

English



## Introduction

# Welcome to the IRS Individual Taxpayer Burden Survey

Thank you for taking the time to provide us feedback. This survey is about your 2022 federal income tax return. At any time, you can leave the survey and come back to complete it. The survey will pick up from the last page you completed.

If you have questions about the survey, you can call 240-613-5023 or send an email to [raas.irs.taxpayer.surveys@irs.gov](mailto:raas.irs.taxpayer.surveys@irs.gov). You can find a Frequently Asked Questions (FAQ) document and copy of the full survey in links below. These links will be available throughout the survey.

## Privacy Act and Paperwork Reduction Act Notice for Taxpayer Burden Model Data Collection

Our authority for requesting information with this survey is 5 U.S.C. § 301, and 26 U.S.C. 7801, 7803, and 7805 and the Paperwork Reduction Act. The information you provide allows the IRS to analyze the role of taxpayer burden in tax administration. This information is also used to fulfil the IRS's statutory obligations to the Office of Management and Budget and Congress for information required by the Paperwork Reduction Act, and to provide tax policy analysis support to the Office of Tax Analysis at the Department of the Treasury. This information will also help us to better understand taxpayer needs and burden reduction opportunities. Data collected will be shared with IRS staff, but your responses will be used for research and aggregate reporting purposes only and will not be used for other non-statistical or non-research purposes such as direct enforcement activities. The information that you provide will be protected as required by law. We estimate that it will take 15 to 20 minutes to complete this survey, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Providing the information is voluntary; not providing all or part of the information requested will have no impact on you but may reduce our ability to address taxpayer concerns regarding paperwork reduction. We may not conduct or sponsor, and you are not required to respond to, a collection of information unless it displays a valid OMB control number. The OMB number for this survey is 1545-2212. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden to: IRS, Special Services Section, SE:W:CAR:MP:T:M:S, Room 6129, 1111 Constitution Avenue, NW, Washington, DC 20224.

## General Questions About Your Taxes

At any time, you can leave the survey and come back to complete it. The survey will pick up from the last page you completed.

# General Questions About Your Taxes

The questions below ask about the ways in which you completed your 2022 federal income tax return.

## How did you complete your 2022 federal income tax return?

Select all that apply

- I did it myself using paper forms
- I used a tax preparation website, software, or mobile app (e.g. TurboTax, TaxAct, or H&R Block At Home)
- I had expert assistance from someone such as a paid preparer, a paid professional (e.g., a bookkeeper, enrolled agent, accountant, or lawyer), an employee of my business, or an unpaid volunteer

**Why did you choose this method for completing your 2022 federal income tax return?**

Select all that apply

- Ease of use
- Time
- Familiarity with method
- Cost
- To ensure that my tax return was completed accurately
- To receive all of the deductions, credits, and refunds for which I was qualified
- To reduce the risk of audit
- Other

**Recordkeeping**

## Recordkeeping

The following questions ask about the records, including forms you may have received from your employer or financial institutions, as well as tax-related documents you may have kept in order to prepare your 2022 federal income tax return.

**Whether or not you used them, which of the following types of information did you keep for your 2022 federal income tax return?**

Select all that apply

- Prior year federal income tax returns, including your 2021 Form 1040 federal income tax return**
- Documentation of non-business income**  
*Such as W-2s, interest, dividends, sales of stock, royalties, rental income alimony received, IRA distributions, pension distributions*
- Documentation of non-business income and expenses**  
*Such as educator expenses, moving expenses, alimony paid, home mortgage interest, property taxes, charitable contributions, casualty and theft losses, unreimbursed employee expenses*
- Documentation of business income and expenses**  
*Such as invoices, business bank account statements, partnership or S corporation income, canceled checks, taxes and licenses, advertising costs, depreciation*
- Documentation of credits**  
*Such as the earned income tax credit (EITC), child tax credit, child and dependent care credit, education credit*
- Other tax-related items**

Thinking about all of the records you kept for your 2022 federal income tax return, did you also keep them for other reasons, such as business or personal reasons?

