

Welcome

Welcome to the IRS Business Taxpayer Burden Survey

Thank you for taking the time to provide us feedback. Please answer all questions with reference to your Tax Year 2022 business 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 need assistance completing this survey, please email us at raas.irs.taxpayer.surveys@irs.gov or call 202-803-9147. 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 the Taxpayer Burden Data Collections

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.

Tax Preparation Methods

Tax Preparation Methods and Activities

This part of the survey asks about your business's tax return preparation methods and activities. Please answer all questions for the 2022 Tax Year.

Which of the following methods did your business use to prepare its 2022 federal income tax return? Include activities done by external service providers as well as those conducted internally.

Select all that apply

- A tax preparer (e.g., accountant, CPA, lawyer, enrolled agent)
- A tax advisory/planning service
- Tax preparation software (e.g. Turbo Tax, CCH, OneSource, CORPTAX, custom software)
- Owners or employees of your business
- Other method

In addition to preparing your business's federal income tax return, which of the following activities did your business engage in (as part of its internal operations rather than as services provided to clients) for the 2022 tax year? Please select the corresponding boxes if the activity was performed by an employee of your business (including owners) and/or an external service provider.

Who performed the following activities?

Select all that apply

Bookkeeping?

- Business employee
- External service provider
- Not applicable

Estimated income tax payments?

- Business employee
- External service provider
- Not applicable

Individual income tax return preparation for owners or partners of your business?

- Business employee
- External service provider
- Not applicable

Pre-tax fringe benefits (e.g., retirement plan health care benefits)?

- Business employee
- External service provider
- Not applicable

Other activities

- Business employee
- External service provider
- Not applicable

Please describe the other activities

Tax-Related Recordkeeping

Tax-Related Recordkeeping

Please think about your business's tax-related recordkeeping activities. This includes all the activities your business did to create, maintain, and store records needed to complete its federal income tax return.

Which of the following statements describe the accounting or bookkeeping system your business used for the 2022 tax year?

Select all that apply

- Used an off-the-shelf accounting and financial software system such as QuickBooks Pro™, Peachtree Complete®, MYOB Business Essentials
- Used general recordkeeping software products such as Microsoft® Office, IBM Notes, OpenOffice

- Maintained a hard-copy ledger to record business transactions
- Used other accounting or bookkeeping systems

Gathering Materials

Gathering Materials, Learning About Tax Law, and Using IRS Taxpayer Services

Consider the tax-related materials your business gathered and how your business learned about tax laws in order to complete its federal income tax return and comply with federal income tax obligations.

For the 2022 tax year, did you or others at your business obtain forms, publications, or other materials from the following?

Select all that apply

- IRS Website
- IRS walk-in office or Taxpayer Assistance Center
- Ordering them from the IRS by mail or telephone
- None of the above

For the 2022 tax year, did you or others at your business:

Select all that apply

- Review IRS tax forms and publications in preparation for completing your business's federal income tax return or in deciding to hire an external service provider
- Attend tax seminars or training to learn about federal income tax issues?
- None of the above

For the 2022 tax year, did you or others at your business interact with the IRS using any of the following channels for reasons OTHER than obtaining forms and publications, filing, or making estimated payments?

Please exclude time spent by any external service providers

Select all that apply

- Obtained e-file assistance from the IRS
- Called the IRS Toll Free Tax Assistance Line
- Went to an IRS walk-in site
- Used the IRS website
- Corresponded with the IRS via e-mail or mail
- None of the above

Total Time Spent (Hours)

Time Spent on Income Tax-Related Activities

Think about all the time your business spent on tax-related recordkeeping, tax planning, gathering tax-related materials, learning about tax law, using IRS or non-IRS resources, completing, reviewing, and submitting your 2022 federal income tax return, and calculating and depositing estimated tax payments.

Please include time spent:

- *On your federal income tax return 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*
- *Corresponding with your external service providers*

Please do NOT include time spent:

- *By your external service providers*
- *On state or local income tax returns*
- *On employment tax returns and payroll activities*
- *On excise tax*
- *On foreign tax*
- *On individual income tax returns for owners, partners, or shareholders*
- *On retirement and pension related activities*

How much TOTAL time did your business spend performing tax reporting compliance-related activities for the 2022 tax year? For example, tax-related recordkeeping, tax planning, gathering tax-related materials, learning about tax law, using IRS or non-IRS resources, completing, reviewing, and submitting your business's 2022 federal income tax return, and calculating and depositing estimated tax payments.

We encourage you to consult your records or others in your business, if necessary. If these resources are unavailable, please provide your most accurate estimate.

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

Time Spent Activities (Hours)

How would you distribute the 0 hours and 0 minutes across each of the following tax related activities?

	Hours	Minutes
A. Tax recordkeeping, including reconciling book and federal tax records?	<input type="text" value="0"/>	<input type="text" value="0"/>
B. Tax planning?	<input type="text" value="0"/>	<input type="text" value="0"/>
C. Gathering materials, learning about tax law, and using IRS or non-IRS resources?	<input type="text" value="0"/>	<input type="text" value="0"/>
D. Calculating and paying federal estimated income tax payments?	<input type="text" value="0"/>	<input type="text" value="0"/>
E. Completing and filing your federal income tax return?	<input type="text" value="0"/>	<input type="text" value="0"/>
F. Other federal income tax-related activities?	<input type="text" value="0"/>	<input type="text" value="0"/>

How much time did your business spend performing each of the tax reporting compliance-related activities listed below?

