the amounts due | |
| Make a payment | |
| Other | **4ea** |
| | |
| Employer Identification Number (EIN) | |
| Preparer Tax Identification Number (PTIN) | |
| Electronic Filing Identification Number (EFIN) | |
| Individual Tax Identification Number (ITIN) | |
| FATCA Identification Number (FIN) or FATCA Entity ID | |
| Identity Protection Personal Identification Number (IP PIN) | |
| Other | **4fa** |
| Not sure/don't know | |
| | |
| Have not been in contact with the IRS for this reason | |

| | |
|---|---|
| Received a notice or letter from the IRS | |
| Called the IRS and spoke to a customer service representative | |
| Called the IRS and used the automated phone system to get information | |
| Visited an IRS office (Taxpayer Assistance Center) | |
| Visited IRS.gov | |
| Strongly Disagree | **6a** |
| Disagree | **6a** |
| Neutral | |
| Agree | |
| Strongly Agree | |
| | |
| Strongly Disagree | |
| Disagree | |
| Neutral | |
| Agree | |
| Strongly Agree | |
| Strongly Disagree | |
| Disagree | |
| Neutral | |
| Agree | |
| Strongly Agree | |
| Strongly Disagree | |
| Disagree | |

| | |
|---|---|
| Neutral | |
| Agree | |
| Strongly Agree | |
| I did not have to log in or create an account | |
| I successfully logged in or created an account | **10b** |
| I was unable to log in or create an account | **10a** |
| | |
| Your account | |
| Direct Pay | |
| Where's My Refund | |
| Get Transcript | |
| Other | **10c** |
| | |
| Search engine (such as Google or Bing) brought me to IRS website | |
| Used IRS website search | **11a** |
| Navigated through IRS website menu and/or links | **11c** |
| Typed link directly into the browser or bookmarked link | |
| Other | |

| | |
|---|---|
| I found what I was looking for in the Top Recommendations | |
| Search delivered a helpful set of results | |
| I was able to find what I searched for, but it wasn't easy | **11b** |
| Search did not deliver a helpful set of results | **11b** |
| | |
| I did not encounter any difficulties with site navigation | |
| Navigation got more confusing as I got deeper into the site | |
| Expected links were not present on pages | |
| Links did not take me where I expected | |
| I was unsure where I should be clicking within the site | |
| Encountered technical difficulties (links didn't work, received error messages, etc.) | |
| This is my first time | |
| About once a week or more | |
| About once a month | |
| Every 6 months or less | |
| About once a year | |
| Less than once a year | |

| AP Answer Tag | Required Y/N | Type |
|---|---|---|
| an_individual_taxpayer_myself_my_household_family_member_etc | Y | Radio button, one-up vertical |
| a_business_corporation_partnership_small_business_employee_etc | | |
| a_charity_or_non_profit_organization_tax_exempt_entity_government_entity_employee_etc | | |
| a_tax_professional_accountant_attorney_bank_trust_officer_enrolled_agent_tax_consultant_tax_preparer_etc | | |
| other | | |
| | N | Text field,  <100 char |
| standard_1040_filer_wage_salary_receiving_employee | N | Check box, one-up vertical |
| retired | | |
| have_self_employment_income_1099 | | |
| foreign_national_living_in_the_us | | |
| us_taxpayer_living_abroad | | |
| parent_acting_on_behalf_of_a_child | | |
| active_duty_military | | |
| acting_on_behalf_of_a_deceased_person_and_or_estate | | |
| disability_recipients | | |
| other | | |

| | N | Text field, <100 char |
|---|---|---|
| | Y | Radio button, one-up vertical |
| refund_status_or_refund_information | | |
| tax_forms_publications_or_instructions | | |
| filing_or_filing_information | | |
| payments_or_balance_info_make_a_payment_payment_agreements_check_balance_find_payment_info_etc | | |
| tax_records_tax_transcript_account_transcript_etc | | |
| other | | |
| tools_for_tax_professionals_eg_e_services | Y | Radio button, one-up vertical |
| free_file_information | | |
| tax_identification_number_ein_ptin_itin_etc | | |
| penalties | | |
| credits_and_deduction_information | | |
| amended_tax_return_status_or_amend_my_previously_filed_return | | |
| identity_theft_fraud_or_scams | | |
| general_tax_information | | |
| other | | |

| | | |
|---|---|---|
| | N | Text field,  <100 char |
| make_an_online_payment | Y | Checkbox, one-up vertical |
| seek_information_about_payment_options | | |
| set_up_an_installment_agreement_or_online_payment_agreement | | |
| look_up_modify_or_cancel_an_existing_payment | | |
| look_up_modify_or_cancel_an_existing_payment_agreement | | |
| check_my_account_balance | | |
| view_my_payment_history | | |
| other | | |
| | N | Text field,  <100 char |
| check_status_of_refund | Y | Checkbox, one-up vertical |
| general_information_about_tax_refunds | | |
| review_refund_faqs | | |
| other | | |
| | N | Text field,  <100 char |
| download_a_copy_of_a_transcript | Y | Checkbox, one-up vertical |
| order_a_transcript_in_the_mail | | |

| | | |
|---|---|---|
| find_info_about_transcripts | | |
| obtain_my_adjusted_gross_income_agi_from_a_previous_year | | |
| obtain_my_filing_status_from_a_previous_year | | |
| view_my_current_or_prior_year_return | | |
| view_my_balance_and_payment_history | | |
| other | | |
| | N | Text field, <100 char |
| download_current_year_tax_forms | Y | Checkbox, one-up vertical |
| download_prior_year_tax_forms | | |
| print_current_year_tax_forms | | |
| print_prior_year_tax_forms | | |
| better_understand_tax_rules_and_procedures | | |
| order_tax_forms | | |
| e_file_my_forms | | |
| find_examples_of_completed_forms | | |
| other | | |
| | N | Text field, <100 char |
| learn_about_penalties_for_individual_taxpayers | Y | Checkbox, one-up vertical |
| learn_about_penalties_for_small_businesses_or_corporations | | |
| learn_how_to_avoid_a_penalty | | |

| | | |
|---|---|---|
| learn_how_to_compute_a_penalty | | |
| learn_about_penalty_relief_criteria | | |
| learn_how_to_request_penalty_relief | | |
| learn_how_to_appeal_a_rejected_request_for_penalty_relief | | |
| learn_about_ira_additional_tax_penalties | | |
| see_what_penalties_i_owe_and_or_the_amounts_due | | |
| make_a_payment | | |
| other | | |
| | N | Text field,  <100 char |
| employer_identification_number_ein | Y | Radio button, one-up vertical |
| preparer_tax_identification_number_ptin | | |
| electronic_filing_identification_number_efin | | |
| individual_tax_identification_number_itin | | |
| fatca_identification_number_fin_or_fatca_entity_id | | |
| identity_protection_personal_identification_number_ip_pin | | |
| other | | |
| not_sure_dont_know | | |
| | N | Text area, <100 characters |
| have_not_been_in_contact_with_the_irs_for_this_reason | N | Checkbox, one-up vertical |

| | | | |
|---|---|---|---|
| received_a_notice_or_letter_fr om_the_irs | | | |
| called_the_irs_and_spoke_to_ a_customer_service_represen tative | | | |
| called_the_irs_and_used_the_ automated_phone_system_to _get_information | | | |
| visited_an_irs_office_taxpayer _assistance_center | | | |
| visited_irsgov | | | |
| strongly_disagree | Y | Radio button, one-up vertical | |
| disagree | | | |
| neutral | | | |
| agree | | | |
| strongly_agree | | | |
| | N | Text area,  <255 character limit | |
| strongly_disagree | Y | Radio button, one-up vertical | |
| disagree | | | |
| neutral | | | |
| agree | | | |
| strongly_agree | | | |
| strongly_disagree | Y | Radio button, one-up vertical | |
| disagree | | | |
| neutral | | | |
| agree | | | |
| strongly_agree | | | |
| strongly_disagree | Y | Radio button, one-up vertical | |
| disagree | | | |

| | | |
|---|---|---|
| neutral | | |
| agree | | |
| strongly_agree | | |
| i_did_not_have_to_log_in_or_create_an_account | N | Radio button, one-up vertical |
| i_successfully_logged_in_or_created_an_account | | |
| i_was_unable_to_log_in_or_create_an_account | | |
| | N | Text area, no character limit |
| your_account | N | Checkbox, one-up vertical |
| direct_pay | | |
| wheres_my_refund | | |
| get_transcript | | |
| other | | |
| | N | Text area, <100 character limit |
| search_engine_such_as_google_or_bing_brought_me_to_irs_website | N | Checkbox, one-up vertical |
| used_irs_website_search | | |
| navigated_through_irs_website_menu_and_or_links | | |
| typed_link_directly_into_the_browser_or_bookmarked_link | | |
| other | | |