- Yes
- No

Tax Planning

# Tax Planning

The following section asks about any tax-related planning you may have done for your 2022 federal income tax return. Tax planning includes any strategies taxpayers use to reduce the taxes they owe, such as participating in a retirement account, making charitable donations, or buying or selling assets.

**Whether or not you did them, did you consider the tax implications of any of the following as part of your overall planning for your 2022 federal income tax return?**

Select all that apply

- Buying or selling real estate, including purchasing a home to deduct real estate taxes and mortgage interest
- Participating in or maintaining a retirement account such as a 401(k), any type of IRA, or a pension plan
- Investing in non-retirement tax-exempt or tax preferred investments or plans such as tax free bonds or education savings programs
- Buying or selling other investments such as stocks, bonds, or other securities
- Buying or disposing of assets such as equipment or supplies for a business, including any decisions made for section 179 accelerated depreciation expenses
- Structuring your business, such as deciding whether to form a partnership, LLC, or corporation
- Making charitable contributions
- Making energy efficient improvements to your home in order to claim an energy tax credit
- Taking college or other educational classes in order to claim the American opportunity tax credit
- Other
- None of the above

**Completing Your Tax Return**

# Completing Your Tax Return

Which, if any, of the following resources did you use when completing your 2022 federal income tax return?

Select all that apply

- IRS website
- IRS toll free tax assistance line
- IRS walk-in site
- IRS tax forms or publications from a library or post office
- IRS2GO mobile app
- TV, newspapers, or magazines
- Tax preparation website, software, or mobile app
- Internet search engines
- Social media or blogs
- Seminars or classes
- None of the above

Who (if anyone) helped you, however briefly, with your 2022 federal income tax return?

Select all that apply

- My spouse
- Other family members or friends
- Employee of my business
- Tax professional (paid or volunteer)
- Other

- No one helped me

**Which of the following best describes how you used IRS tax form instructions when completing your 2022 federal income tax return?**

- Read most or all instructions
- Read instructions as needed
- Did not read instructions

**If you used a paid or volunteer tax professional, how did you work with them when completing your 2022 federal income tax return?**

Select all that apply

- Did not use a paid or volunteer tax professional
- Completed a tax questionnaire or worksheet for my paid or volunteer professional
- Provided records to my paid or volunteer professional
- Met with my paid or volunteer professional in person
- Communicated with my paid or volunteer professional by telephone or email
- Completed and reviewed my tax return with my paid or volunteer professional
- Other

**If you used a tax preparation website, software, or mobile app to complete your 2022 federal income tax return, which of the following best describes your use of the program?**

- Did not use a tax preparation website, software, or mobile app

- Followed the entire step-by-step computer-guided instructions
- Only used the step-by-step computer-guided instructions to address specific tax areas
- Directly entered information into the tax forms without using the step-by-step computer-guided instructions

**When preparing your 2022 federal income tax return, did you or your preparer electronically import any of the following information so that it did not have to be typed or entered by hand?**

Select all that apply

- Did not electronically import any information
- Data from last year's tax preparation software
- Data from an accounting software package, such as Quicken, MSN Money or QuickBooks
- Data from my W-2s
- Data from my 1098s, 1099s, Schedule K-1s, or other information returns
- Data from my bank, brokerage, or other financial accounts
- Don't know

**Was there anything that made completing your 2022 federal income tax return more difficult than you expected?**

- Yes
- No

Please describe:



## Time Spent of Tax-Related Activities

# Time Spent on Tax-Related Activities

The next questions ask about the time you spent on activities related to the completion of your 2022 federal income tax return.

### Please include time spent:

- On your federal income tax return, including Form 1040, as well as any associated forms, schedules, and worksheets that you completed or filed
- Throughout the tax year as well as the tax filing season
- By your family, friends, or business employees, however briefly
- Traveling to places such as the library, post office, or a tax preparer's office

### Please do NOT include time spent:

- On state or local income tax returns
- On anyone else's federal income tax return
- Responding to IRS notices or correspondence
- Amending your 2022 federal income tax return
- On partnerships (Form 1065), corporations (Form 1120 or 1120S), estates (Form 706), gifts (Form 709), trusts (Form 1041), employment tax (Form 940, 941, 943, 944, 945), or excise tax (Form 720)

**How much time did you spend on the following activities for your 2022 federal income tax return?**

If you're not sure, please provide your best estimate. If you did not spend any time on the activity, enter 0.