	Hours	Minutes
A. Tax recordkeeping, including reconciling book and federal tax records?	<input type="text" value="0"/>	<input type="text" value="0"/>
B. Tax planning?	<input type="text" value="0"/>	<input type="text" value="0"/>
C. Gathering materials, learning about tax law, and using IRS or non-IRS resources?	<input type="text" value="0"/>	<input type="text" value="0"/>
D. Calculating and paying federal estimated income tax payments?	<input type="text" value="0"/>	<input type="text" value="0"/>
E. Completing and filing your federal income tax return?	<input type="text" value="0"/>	<input type="text" value="0"/>
F. Other federal income tax-related activities?	<input type="text" value="0"/>	<input type="text" value="0"/>

You reported 0 hours and 0 minutes in other federal income-tax related activities. Please describe those activities

You reported 0 hours and 0 minutes in other federal income-tax related activities.
Please describe those activities

How would you distribute the 0 hours and 0 minutes across each of the different types of individuals listed below?

Please do not include time spent by any external service providers.

	Hours	Minutes
A. Owners or executives?	<input type="text" value="0"/>	<input type="text" value="0"/>
B. In-house professionals or managers?	<input type="text" value="0"/>	<input type="text" value="0"/>
C. Clerical or administrative staff?	<input type="text" value="0"/>	<input type="text" value="0"/>
D. Other types of employees?	<input type="text" value="0"/>	<input type="text" value="0"/>

How would you distribute 0 hours and 0 minutes across each of the different types of individuals listed below?

Please do not include time spent by any external service providers.

	Hours	Minutes
A. Owners or executives?	<input type="text" value="0"/>	<input type="text" value="0"/>
B. In-house professionals or managers?	<input type="text" value="0"/>	<input type="text" value="0"/>
C. Clerical or administrative staff?	<input type="text" value="0"/>	<input type="text" value="0"/>

Hours

Minutes

D. Other types of employees?

You reported 0 hours and 0 minutes of work performed by other types of employees. Please describe those employees.

You reported 0 hours and 0 minutes of work performed by other types of employees. Please describe those employees.

What is the average hourly pay rate for each of the different types of individuals listed below who are responsible for federal income tax-related activities?

Please do not include benefits or overhead. If you're not sure what the average hourly pay rate was, please provide your best estimate.

Hourly Pay

Owners or Executives

\$ In-house
professionals or
manager\$ Clerical or
administrative staff\$

Hourly Pay

Other types of
employees\$

What is the average hourly pay rate for all individuals in your business who are responsible for federal income tax-related activities?

Please do not include benefits or overhead. If you're not sure what the average hourly pay rate was, please provide your best estimate.

\$

What is the average hourly pay rate for all individuals in your business who are responsible for federal income tax-related activities?

Please do not include benefits or overhead. If you're not sure what the average hourly pay rate was, please provide your best estimate.

\$

Fees

Costs Associated With Tax Compliance

Please think about how much money your business spent to comply with its tax obligations. Costs associated with tax compliance are a very important part of assessing burden, so please provide the most accurate estimate you can.

What are the total fees paid to external service providers for tax and tax-related services? If you did not pay an external service provider for services enter zero.

\$

Of the \$\$ $\{q://QID33/ChoiceTextEntryValue\}$ in fees paid to external service providers, how much was spent *exclusively* for federal income tax planning?

\$

Of the \$\$ $\{q://QID33/ChoiceTextEntryValue\}$ in fees paid to external service providers, how much was spent *exclusively* for federal income tax return preparation?

\$

How much money did your business spend on tax-specific software for the 2022 tax year? If you did not spend any money on tax-specific software, enter zero.

Note: Include the costs of the software plus any costs incurred for maintenance and updates.

\$

How much money was spent on other business-related federal tax activities for the 2022 tax year? This may include money spent on electronic submission, photocopies, tax research services, tax publications and

journals, transportation, postage, or IRS user fees. If you did not spend any money on other-business-related federal tax activities, enter zero.

Note: Do NOT include money your business spent on external service provider(s), tax software, or employee compensation.

\$

Of these other business-related tax activities, how much was spent exclusively for your business's most recent federal income tax return?

\$

Additional Questions

Additional Questions

How many 2022 state income tax returns did your business file?

On average, how many full-time and part-time employees, if any, did your business have during the 2022 tax year? Please include partners or owners for this purpose, but do not include any contractors. If you're not sure, please provide your best estimate.

How many full-time employees?

How many part-time employees?

Block 11

DO NOT HIT SUBMIT DURING TESTING PHASE

You have finished the survey.

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

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

[Frequently Asked Questions FAQ](#)
[Business Taxpayer Burden Survey Preview](#)

Technical Assistance 1.202.803.9147 or raas.irs.taxpayer.surveys@irs.gov

Form 14296-A (OS) (Rev 04-2023), Catalog Number 62915E OMB No. 1545-2212 Department of the Treasury - Internal Revenue Service

Powered by Qualtrics

Sample