| | | | |
|---|---|---|---|
| i_found_what_i_was_looking_for_in_the_top_recommendations | | N | Radio button,  one-up vertical |
| search_delivered_a_helpful_set_of_results | | | |
| i_was_able_to_find_what_i_searched_for_but_it_wasn't_easy | | | |
| search_did_not_deliver_a_helpful_set_of_results | | | |
| | | N | **Text area, <100 character limit** |
| i_did_not_encounter_any_difficulties_with_site_navigation | | N | Checkbox,  one-up vertical |
| navigation_got_more_confusing_as_i_got_deeper_into_the_site | | | |
| expected_links_were_not_present_on_pages | | | |
| links_did_not_take_me_where_i_expected | | | |
| i_was_unsure_where_i_should_be_clicking_within_the_site | | | |
| encountered_technical_difficulties_links_didnt_work_received_error_messages_etc | | | |
| this_is_my_first_time | | N | Radio button, one-up vertical |
| about_once_a_week_or_more | | | |
| about_once_a_month | | | |
| every_6_months_or_less | | | |
| about_once_a_year | | | |
| less_than_once_a_year | | | |

| | N | Text area, no character limit |
|---|---|---|
| | | |

| Special Instructions | CQ Label |
|---|---|
| Skip logic group | 1_Role |
| Skip logic group | 1A_Other Role |
| Skip logic group | 2_Individual Roles |

| Skip logic group | 2A_Other Individual Roles |
| --- | --- |
| Skip logic group | 3_Reason |
| Skip logic group | 3A_Reason II |

| | |
|---|---|
| Skip logic group | 3B_Other Reason |
| Skip logic group | 4A_Payments |
| Skip logic group | 4AA_Other Payments |
| Skip logic group | 4B_Refund |
| Skip logic group | 4BA_Other Refund |
| Skip logic group | 4C_Transcript |

| | |
|---|---|
| | |
| Skip logic group | 4CA_Other Transcript |
| Skip logic group | 4D_Forms |
| Skip logic group | 4DA_Other Forms |
| Skip logic group | 4E_Penalties |

| | |
|---|---|
| | |
| Skip logic group | 4EA_Other Penalties |
| Skip logic group | 4F_ID Number |
| Skip logic group | 4FA_Other ID Number |
| | 5_Contact |

| | |
|---|---|
| | |
| Skip logic group | 6_Quality |
| Skip logic group | 6A_OE Need |
| | 7_Ease |
| | 8_Efficiency |
| | 9_Confidence |

| Skip logic group | 10_Login |
|---|---|
| Skip logic group | 10A_OE Login |
| Skip logic group | 10B_Online Tool |
| Skip logic group | 10C_OE Online Tool |
| Skip logic group | 11_Information |

| Skip logic group | 11A_Search |
| --- | --- |
| Skip logic group | 11B_OE Search Term |
| Skip logic group | 11C_Navigation |
| | 12_Frequency |

| | 13_OE Improvement |
|---|---|
| | |

| Model Name | IRS Main Survey V4 |
|---|---|
| Model ID | E1xg4pZdttEcYpQk9wEo5A4C |
| Partitioned | Yes - 2MQ |
| Date | |

| QID | AP Question Tag | Skip From | Question Text |
|---|---|---|---|
| JLB8418Q001 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_1_ro le | | I am visiting IRS.gov today as… |
| JLB8418Q002 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_1a_ other_role | 1a | Please specify what best describes your role today: |
| JLB8418Q003 | us_depart ment_of_t reasury_ir | 2 | Do any of these situations apply to you? (Select all that apply.) |

| JLB8418Q004 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_2a_ other_indi vidual_rol es | 2a | Please describe your tax role/situation: |
|---|---|---|---|
| JLB8418Q005 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_3_re ason | | **What was your main reason for visiting** IRS.gov today? |
| JLB8418Q006 | us_depart ment_of_t reasury_ir | 3a | **What was your main reason for visiting** IRS.gov today? |

| | | | |
|---|---|---|---|
| JLB8418Q007 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_3b_ other_rea son | 3b | Please specify other reason for visiting: |
| JLB8418Q008 | us_depart ment_of_t reasury_ir | 4a | Please indicate which specific **payment** tasks describe your visit today. (Select all that apply) |
| JLB8418Q009 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_4aa _other_pa yments | 4aa | Please specify your other payment task: |
| JLB8418Q010 | us_depart ment_of_t reasury_ir | 4b | Please indicate which specific **refund** tasks describe your visit today. (Select all that apply) |
| JLB8418Q011 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_4ba _other_ref und | 4ba | Please specify you other refund task: |
| JLB8418Q012 | us_depart ment_of_t reasury_ir s_q_irs_w | 4c | Please indicate which specific **tax records** tasks describe your visit today. (Select all that apply) |

| | | | |
|---|---|---|---|
| | | | |
| JLB8418Q013 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_4ca _other_tra nscript | 4ca | Please specify your other tax records task: |
| JLB8418Q014 | us_depart ment_of_t reasury_ir s_q_irs_w | 4d | Please indicate which specific **forms, publications or instructions** tasks describe your visit today. (Select all that apply) |
| JLB8418Q015 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_4da _other_for ms | 4da | Please specify your other forms, publications or instructions task: |
| JLB8418Q016 | us_depart ment_of_t reasury_ir | 4e | Please indicate which specific **penalties** tasks describe your visit today. (Select all that apply) |

| | | | |
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| | | | |
| JLB8418Q017 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_4ea _other_pe nalties | 4ea | Please specify your other penalties task: |
| JLB8418Q018 | us_depart ment_of_t reasury_ir | 4f | What type of **identification number** did you want to request or find more information about? |
| JLB8418Q019 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_4fa_ other_id_n umber | 4fa | Please specify what identification number information were looking for: |
| JLB8418Q020 | us_depart ment_of_t reasury_ir s_q_irs_w | | Prior to this visit, what contact have you had with the IRS about your main reason for visiting? (Select all that apply) |

| JLB8418Q021 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_6_q uality | | Please rate your agreement with the following statements about your visit to IRS.gov today: My need was addressed. |
| JLB8418Q022 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_6a_ oe_need | 6a | Why was your need not addressed?  Please do NOT provide any personal information (name, Social Security number, etc.) in your response. |
| JLB8418Q023 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_7_e ase | | It was easy to complete what I needed to do. |
| JLB8418Q024 | us_depart ment_of_t | | It took a reasonable amount of time to do what I needed to do. |
| JLB8418Q025 | us_depart ment_of_t reasury_ir | | This interaction increased my confidence in the IRS. |

| | | | |
|---|---|---|---|
| JLB8418Q026 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_10_l ogin | | Were you able to log in to (or create an account for) any IRS online tool today? |
| JLB8418Q027 | us_depart ment_of_t reasury_ir s_q_irs_w | 10a | What prevented you from logging into an IRS online tool today? (Please don't provide any personal information in your response) |
| JLB8418Q028 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_10b _online_to ol | 10b | Which IRS online tool(s) did you use today? (Select all that apply) |
| JLB8418Q029 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_10c _oe_onlin e_tool | 10c | Please specify which online tools you used today: |
| JLB8418Q030 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_11_i nformation | | How did you look for information today? (Select all that apply) |

| JLB8418Q031 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_11a _search | 11a | How was your **search experience** today? |
| JLB8418Q032 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_11b _oe_searc h_term | 11b | What specific search term(s) did you use to find information on IRS.gov? |
| JLB8418Q033 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_11c _navigatio n | 11c | How was your **navigation experience today**? (Select all that apply) |
| JLB8418Q034 | us_depart ment_of_t reasury_ir | | In the past year, about how often did you visit IRS.gov? |

| JLB8418Q035 | us_department_of_treasury_irs_q_irs_web_browse_v4_13_oe_improvement | | If you could change one thing about this website what would it be?<br>Please do NOT provide any personal information (name, Social Security number, etc.) in your response. |

| Answer Choices | Skip To |
|---|---|
| An individual taxpayer (myself, my household, family member, etc.) | *2* |
| A business (corporation, partnership, small business, employee, etc.) | |
| A charity or non-profit organization (tax exempt entity, government entity, employee, etc.) | |
| A tax professional (accountant, attorney, bank trust officer, enrolled agent, tax consultant, tax preparer, etc.) | |
| Other | *1a* |
| | |
| Standard 1040 Filer (Wage/salary receiving employee) | |
| Retired | |
| Have self-employment income (1099) | |
| Foreign National Living in the US | |
| US Taxpayer living abroad | |
| Parent acting on behalf of a child | |
| Active duty military | |
| Acting on behalf of a deceased person and/or estate | |
| Disability recipients | |
| Other | *2a* |