Hours

Minutes

**A. Recordkeeping**

*Include time spent throughout the tax year on activities such as:*

- *Keeping track of tax-related information, such as records or receipts*
- *Collecting and organizing your tax-related records*
- *Making a special effort to obtain records or receipts*

*Do not include time spent on non-tax-related business or personal recordkeeping.*

**B. Tax Planning**

*Include time spent throughout the tax year on activities such as:*

- *Calculating or changing withholding or estimated payments*
- *Researching strategies to reduce the taxes you owe such as*
- *making charitable donations, participating in a retirement*
- *account, or buying or selling investments*
- *Working with a tax professional (paid or volunteer) on tax planning*
- *Doing business tax planning related to your personal tax situation*

Hours

Minutes

### C. Gathering or purchasing materials

Include time spent on activities such as:

- *Gathering IRS tax forms, instructions, or publications*
- *Selecting, buying, and installing tax preparation software or mobile app*
- *Selecting a tax preparation website*
- *Selecting a tax professional (paid or volunteer)*

0

0

### D. Completing and submitting your tax return

Include time spent on activities such as:

- *Reading instructions and related materials*
- *Obtaining answers to questions about your return*
- *Completing and reviewing tax forms or worksheets, whether or not they were submitted*
- *Working with a tax professional (paid or volunteer) to complete your tax return*
- *Assembling and submitting your tax return*
- *Checking the status of your electronic submission*
- *Checking that status of your refund*

0

0

You reported spending a total of 0 hours and 0 minutes on activities for your 2022 federal income tax return. Would you like to review your answers?

- Yes, I'd like to review my answers
- No, I'd like to continue to the next question

How much time did you spend on the following activities for your 2022 federal income tax return?

	Hours	Minutes
A. Recordkeeping	<input type="text"/>	<input type="text"/>
B. Tax Planning	<input type="text"/>	<input type="text"/>
C. Gathering or purchasing materials	<input type="text"/>	<input type="text"/>
D. Completing and submitting your tax return	<input type="text"/>	<input type="text"/>

Did you spend any time on any of the following before realizing you did not need to report on them?

Select all that apply

- Itemized deductions
- Child Tax Credit or Additional Child Tax Credit
- Earned Income Tax Credit
- Education deductions or credits
- Credit for the Elderly or the Disabled
- Quarterly estimated taxes
- Unreimbursed business expenses
- Alternative Minimum Tax
- Depreciation or amortization

Other

No

Of the 0 hour(s) and 0 minute(s) you spent completing your tax return, how much of it did you spend on these tax provisions before realizing you did not need to report on them?

If you're not sure, please provide your best estimate.

	Hours	Minutes
Time spent	<input type="text" value="0"/>	<input type="text" value="0"/>

Of the 0 hour(s) and 0 minute(s) you spent completing your tax return, how much of it did you spend on these tax provisions before realizing you did not need to report on them?

If you're not sure, please provide your best estimate.

	Hours	Minutes
Time spent	<input type="text" value="0"/>	<input type="text" value="0"/>

## Costs of Completing Your Tax Return

# Costs of Completing Your Tax Return

The next questions ask about the costs associated with the completion of your 2022 federal income tax return.

**Please include time spent:**

- Associated with your federal income tax return, including Form 1040, as well as any associated forms, schedules, and worksheets that you completed or filed
- Incurred throughout the tax year as well as the tax filing season

**Please do NOT include time spent:**

- On state or local income tax returns
- On anyone else's federal income tax return
- Responding to IRS notices or correspondence
- Amending your 2022 federal income tax return
- On partnerships (Form 1065), corporations (Form 1120 or 1120S), estates (Form 706), gifts (Form 709), trusts (Form 1041), employment tax (Form 940, 941, 943, 944, 945), or excise tax (Form 720)

**How much did you pay for the following products or services to complete your 2022 federal income tax return?**

If you're not sure, please provide your best estimate. If you did not spend any time on the activity, enter 0.