| | |
|---|---|
| Economic impact payment information | |
| *Refund status* | **4b** |
| Tax forms, publications, or instructions | **4d** |
| Child tax credit payment information | |
| Filing or filing information | |
| Payments, payment plans or balance information | **4a** |
| Tax records (tax transcript, account transcript, etc.) | **4c** |
| Other | **3a** |
| Tools for tax professionals (e.g., e-services) | |
| Free File information | |
| Tax Identification Number (EIN, PTIN, ITIN, etc.) | **4f** |
| Penalties | **4e** |
| Credits and deduction information | |
| Amended tax return status or information | |
| Identity theft, fraud, or scams | |
| General tax information | |
| Other | **3b** |

| | |
|---|---|
| | |
| Make an online payment | |
| Seek information about payment options | |
| Set up an installment agreement or online payment agreement | |
| Look-up, modify, or cancel an existing payment | |
| Look-up, modify, or cancel an existing payment agreement | |
| Check my account balance | |
| View my payment history | |
| Other | 4aa |
| | |
| Check status of refund | |
| General information about tax refunds | |
| Review refund FAQs | |
| Other | 4ba |
| | |
| Download a copy of a transcript | |
| Order a transcript in the mail | |

| | |
|---|---|
| Find info about transcripts | |
| Obtain my adjusted gross income (AGI) from a previous year | |
| Obtain my filing status from a previous year | |
| View my current or prior year return | |
| View my balance and payment history | |
| Other | 4ca |
| | |
| Download current year tax forms | |
| Download prior year tax forms | |
| Print current year tax forms | |
| Print prior year tax forms | |
| Better understand tax rules and procedures | |
| Order tax forms | |
| e-file my forms | |
| Find examples of completed forms | |
| **Other** | **4da** |
| | |
| Learn about penalties for individual taxpayers | |
| Learn about penalties for small businesses or corporations | |
| Learn how to avoid a penalty | |

| | |
|---|---|
| Learn how to compute a penalty | |
| Learn about penalty relief criteria | |
| Learn how to request penalty relief | |
| Learn how to appeal a rejected request for penalty relief | |
| Learn about IRA additional tax penalties | |
| See what penalties I owe and/or the amounts due | |
| Make a payment | |
| Other | **4ea** |
| | |
| Employer Identification Number (EIN) | |
| Preparer Tax Identification Number (PTIN) | |
| Electronic Filing Identification Number (EFIN) | |
| Individual Tax Identification Number (ITIN) | |
| FATCA Identification Number (FIN) or FATCA Entity ID | |
| Identity Protection Personal Identification Number (IP PIN) | |
| Other | **4fa** |
| Not sure/don't know | |
| | |
| Have not been in contact with the IRS for this reason | |

| | |
|---|---|
| Received a notice or letter from the IRS | |
| Called the IRS and spoke to a customer service representative | |
| Called the IRS and used the automated phone system to get information | |
| Visited an IRS office (Taxpayer Assistance Center) | |
| Visited IRS.gov | |
| Strongly Disagree | **6a** |
| Disagree | **6a** |
| Neutral | |
| Agree | |
| Strongly Agree | |
| | |
| Strongly Disagree | |
| Disagree | |
| Neutral | |
| Agree | |
| Strongly Agree | |
| Strongly Disagree | |
| Disagree | |
| Neutral | |
| Agree | |
| Strongly Agree | |
| Strongly Disagree | |
| Disagree | |

| | |
|---|---|
| Neutral | |
| Agree | |
| Strongly Agree | |
| I did not have to log in or create an account | |
| I successfully logged in or created an account | **10b** |
| I was unable to log in or create an account | **10a** |
| | |
| Your account | |
| Direct Pay | |
| Where's My Refund | |
| Get Transcript | |
| Other | **10c** |
| | |
| Search engine (such as Google or Bing) brought me to IRS website | |
| Used IRS website search | **11a** |
| Navigated through IRS website menu and/or links | **11c** |
| Typed link directly into the browser or bookmarked link | |
| Other | |

| | |
|---|---|
| I found what I was looking for in the Top Recommendations | |
| Search delivered a helpful set of results | |
| I was able to find what I searched for, but it wasn't easy | **11b** |
| Search did not deliver a helpful set of results | **11b** |
| | |
| I did not encounter any difficulties with site navigation | |
| Navigation got more confusing as I got deeper into the site | |
| Expected links were not present on pages | |
| Links did not take me where I expected | |
| I was unsure where I should be clicking within the site | |
| Encountered technical difficulties (links didn't work, received error messages, etc.) | |
| This is my first time | |
| About once a week or more | |
| About once a month | |
| Every 6 months or less | |
| About once a year | |
| Less than once a year | |

| AP Answer Tag | Required Y/N | Type |
|---|---|---|
| an_individual_taxpayer_myself_my_household_family_member_etc | *Y* | Radio button, one-up vertical |
| a_business_corporation_partnership_small_business_employee_etc | | |
| a_charity_or_non_profit_organization_tax_exempt_entity_government_entity_employee_etc | | |
| a_tax_professional_accountant_attorney_bank_trust_officer_enrolled_agent_tax_consultant_tax_preparer_etc | | |
| other | | |
| | N | Text field,  <100 char |
| standard_1040_filer_wage_salary_receiving_employee | N | Check box, one-up vertical |
| retired | | |
| have_self_employment_income_1099 | | |
| foreign_national_living_in_the_us | | |
| us_taxpayer_living_abroad | | |
| parent_acting_on_behalf_of_a_child | | |
| active_duty_military | | |
| acting_on_behalf_of_a_deceased_person_and_or_estate | | |
| disability_recipients | | |
| other | | |

|  | N | Text field,  <100 char |
|---|---|---|
| | Y | Radio button, one-up vertical |
| _refund_status_or_refund_information_ | | |
| tax_forms_publications_or_instructions | | |
| filing_or_filing_information | | |
| payments_or_balance_info_make_a_payment_payment_agreements_check_balance_find_payment_info_etc | | |
| tax_records_tax_transcript_account_transcript_etc | | |
| other | | |
| tools_for_tax_professionals_eg_e_services | Y | Radio button, one-up vertical |
| free_file_information | | |
| tax_identification_number_ein_ptin_itin_etc | | |
| penalties | | |
| credits_and_deduction_information | | |
| amended_tax_return_status_or_amend_my_previously_filed_return | | |
| identity_theft_fraud_or_scams | | |
| general_tax_information | | |
| other | | |

| | | |
|---|---|---|
| | N | Text field, <100 char |
| make_an_online_payment | Y | Checkbox, one-up vertical |
| seek_information_about_payment_options | | |
| set_up_an_installment_agreement_or_online_payment_agreement | | |
| look_up_modify_or_cancel_an_existing_payment | | |
| look_up_modify_or_cancel_an_existing_payment_agreement | | |
| check_my_account_balance | | |
| view_my_payment_history | | |
| other | | |
| | N | Text field, <100 char |
| check_status_of_refund | Y | Checkbox, one-up vertical |
| general_information_about_tax_refunds | | |
| review_refund_faqs | | |
| other | | |
| | N | Text field, <100 char |
| download_a_copy_of_a_transcript | Y | Checkbox, one-up vertical |
| order_a_transcript_in_the_mail | | |

| | | |
|---|---|---|
| find_info_about_transcripts | | |
| obtain_my_adjusted_gross_income_agi_from_a_previous_year | | |
| obtain_my_filing_status_from_a_previous_year | | |
| view_my_current_or_prior_year_return | | |
| view_my_balance_and_payment_history | | |
| other | | |
| | N | Text field, <100 char |
| download_current_year_tax_forms | Y | Checkbox, one-up vertical |
| download_prior_year_tax_forms | | |
| print_current_year_tax_forms | | |
| print_prior_year_tax_forms | | |
| better_understand_tax_rules_and_procedures | | |
| order_tax_forms | | |
| e_file_my_forms | | |
| find_examples_of_completed_forms | | |
| other | | |
| | N | Text field, <100 char |
| learn_about_penalties_for_individual_taxpayers | Y | Checkbox, one-up vertical |
| learn_about_penalties_for_small_businesses_or_corporations | | |
| learn_how_to_avoid_a_penalty | | |

| | | |
|---|---|---|
| learn_how_to_compute_a_penalty | | |
| learn_about_penalty_relief_criteria | | |
| learn_how_to_request_penalty_relief | | |
| learn_how_to_appeal_a_rejected_request_for_penalty_relief | | |
| learn_about_ira_additional_tax_penalties | | |
| see_what_penalties_i_owe_and_or_the_amounts_due | | |
| make_a_payment | | |
| other | | |
| | N | Text field,  <100 char |
| employer_identification_number_ein | Y | Radio button, one-up vertical |
| preparer_tax_identification_number_ptin | | |
| electronic_filing_identification_number_efin | | |
| individual_tax_identification_number_itin | | |
| fatca_identification_number_fin_or_fatca_entity_id | | |
| identity_protection_personal_identification_number_ip_pin | | |
| other | | |
| not_sure_dont_know | | |
| | N | Text area, <100 characters |
| have_not_been_in_contact_with_the_irs_for_this_reason | N | Checkbox, one-up vertical |

| | | |
|---|---|---|
| received_a_notice_or_letter_from_the_irs | | |
| called_the_irs_and_spoke_to_a_customer_service_representative | | |
| called_the_irs_and_used_the_automated_phone_system_to_get_information | | |
| visited_an_irs_office_taxpayer_assistance_center | | |
| visited_irsgov | | |
| strongly_disagree | Y | Radio button, one-up vertical |
| disagree | | |
| neutral | | |
| agree | | |
| strongly_agree | | |
| | N | Text area, <255 character limit |
| strongly_disagree | Y | Radio button, one-up vertical |
| disagree | | |
| neutral | | |
| agree | | |
| strongly_agree | | |
| strongly_disagree | Y | Radio button, one-up vertical |
| disagree | | |
| neutral | | |
| agree | | |
| strongly_agree | | |
| strongly_disagree | Y | Radio button, one-up vertical |
| disagree | | |

| | | |
|---|---|---|
| neutral | | |
| agree | | |
| strongly_agree | | |
| i_did_not_have_to_log_in_or_create_an_account | N | Radio button, one-up vertical |
| i_successfully_logged_in_or_created_an_account | | |
| i_was_unable_to_log_in_or_create_an_account | | |
| | N | Text area, no character limit |
| your_account | N | Checkbox,  one-up vertical |
| direct_pay | | |
| wheres_my_refund | | |
| get_transcript | | |
| other | | |
| | N | Text area, <100 character limit |
| search_engine_such_as_google_or_bing_brought_me_to_irs_website | N | Checkbox,  one-up vertical |
| used_irs_website_search | | |
| navigated_through_irs_website_menu_and_or_links | | |
| typed_link_directly_into_the_browser_or_bookmarked_link | | |
| other | | |

| | | | |
|---|---|---|---|
| i_found_what_i_was_looking_for_in_the_top_recommendations | | N | Radio button,  one-up vertical |
| search_delivered_a_helpful_set_of_results | | | |
| i_was_able_to_find_what_i_searched_for_but_it_wasn't_easy | | | |
| search_did_not_deliver_a_helpful_set_of_results | | | |
| | | N | **Text area, <100 character limit** |
| i_did_not_encounter_any_difficulties_with_site_navigation | | N | Checkbox,  one-up vertical |
| navigation_got_more_confusing_as_i_got_deeper_into_the_site | | | |
| expected_links_were_not_present_on_pages | | | |
| links_did_not_take_me_where_i_expected | | | |
| i_was_unsure_where_i_should_be_clicking_within_the_site | | | |
| encountered_technical_difficulties_links_didnt_work_received_error_messages_etc | | | |
| this_is_my_first_time | | N | Radio button, one-up vertical |
| about_once_a_week_or_more | | | |
| about_once_a_month | | | |
| every_6_months_or_less | | | |
| about_once_a_year | | | |
| less_than_once_a_year | | | |

| | N | Text area,  no character limit |
| --- | --- | --- |
| | | |

| Special Instructions | CQ Label |
|---|---|
| Skip logic group | 1_Role |
| Skip logic group | 1A_Other Role |
| Skip logic group | 2_Individual Roles |

| Skip logic group | 2A_Other Individual Roles |
|---|---|
| Skip logic group | 3_Reason |
| Skip logic group | 3A_Reason II |

| | |
|---|---|
| Skip logic group | 3B_Other Reason |
| Skip logic group | 4A_Payments |
| Skip logic group | 4AA_Other Payments |
| Skip logic group | 4B_Refund |
| Skip logic group | 4BA_Other Refund |
| Skip logic group | 4C_Transcript |

| | |
|---|---|
| | |
| Skip logic group | 4CA_Other Transcript |
| Skip logic group | 4D_Forms |
| Skip logic group | 4DA_Other Forms |
| Skip logic group | 4E_Penalties |

| | |
|---|---|
| | |
| Skip logic group | 4EA_Other Penalties |
| Skip logic group | 4F_ID Number |
| Skip logic group | 4FA_Other ID Number |
| | 5_Contact |

| | |
|---|---|
| | |
| Skip logic group | 6_Quality |
| Skip logic group | 6A_OE Need |
| | 7_Ease |
| | 8_Efficiency |
| | 9_Confidence |

| | |
|---|---|
| Skip logic group | 10_Login |
| Skip logic group | 10A_OE Login |
| Skip logic group | 10B_Online Tool |
| Skip logic group | 10C_OE Online Tool |
| Skip logic group | 11_Information |

| Skip logic group | 11A_Search |
|---|---|
| Skip logic group | 11B_OE Search Term |
| Skip logic group | 11C_Navigation |
| | 12_Frequency |

| | 13_OE Improvement |
| --- | --- |
| | |

| Model Name | IRS Main Survey V4 |
|---|---|
| Model ID | E1xg4pZdttEcYpQk9wEo5A4C |
| Partitioned | Yes - 2MQ |
| Date | |

| QID | AP Question Tag | Skip From | Question Text |
|---|---|---|---|
| JLB8418Q001 | us_department_of_treasury_irs_q_irs_web_browse_v4_1_role | | I am visiting IRS.gov today as… |
| JLB8418Q002 | us_department_of_treasury_irs_q_irs_web_browse_v4_1a_other_role | 1a | Please specify what best describes your role today: |
| JLB8418Q003 | us_department_of_treasury_ir reasury_ir | 2 | Do any of these situations apply to you? (Select all that apply.) |

| JLB8418Q004 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_2a_ other_indi vidual_rol es | **2a** | Please describe your tax role/situation: |
|---|---|---|---|
| JLB8418Q005 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_3_re ason | | **What was your main reason for visiting** IRS.gov today? |
| JLB8418Q006 | us_depart ment_of_t reasury_ir | 3a | **What was your main reason for visiting** IRS.gov today? |

| | | | |
|---|---|---|---|
| JLB8418Q007 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_3b_ other_rea son | 3b | Please specify other reason for visiting: |
| JLB8418Q008 | us_depart ment_of_t reasury_ir | 4a | Please indicate which specific **payment** tasks describe your visit today. (Select all that apply) |
| JLB8418Q009 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_4aa _other_pa yments | 4aa | Please specify your other payment task: |
| JLB8418Q010 | us_depart ment_of_t reasury_ir | 4b | Please indicate which specific **refund** tasks describe your visit today. (Select all that apply) |
| JLB8418Q011 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_4ba _other_ref und | 4ba | Please specify you other refund task: |
| JLB8418Q012 | us_depart ment_of_t reasury_ir s_q_irs_w | 4c | Please indicate which specific **tax records** tasks describe your visit today. (Select all that apply) |

| | | | |
|---|---|---|---|
| | | | |
| JLB8418Q013 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_4ca _other_tra nscript | 4ca | Please specify your other tax records task: |
| JLB8418Q014 | us_depart ment_of_t reasury_ir s_q_irs_w | 4d | Please indicate which specific **forms, publications or instructions** tasks describe your visit today. (Select all that apply) |
| JLB8418Q015 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_4da _other_for ms | 4da | Please specify your other forms, publications or instructions task: |
| JLB8418Q016 | us_depart ment_of_t reasury_ir | 4e | Please indicate which specific **penalties** tasks describe your visit today. (Select all that apply) |

| | | | |
|---|---|---|---|
| | | | |
| JLB8418Q017 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_4ea _other_pe nalties | 4ea | Please specify your other penalties task: |
| JLB8418Q018 | us_depart ment_of_t reasury_ir | 4f | What type of **identification number** did you want to request or find more information about? |
| JLB8418Q019 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_4fa_ other_id_n umber | 4fa | Please specify what identification number information were looking for: |
| JLB8418Q020 | us_depart ment_of_t reasury_ir s_q_irs_w | | Prior to this visit, what contact have you had with the IRS about your main reason for visiting? (Select all that apply) |

| | | | |
|---|---|---|---|
| JLB8418Q021 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_6_q uality | | Please rate your agreement with the following statements about your visit to IRS.gov today: My need was addressed. |
| JLB8418Q022 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_6a_ oe_need | 6a | Why was your need not addressed?  Please do NOT provide any personal information (name, Social Security number, etc.) in your response. |
| JLB8418Q023 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_7_e ase | | It was easy to complete what I needed to do. |
| JLB8418Q024 | us_depart ment_of_t | | It took a reasonable amount of time to do what I needed to do. |
| JLB8418Q025 | us_depart ment_of_t reasury_ir | | This interaction increased my confidence in the IRS. |

| | | | |
|---|---|---|---|
| JLB8418Q026 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_10_l ogin | | Were you able to log in to (or create an account for) any IRS online tool today? |
| JLB8418Q027 | us_depart ment_of_t reasury_ir s_q_irs_w | 10a | What prevented you from logging into an IRS online tool today? (Please don't provide any personal information in your response) |
| JLB8418Q028 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_10b _online_to ol | 10b | Which IRS online tool(s) did you use today? (Select all that apply) |
| JLB8418Q029 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_10c _oe_onlin e_tool | 10c | Please specify which online tools you used today: |
| JLB8418Q030 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_11_i nformation | | How did you look for information today? (Select all that apply) |