**A. Paid preparer services**

- *Include tax preparation or tax planning advice*

\$

- *Do not include any fees for an early or immediate tax refund*

**B. Tax preparation website or software**

- *Include the purchase price as well as live advice fees*

\$

- *Do not include any fees for an early or immediate tax refund*

- *Do not include any general purpose accounting software, such as Quicken, MSN Money, or QuickBooks*

**C. Fees for an early or immediate tax refund**

- *Include any fees paid for an early or immediate tax refund, such as a refund anticipation loan, check, or rapid refund*

\$

**D. Tax books, Classes, or seminars**

\$

### E. Postage, filing fees, or travel costs

- *Include costs associated with submitting your return, such as electronic filing fees, fees charged for paying your taxes by credit card, postage, faxes, courier fees, or any travel costs*

\$

Total

\$

Paid preparer services are often paid as one fee. We know it may be difficult to separate the cost for your 2022 federal income tax return from additional services provided.

**Were any of the following services included in the cost you reported under paid preparer services?**

Select all that apply

- Did not pay a fee to a paid preparer
- Prepared forms for a partnership, corporation, estate, gift, trust, employment tax, or excise tax
- Electronic filing fees
- Prepared state, local, or city tax return
- Amended previous year tax returns
- Responded to IRS notices or an audit
- Audit protection costs
- Don't know
- None of the above

Tell US About You

## Tell Us About You

For which state(s) did you file a 2022 state income tax return?

**Compared to other taxpayers, how would you rate your knowledge, skills, and abilities in completing your 2022 federal income tax return?**

- Better than most taxpayers
- About the same as most taxpayers
- Not as good as most taxpayers

**What is the highest level of education that you have completed?**

- Less than a high school diploma
- High school graduate or GED
- Some college or some technical school
- Associate's degree or professional certificate
- Bachelor's degree
- Master's or doctorate degree

**Tax forms may be difficult, especially if English is not your primary language. Do you feel that you had any language limitations that made completing your 2022 federal income tax return more difficult?**

- Yes
- No



**When completing your 2022 federal income tax return, how stressful was each of the following?**

Gathering your tax records (e.g., W-2s, expense records)

- Not at all stressful
- A little stressful
- Somewhat stressful
- Very stressful
- I did not do this activity

Selecting or using a tax preparation software

- Not at all stressful
- A little stressful
- Somewhat stressful
- Very stressful
- I did not do this activity

Selecting or working with a tax professional

- Not at all stressful
- A little stressful
- Somewhat stressful
- Very stressful
- I did not do this activity

Understanding IRS forms, instructions, and publications

- Not at all stressful
- A little stressful
- Somewhat stressful
- Very stressful
- I did not do this activity

Filing your return

- Not at all stressful
- A little stressful
- Somewhat stressful
- Very stressful
- I did not do this activity

Wondering if your return will be audited

- Not at all stressful
- A little stressful
- Somewhat stressful
- Very stressful
- I did not do this activity

**The IRS is considering providing a Direct File service that allows taxpayers to prepare and file their federal income tax returns for free directly with the IRS. Would you consider using this service?**

- Yes
- No
- Not sure

**What features would be most important to you when considering whether to use a free IRS Direct File service?**

**Please tell us why you would not use this service.**

**Please share any suggestions you have for how the IRS could improve taxpayer services or make it easier for you to file and pay your taxes.**

## **Finish**

You reported spending a total of 0 hours and 0 minutes on activities for your 2022 federal income tax return. Please click next to proceed.

You have finished the survey.

Please click on the "Next" button on the bottom right to submit your survey.  
Once the survey is submitted, you will not be able to return to the survey.

[FAQ](#)  
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Technical Assistance 1.240.613.5023 or [raas.irs.taxpayer.surveys@irs.gov](mailto:raas.irs.taxpayer.surveys@irs.gov)  
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Español: Form 14231 (SP)(OS) (Rev 03-2023), Catalog Number 71319C OMB No. 1545-2212 Department of the Treasury - Internal Revenue Service

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