| | | | |
|---|---|---|---|
| JLB8418Q031 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_11a _search | 11a | How was your **search experience** today? |
| JLB8418Q032 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_11b _oe_searc h_term | 11b | What specific search term(s) did you use to find information on IRS.gov? |
| JLB8418Q033 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_11c _navigatio n | 11c | How was your **navigation experience today**? (Select all that apply) |
| JLB8418Q034 | us_depart ment_of_t reasury_ir | | In the past year, about how often did you visit IRS.gov? |

| JLB8418Q035 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_13_ oe_improv ement | | If you could change one thing about this website what would it be? Please do NOT provide any personal information (name, Social Security number, etc.) in your response. |
|---|---|---|---|

| Answer Choices | Skip To |
|---|---|
| An individual taxpayer (myself, my household, family member, etc.) | *2* |
| A business (corporation, partnership, small business, employee, etc.) | |
| A charity or non-profit organization (tax exempt entity, government entity, employee, etc.) | |
| A tax professional (accountant, attorney, bank trust officer, enrolled agent, tax consultant, tax preparer, etc.) | |
| Other | *1a* |
| | |
| Standard 1040 Filer (Wage/salary receiving employee) | |
| Retired | |
| Have self-employment income (1099) | |
| Foreign National Living in the US | |
| US Taxpayer living abroad | |
| Parent acting on behalf of a child | |
| Active duty military | |
| Acting on behalf of a deceased person and/or estate | |
| Disability recipients | |
| Other | *2a* |

| | |
|---|---|
| COVID-19 tax relief or Economic Impact Payments | |
| Tax forms, publications, or instructions | **4d** |
| Refund status or refund information | **4b** |
| Filing or filing information | |
| Payments or balance info (make a payment, payment agreements, check balance, find payment info, etc.) | **4a** |
| Tax records (tax transcript, account transcript, etc.) | **4c** |
| Other | **3a** |
| Tools for tax professionals (e.g., e-services) | |
| Free File information | |
| Tax Identification Number (EIN, PTIN, ITIN, etc.) | **4f** |
| Penalties | **4e** |
| Credits and deduction information | |
| Amended tax return status or amend my previously filed return | |
| Identity theft, fraud, or scams | |
| General tax information | |
| Other | **3b** |

| | |
|---|---|
| | |
| Make an online payment | |
| Seek information about payment options | |
| Set up an installment agreement or online payment agreement | |
| Look-up, modify, or cancel an existing payment | |
| Look-up, modify, or cancel an existing payment agreement | |
| Check my account balance | |
| View my payment history | |
| Other | 4aa |
| | |
| Check status of refund | |
| General information about tax refunds | |
| Review refund FAQs | |
| Other | 4ba |
| | |
| Download a copy of a transcript | |
| Order a transcript in the mail | |

| | |
|---|---|
| Find info about transcripts | |
| Obtain my adjusted gross income (AGI) from a previous year | |
| Obtain my filing status from a previous year | |
| View my current or prior year return | |
| View my balance and payment history | |
| Other | 4ca |
| | |
| Download current year tax forms | |
| Download prior year tax forms | |
| Print current year tax forms | |
| Print prior year tax forms | |
| Better understand tax rules and procedures | |
| Order tax forms | |
| e-file my forms | |
| Find examples of completed forms | |
| Other | **4da** |
| | |
| Learn about penalties for individual taxpayers | |
| Learn about penalties for small businesses or corporations | |
| Learn how to avoid a penalty | |

| | |
|---|---|
| Learn how to compute a penalty | |
| Learn about penalty relief criteria | |
| Learn how to request penalty relief | |
| Learn how to appeal a rejected request for penalty relief | |
| Learn about IRA additional tax penalties | |
| See what penalties I owe and/or the amounts due | |
| Make a payment | |
| Other | **4ea** |
| | |
| Employer Identification Number (EIN) | |
| Preparer Tax Identification Number (PTIN) | |
| Electronic Filing Identification Number (EFIN) | |
| Individual Tax Identification Number (ITIN) | |
| FATCA Identification Number (FIN) or FATCA Entity ID | |
| Identity Protection Personal Identification Number (IP PIN) | |
| Other | **4fa** |
| Not sure/don't know | |
| | |
| Have not been in contact with the IRS for this reason | |

| | |
|---|---|
| Received a notice or letter from the IRS | |
| Called the IRS and spoke to a customer service representative | |
| Called the IRS and used the automated phone system to get information | |
| Visited an IRS office (Taxpayer Assistance Center) | |
| Visited IRS.gov | |
| Strongly Disagree | **6a** |
| Disagree | **6a** |
| Neutral | |
| Agree | |
| Strongly Agree | |
| | |
| Strongly Disagree | |
| Disagree | |
| Neutral | |
| Agree | |
| Strongly Agree | |
| Strongly Disagree | |
| Disagree | |
| Neutral | |
| Agree | |
| Strongly Agree | |
| Strongly Disagree | |
| Disagree | |

| | |
|---|---|
| Neutral | |
| Agree | |
| Strongly Agree | |
| I did not have to log in or create an account | |
| I successfully logged in or created an account | **10b** |
| I was unable to log in or create an account | **10a** |
| | |
| Your account | |
| Direct Pay | |
| Where's My Refund | |
| Get Transcript | |
| Other | **10c** |
| | |
| Search engine (such as Google or Bing) brought me to IRS website | |
| Used IRS website search | **11a** |
| Navigated through IRS website menu and/or links | **11c** |
| Typed link directly into the browser or bookmarked link | |
| Other | |

| | |
|---|---|
| I found what I was looking for in the Top Recommendations | |
| Search delivered a helpful set of results | |
| I was able to find what I searched for, but it wasn't easy | **11b** |
| Search did not deliver a helpful set of results | **11b** |
| | |
| I did not encounter any difficulties with site navigation | |
| Navigation got more confusing as I got deeper into the site | |
| Expected links were not present on pages | |
| Links did not take me where I expected | |
| I was unsure where I should be clicking within the site | |
| Encountered technical difficulties (links didn't work, received error messages, etc.) | |
| This is my first time | |
| About once a week or more | |
| About once a month | |
| Every 6 months or less | |
| About once a year | |
| Less than once a year | |

| AP Answer Tag | Required Y/N | Type |
|---|---|---|
| an_individual_taxpayer_myself_my_household_family_member_etc | Y | Radio button, one-up vertical |
| a_business_corporation_partnership_small_business_employee_etc | | |
| a_charity_or_non_profit_organization_tax_exempt_entity_government_entity_employee_etc | | |
| a_tax_professional_accountant_attorney_bank_trust_officer_enrolled_agent_tax_consultant_tax_preparer_etc | | |
| other | | |
| | N | Text field,  <100 char |
| standard_1040_filer_wage_salary_receiving_employee | N | Check box, one-up vertical |
| retired | | |
| have_self_employment_income_1099 | | |
| foreign_national_living_in_the_us | | |
| us_taxpayer_living_abroad | | |
| parent_acting_on_behalf_of_a_child | | |
| active_duty_military | | |
| acting_on_behalf_of_a_deceased_person_and_or_estate | | |
| disability_recipients | | |
| other | | |

| | N | Text field, <100 char |
|---|---|---|
| | Y | Radio button, one-up vertical |
| tax_forms_publications_or_instructions | | |
| refund_status_or_refund_information | | |
| filing_or_filing_information | | |
| payments_or_balance_info_make_a_payment_payment_agreements_check_balance_find_payment_info_etc | | |
| tax_records_tax_transcript_account_transcript_etc | | |
| other | | |
| tools_for_tax_professionals_eg_e_services | Y | Radio button, one-up vertical |
| free_file_information | | |
| tax_identification_number_ein_ptin_itin_etc | | |
| penalties | | |
| credits_and_deduction_information | | |
| amended_tax_return_status_or_amend_my_previously_filed_return | | |
| identity_theft_fraud_or_scams | | |
| general_tax_information | | |
| other | | |

| | N | Text field,  <100 char |
|---|---|---|
| make_an_online_payment | Y | Checkbox, one-up vertical |
| seek_information_about_payment_options | | |
| set_up_an_installment_agreement_or_online_payment_agreement | | |
| look_up_modify_or_cancel_an_existing_payment | | |
| look_up_modify_or_cancel_an_existing_payment_agreement | | |
| check_my_account_balance | | |
| view_my_payment_history | | |
| other | | |
| | N | Text field,  <100 char |
| check_status_of_refund | Y | Checkbox, one-up vertical |
| general_information_about_tax_refunds | | |
| review_refund_faqs | | |
| other | | |
| | N | Text field,  <100 char |
| download_a_copy_of_a_transcript | Y | Checkbox, one-up vertical |
| order_a_transcript_in_the_mail | | |

| | | |
|---|---|---|
| find_info_about_transcripts | | |
| obtain_my_adjusted_gross_income_agi_from_a_previous_year | | |
| obtain_my_filing_status_from_a_previous_year | | |
| view_my_current_or_prior_year_return | | |
| view_my_balance_and_payment_history | | |
| other | | |
| | N | Text field,  <100 char |
| download_current_year_tax_forms | Y | Checkbox, one-up vertical |
| download_prior_year_tax_forms | | |
| print_current_year_tax_forms | | |
| print_prior_year_tax_forms | | |
| better_understand_tax_rules_and_procedures | | |
| order_tax_forms | | |
| e_file_my_forms | | |
| find_examples_of_completed_forms | | |
| other | | |
| | N | Text field,  <100 char |
| learn_about_penalties_for_individual_taxpayers | Y | Checkbox,  one-up vertical |
| learn_about_penalties_for_small_businesses_or_corporations | | |
| learn_how_to_avoid_a_penalty | | |

| Options | Required | Input Type |
|---|---|---|
| learn_how_to_compute_a_penalty | | |
| learn_about_penalty_relief_criteria | | |
| learn_how_to_request_penalty_relief | | |
| learn_how_to_appeal_a_rejected_request_for_penalty_relief | | |
| learn_about_ira_additional_tax_penalties | | |
| see_what_penalties_i_owe_and_or_the_amounts_due | | |
| make_a_payment | | |
| other | | |
| | N | Text field,  <100 char |
| employer_identification_number_ein | Y | Radio button, one-up vertical |
| preparer_tax_identification_number_ptin | | |
| electronic_filing_identification_number_efin | | |
| individual_tax_identification_number_itin | | |
| fatca_identification_number_fin_or_fatca_entity_id | | |
| identity_protection_personal_identification_number_ip_pin | | |
| other | | |
| not_sure_dont_know | | |
| | N | Text area, <100 characters |
| have_not_been_in_contact_with_the_irs_for_this_reason | N | Checkbox, one-up vertical |

| | | |
|---|---|---|
| received_a_notice_or_letter_from_the_irs | | |
| called_the_irs_and_spoke_to_a_customer_service_representative | | |
| called_the_irs_and_used_the_automated_phone_system_to_get_information | | |
| visited_an_irs_office_taxpayer_assistance_center | | |
| visited_irsgov | | |
| strongly_disagree | Y | Radio button, one-up vertical |
| disagree | | |
| neutral | | |
| agree | | |
| strongly_agree | | |
| | N | Text area, <255 character limit |
| strongly_disagree | Y | Radio button, one-up vertical |
| disagree | | |
| neutral | | |
| agree | | |
| strongly_agree | | |
| strongly_disagree | Y | Radio button, one-up vertical |
| disagree | | |
| neutral | | |
| agree | | |
| strongly_agree | | |
| strongly_disagree | Y | Radio button, one-up vertical |
| disagree | | |

| | | |
|---|---|---|
| neutral | | |
| agree | | |
| strongly_agree | | |
| i_did_not_have_to_log_in_or_create_an_account | N | Radio button, one-up vertical |
| i_successfully_logged_in_or_created_an_account | | |
| i_was_unable_to_log_in_or_create_an_account | | |
| | N | Text area, no character limit |
| your_account | N | Checkbox,  one-up vertical |
| direct_pay | | |
| wheres_my_refund | | |
| get_transcript | | |
| other | | |
| | N | Text area, <100 character limit |
| search_engine_such_as_google_or_bing_brought_me_to_irs_website | N | Checkbox,  one-up vertical |
| used_irs_website_search | | |
| navigated_through_irs_website_menu_and_or_links | | |
| typed_link_directly_into_the_browser_or_bookmarked_link | | |
| other | | |

| | | | |
|---|---|---|---|
| i_found_what_i_was_looking_for_in_the_top_recommendations | N | Radio button,  one-up vertical |
| search_delivered_a_helpful_set_of_results | | |
| i_was_able_to_find_what_i_searched_for_but_it_wasn't_easy | | |
| search_did_not_deliver_a_helpful_set_of_results | | |
| | N | **Text area, <100 character limit** |
| i_did_not_encounter_any_difficulties_with_site_navigation | N | Checkbox,  one-up vertical |
| navigation_got_more_confusing_as_i_got_deeper_into_the_site | | |
| expected_links_were_not_present_on_pages | | |
| links_did_not_take_me_where_i_expected | | |
| i_was_unsure_where_i_should_be_clicking_within_the_site | | |
| encountered_technical_difficulties_links_didnt_work_received_error_messages_etc | | |
| this_is_my_first_time | N | Radio button, one-up vertical |
| about_once_a_week_or_more | | |
| about_once_a_month | | |
| every_6_months_or_less | | |
| about_once_a_year | | |
| less_than_once_a_year | | |

| | N | Text area, no character limit |
| --- | --- | --- |
| | | |

| Special Instructions | CQ Label |
|---|---|
| Skip logic group | 1_Role |
| Skip logic group | 1A_Other Role |
| Skip logic group | 2_Individual Roles |

| Skip logic group | 2A_Other Individual Roles |
|---|---|
| Skip logic group | 3_Reason |
| Skip logic group | 3A_Reason II |

| Skip logic group | 3B_Other Reason |
|---|---|
| Skip logic group | 4A_Payments |
| Skip logic group | 4AA_Other Payments |
| Skip logic group | 4B_Refund |
| Skip logic group | 4BA_Other Refund |
| Skip logic group | 4C_Transcript |

| | |
|---|---|
| | |
| Skip logic group | 4CA_Other Transcript |
| Skip logic group | 4D_Forms |
| Skip logic group | 4DA_Other Forms |
| Skip logic group | 4E_Penalties |

| | |
|---|---|
| | |
| Skip logic group | 4EA_Other Penalties |
| Skip logic group | 4F_ID Number |
| Skip logic group | 4FA_Other ID Number |
| | 5_Contact |

| | |
|---|---|
| | |
| Skip logic group | 6_Quality |
| Skip logic group | 6A_OE Need |
| | 7_Ease |
| | 8_Efficiency |
| | 9_Confidence |

| | |
|---|---|
| Skip logic group | 10_Login |
| Skip logic group | 10A_OE Login |
| Skip logic group | 10B_Online Tool |
| Skip logic group | 10C_OE Online Tool |
| Skip logic group | 11_Information |

| Skip logic group | 11A_Search |
|---|---|
| Skip logic group | 11B_OE Search Term |
| Skip logic group | 11C_Navigation |
| | 12_Frequency |

| | 13_OE Improvement |
|---|---|
| | |

| | | | |
|---|---|---|---|
| **Model Name** | | **IRS Main Survey V4** | |
| **Model ID** | | **E1xg4pZdttEcYpQk9wEo5A4C** | |
| **Partitioned** | | **Yes - 2MQ** | |
| **Date** | | | |

| QID | AP Question Tag | Skip From | Question Text |
|---|---|---|---|
| JLB8418Q001 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_1_ro le | | I am visiting IRS.gov today as… |
| JLB8418Q002 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_1a_ other_role | 1a | Please specify what best describes your role today: |
| JLB8418Q003 | us_depart ment_of_t reasury_ir | 2 | Do any of these situations apply to you? (Select all that apply.) |

| JLB8418Q004 | us_department_of_treasury_irs_q_irs_web_browse_v4_2a_other_individual_roles | 2a | Please describe your tax role/situation: |
|---|---|---|---|
| JLB8418Q005 | us_department_of_treasury_irs_q_irs_web_browse_v4_3_reason | | **What was your main reason for visiting** IRS.gov today? |
| JLB8418Q006 | us_department_of_treasury_ir reasury_ir | 3a | **What was your main reason for visiting** IRS.gov today? |

| JLB8418Q007 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_3b_ other_rea son | 3b | Please specify other reason for visiting: |
|---|---|---|---|
| JLB8418Q008 | us_depart ment_of_t reasury_ir | 4a | Please indicate which specific **payment** tasks describe your visit today. (Select all that apply) |
| JLB8418Q009 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_4aa _other_pa yments | 4aa | Please specify your other payment task: |
| JLB8418Q010 | us_depart ment_of_t reasury_ir | 4b | Please indicate which specific **refund** tasks describe your visit today. (Select all that apply) |
| JLB8418Q011 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_4ba _other_ref und | 4ba | Please specify you other refund task: |
| JLB8418Q012 | us_depart ment_of_t reasury_ir s_q_irs_w | 4c | Please indicate which specific **tax records** tasks describe your visit today. (Select all that apply) |

| JLB8418Q013 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_4ca _other_tra nscript | 4ca | Please specify your other tax records task: |
| JLB8418Q014 | us_depart ment_of_t reasury_ir s_q_irs_w | 4d | Please indicate which specific **forms, publications or instructions** tasks describe your visit today. (Select all that apply) |
| JLB8418Q015 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_4da _other_for ms | 4da | Please specify your other forms, publications or instructions task: |
| JLB8418Q016 | us_depart ment_of_t reasury_ir | 4e | Please indicate which specific **penalties** tasks describe your visit today. (Select all that apply) |

| | | | |
|---|---|---|---|
| | | | |
| JLB8418Q017 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_4ea _other_pe nalties | 4ea | Please specify your other penalties task: |
| JLB8418Q018 | us_depart ment_of_t reasury_ir | 4f | What type of **identification number** did you want to request or find more information about? |
| JLB8418Q019 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_4fa_ other_id_n umber | 4fa | Please specify what identification number information were looking for: |
| JLB8418Q020 | us_depart ment_of_t reasury_ir s_q_irs_w | | Prior to this visit, what contact have you had with the IRS about your main reason for visiting? (Select all that apply) |

| JLB8418Q021 | us_department_of_treasury_irs_q_irs_web_browse_v4_6_quality | | Please rate your agreement with the following statements about your visit to IRS.gov today: My need was addressed. |
|---|---|---|---|
| JLB8418Q022 | us_department_of_treasury_irs_q_irs_web_browse_v4_6a_oe_need | 6a | Why was your need not addressed? |
| JLB8418Q023 | us_department_of_treasury_irs_q_irs_web_browse_v4_7_ease | | It was easy to complete what I needed to do. |
| JLB8418Q024 | us_department_of_t | | It took a reasonable amount of time to do what I needed to do. |
| JLB8418Q025 | us_department_of_treasury_ir | | This interaction increased my confidence in the IRS. |

| JLB8418Q026 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_10_l ogin | | Were you able to log in to (or create an account for) any IRS online tool today? |
|---|---|---|---|
| JLB8418Q027 | us_depart ment_of_t reasury_ir s_q_irs_w | 10a | What prevented you from logging into an IRS online tool today? (Please don't provide any personal information in your response) |
| JLB8418Q028 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_10b _online_to ol | 10b | Which IRS online tool(s) did you use today? (Select all that apply) |
| JLB8418Q029 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_10c _oe_onlin e_tool | 10c | Please specify which online tools you used today: |
| JLB8418Q030 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_11_i nformation | | How did you look for information today? (Select all that apply) |

| JLB8418Q031 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_11a _search | 11a | How was your **search experience** today? |
| JLB8418Q032 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_11b _oe_searc h_term | 11b | What specific search term(s) did you use to find information on IRS.gov? |
| JLB8418Q033 | us_depart ment_of_t reasury_ir s_q_irs_w eb_brows e_v4_11c _navigatio n | 11c | How was your **navigation experience today**? (Select all that apply) |
| JLB8418Q034 | us_depart ment_of_t reasury_ir | | In the past year, about how often did you visit IRS.gov? |

| JLB8418Q035 | us_department_of_treasury_irs_q_irs_web_browse_v4_13_oe_improvement | | If you could change one thing about this website what would it be? |
|---|---|---|---|

| Answer Choices | Skip To |
|---|---|
| An individual taxpayer (myself, my household, family member, etc.) | *2* |
| A business (corporation, partnership, small business, employee, etc.) | |
| A charity or non-profit organization (tax exempt entity, government entity, employee, etc.) | |
| A tax professional (accountant, attorney, bank trust officer, enrolled agent, tax consultant, tax preparer, etc.) | |
| Other | *1a* |
| | |
| Standard 1040 Filer (Wage/salary receiving employee) | |
| Retired | |
| Have self-employment income (1099) | |
| Foreign National Living in the US | |
| US Taxpayer living abroad | |
| Parent acting on behalf of a child | |
| Active duty military | |
| Acting on behalf of a deceased person and/or estate | |
| Disability recipients | |
| Other | *2a* |

| | |
|---|---|
| COVID-19 tax relief or Economic Impact Payments | |
| Tax forms, publications, or instructions | **4d** |
| Refund status or refund information | **4b** |
| Filing or filing information | |
| Payments or balance info (make a payment, payment agreements, check balance, find payment info, etc.) | **4a** |
| Tax records (tax transcript, account transcript, etc.) | **4c** |
| Other | **3a** |
| Tools for tax professionals (e.g., e-services) | |
| Free File information | |
| Tax Identification Number (EIN, PTIN, ITIN, etc.) | **4f** |
| Penalties | **4e** |
| Credits and deduction information | |
| Amended tax return status or amend my previously filed return | |
| Identity theft, fraud, or scams | |
| General tax information | |
| Other | **3b** |

| | |
|---|---|
| | |
| Make an online payment | |
| Seek information about payment options | |
| Set up an installment agreement or online payment agreement | |
| Look-up, modify, or cancel an existing payment | |
| Look-up, modify, or cancel an existing payment agreement | |
| Check my account balance | |
| View my payment history | |
| Other | 4aa |
| | |
| Check status of refund | |
| General information about tax refunds | |
| Review refund FAQs | |
| Other | 4ba |
| | |
| Download a copy of a transcript | |
| Order a transcript in the mail | |

| | |
|---|---|
| Find info about transcripts | |
| Obtain my adjusted gross income (AGI) from a previous year | |
| Obtain my filing status from a previous year | |
| View my current or prior year return | |
| View my balance and payment history | |
| Other | 4ca |
| | |
| Download current year tax forms | |
| Download prior year tax forms | |
| Print current year tax forms | |
| Print prior year tax forms | |
| Better understand tax rules and procedures | |
| Order tax forms | |
| e-file my forms | |
| Find examples of completed forms | |
| Other | **4da** |
| | |
| Learn about penalties for individual taxpayers | |
| Learn about penalties for small businesses or corporations | |
| Learn how to avoid a penalty | |

| | |
|---|---|
| Learn how to compute a penalty | |
| Learn about penalty relief criteria | |
| Learn how to request penalty relief | |
| Learn how to appeal a rejected request for penalty relief | |
| Learn about IRA additional tax penalties | |
| See what penalties I owe and/or the amounts due | |
| Make a payment | |
| Other | **4ea** |
| | |
| Employer Identification Number (EIN) | |
| Preparer Tax Identification Number (PTIN) | |
| Electronic Filing Identification Number (EFIN) | |
| Individual Tax Identification Number (ITIN) | |
| FATCA Identification Number (FIN) or FATCA Entity ID | |
| Identity Protection Personal Identification Number (IP PIN) | |
| Other | **4fa** |
| Not sure/don't know | |
| | |
| Have not been in contact with the IRS for this reason | |

| | |
|---|---|
| Received a notice or letter from the IRS | |
| Called the IRS and spoke to a customer service representative | |
| Called the IRS and used the automated phone system to get information | |
| Visited an IRS office (Taxpayer Assistance Center) | |
| Visited IRS.gov | |
| Strongly Disagree | **6a** |
| Disagree | **6a** |
| Neutral | |
| Agree | |
| Strongly Agree | |
| | |
| Strongly Disagree | |
| Disagree | |
| Neutral | |
| Agree | |
| Strongly Agree | |
| Strongly Disagree | |
| Disagree | |
| Neutral | |
| Agree | |
| Strongly Agree | |
| Strongly Disagree | |
| Disagree | |

| | |
|---|---|
| Neutral | |
| Agree | |
| Strongly Agree | |
| I did not have to log in or create an account | |
| I successfully logged in or created an account | **10b** |
| I was unable to log in or create an account | **10a** |
| | |
| Your account | |
| Direct Pay | |
| Where's My Refund | |
| Get Transcript | |
| Other | **10c** |
| | |
| Search engine (such as Google or Bing) brought me to IRS website | |
| Used IRS website search | **11a** |
| Navigated through IRS website menu and/or links | **11c** |
| Typed link directly into the browser or bookmarked link | |
| Other | |

| | |
|---|---|
| I found what I was looking for in the Top Recommendations | |
| Search delivered a helpful set of results | |
| I was able to find what I searched for, but it wasn't easy | **11b** |
| Search did not deliver a helpful set of results | **11b** |
| | |
| I did not encounter any difficulties with site navigation | |
| Navigation got more confusing as I got deeper into the site | |
| Expected links were not present on pages | |
| Links did not take me where I expected | |
| I was unsure where I should be clicking within the site | |
| Encountered technical difficulties (links didn't work, received error messages, etc.) | |
| This is my first time | |
| About once a week or more | |
| About once a month | |
| Every 6 months or less | |
| About once a year | |
| Less than once a year | |

| AP Answer Tag | Required Y/N | Type |
|---|---|---|
| an_individual_taxpayer_myself_my_household_family_member_etc | *Y* | Radio button, one-up vertical |
| a_business_corporation_partnership_small_business_employee_etc | | |
| a_charity_or_non_profit_organization_tax_exempt_entity_government_entity_employee_etc | | |
| a_tax_professional_accountant_attorney_bank_trust_officer_enrolled_agent_tax_consultant_tax_preparer_etc | | |
| other | | |
| | N | Text field,  <100 char |
| standard_1040_filer_wage_salary_receiving_employee | N | Check box, one-up vertical |
| retired | | |
| have_self_employment_income_1099 | | |
| foreign_national_living_in_the_us | | |
| us_taxpayer_living_abroad | | |
| parent_acting_on_behalf_of_a_child | | |
| active_duty_military | | |
| acting_on_behalf_of_a_deceased_person_and_or_estate | | |
| disability_recipients | | |
| other | | |

| | | |
|---|---|---|
| | N | Text field, <100 char |
| | Y | Radio button, one-up vertical |
| tax_forms_publications_or_instructions | | |
| refund_status_or_refund_information | | |
| filing_or_filing_information | | |
| payments_or_balance_info_make_a_payment_payment_agreements_check_balance_find_payment_info_etc | | |
| tax_records_tax_transcript_account_transcript_etc | | |
| other | | |
| tools_for_tax_professionals_eg_e_services | Y | Radio button, one-up vertical |
| free_file_information | | |
| tax_identification_number_ein_ptin_itin_etc | | |
| penalties | | |
| credits_and_deduction_information | | |
| amended_tax_return_status_or_amend_my_previously_filed_return | | |
| identity_theft_fraud_or_scams | | |
| general_tax_information | | |
| other | | |

| | N | Text field, <100 char |
|---|---|---|
| make_an_online_payment | Y | Checkbox, one-up vertical |
| seek_information_about_payment_options | | |
| set_up_an_installment_agreement_or_online_payment_agreement | | |
| look_up_modify_or_cancel_an_existing_payment | | |
| look_up_modify_or_cancel_an_existing_payment_agreement | | |
| check_my_account_balance | | |
| view_my_payment_history | | |
| other | | |
| | N | Text field, <100 char |
| check_status_of_refund | Y | Checkbox, one-up vertical |
| general_information_about_tax_refunds | | |
| review_refund_faqs | | |
| other | | |
| | N | Text field, <100 char |
| download_a_copy_of_a_transcript | Y | Checkbox, one-up vertical |
| order_a_transcript_in_the_mail | | |

| | | |
|---|---|---|
| find_info_about_transcripts | | |
| obtain_my_adjusted_gross_income_agi_from_a_previous_year | | |
| obtain_my_filing_status_from_a_previous_year | | |
| view_my_current_or_prior_year_return | | |
| view_my_balance_and_payment_history | | |
| other | | |
| | N | Text field, <100 char |
| download_current_year_tax_forms | Y | Checkbox, one-up vertical |
| download_prior_year_tax_forms | | |
| print_current_year_tax_forms | | |
| print_prior_year_tax_forms | | |
| better_understand_tax_rules_and_procedures | | |
| order_tax_forms | | |
| e_file_my_forms | | |
| find_examples_of_completed_forms | | |
| other | | |
| | N | Text field, <100 char |
| learn_about_penalties_for_individual_taxpayers | Y | Checkbox, one-up vertical |
| learn_about_penalties_for_small_businesses_or_corporations | | |
| learn_how_to_avoid_a_penalty | | |

| Options | Required | Input Type |
|---|---|---|
| learn_how_to_compute_a_penalty | | |
| learn_about_penalty_relief_criteria | | |
| learn_how_to_request_penalty_relief | | |
| learn_how_to_appeal_a_rejected_request_for_penalty_relief | | |
| learn_about_ira_additional_tax_penalties | | |
| see_what_penalties_i_owe_and_or_the_amounts_due | | |
| make_a_payment | | |
| other | | |
| | N | Text field, <100 char |
| employer_identification_number_ein | Y | Radio button, one-up vertical |
| preparer_tax_identification_number_ptin | | |
| electronic_filing_identification_number_efin | | |
| individual_tax_identification_number_itin | | |
| fatca_identification_number_fin_or_fatca_entity_id | | |
| identity_protection_personal_identification_number_ip_pin | | |
| other | | |
| not_sure_dont_know | | |
| | N | Text area, <100 characters |
| have_not_been_in_contact_with_the_irs_for_this_reason | N | Checkbox, one-up vertical |

| | | | |
|---|---|---|---|
| received_a_notice_or_letter_fr om_the_irs | | | |
| called_the_irs_and_spoke_to_ a_customer_service_represen tative | | | |
| called_the_irs_and_used_the_ automated_phone_system_to _get_information | | | |
| visited_an_irs_office_taxpayer _assistance_center | | | |
| visited_irsgov | | | |
| strongly_disagree | Y | Radio button, one-up vertical | |
| disagree | | | |
| neutral | | | |
| agree | | | |
| strongly_agree | | | |
| | N | Text area, <255 character limit | |
| strongly_disagree | Y | Radio button, one-up vertical | |
| disagree | | | |
| neutral | | | |
| agree | | | |
| strongly_agree | | | |
| strongly_disagree | Y | Radio button, one-up vertical | |
| disagree | | | |
| neutral | | | |
| agree | | | |
| strongly_agree | | | |
| strongly_disagree | Y | Radio button, one-up vertical | |
| disagree | | | |

| | | |
|---|---|---|
| neutral | | |
| agree | | |
| strongly_agree | | |
| i_did_not_have_to_log_in_or_create_an_account | N | Radio button, one-up vertical |
| i_successfully_logged_in_or_created_an_account | | |
| i_was_unable_to_log_in_or_create_an_account | | |
| | N | Text area, no character limit |
| your_account | N | Checkbox,  one-up vertical |
| direct_pay | | |
| wheres_my_refund | | |
| get_transcript | | |
| other | | |
| | N | Text area, <100 character limit |
| search_engine_such_as_google_or_bing_brought_me_to_irs_website | N | Checkbox,  one-up vertical |
| used_irs_website_search | | |
| navigated_through_irs_website_menu_and_or_links | | |
| typed_link_directly_into_the_browser_or_bookmarked_link | | |
| other | | |

| | | | |
|---|---|---|---|
| i_found_what_i_was_looking_for_in_the_top_recommendations | N | Radio button,  one-up vertical |
| search_delivered_a_helpful_set_of_results | | |
| i_was_able_to_find_what_i_searched_for_but_it_wasn't_easy | | |
| search_did_not_deliver_a_helpful_set_of_results | | |
| | N | **Text area, <100 character limit** |
| i_did_not_encounter_any_difficulties_with_site_navigation | N | Checkbox,  one-up vertical |
| navigation_got_more_confusing_as_i_got_deeper_into_the_site | | |
| expected_links_were_not_present_on_pages | | |
| links_did_not_take_me_where_i_expected | | |
| i_was_unsure_where_i_should_be_clicking_within_the_site | | |
| encountered_technical_difficulties_links_didnt_work_received_error_messages_etc | | |
| this_is_my_first_time | N | Radio button, one-up vertical |
| about_once_a_week_or_more | | |
| about_once_a_month | | |
| every_6_months_or_less | | |
| about_once_a_year | | |
| less_than_once_a_year | | |

| | N | Text area,  no character limit |
|---|---|---|
| | | |

| Special Instructions | CQ Label |
|---|---|
| Skip logic group | 1_Role |
| Skip logic group | 1A_Other Role |
| Skip logic group | 2_Individual Roles |

| | |
|---|---|
| Skip logic group | 2A_Other Individual Roles |
| Skip logic group | 3_Reason |
| Skip logic group | 3A_Reason II |

| | |
|---|---|
| Skip logic group | 3B_Other Reason |
| Skip logic group | 4A_Payments |
| Skip logic group | 4AA_Other Payments |
| Skip logic group | 4B_Refund |
| Skip logic group | 4BA_Other Refund |
| Skip logic group | 4C_Transcript |

| | |
|---|---|
| | |
| Skip logic group | 4CA_Other Transcript |
| Skip logic group | 4D_Forms |
| Skip logic group | 4DA_Other Forms |
| Skip logic group | 4E_Penalties |

| | |
|---|---|
| | |
| Skip logic group | 4EA_Other Penalties |
| Skip logic group | 4F_ID Number |
| Skip logic group | 4FA_Other ID Number |
| | 5_Contact |

| | |
|---|---|
| | |
| Skip logic group | 6_Quality |
| Skip logic group | 6A_OE Need |
| | 7_Ease |
| | 8_Efficiency |
| | 9_Confidence |

| | |
|---|---|
| Skip logic group | 10_Login |
| Skip logic group | 10A_OE Login |
| Skip logic group | 10B_Online Tool |
| Skip logic group | 10C_OE Online Tool |
| Skip logic group | 11_Information |

| Skip logic group | 11A_Search |
|---|---|
| Skip logic group | 11B_OE Search Term |
| Skip logic group | 11C_Navigation |
| | 12_Frequency |

| | 13_OE Improvement |
| --- | --- |
| | |