

## Introduction

# Welcome to the IRS Business Compliance Burden Survey

Thank you for taking the time to provide us feedback. Please answer all questions with reference to federal income tax return post-filing activities conducted in Tax Year  $\{e://Field/Year\}$ . 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 the survey, please email us at [raas.irs.taxpayer.surveys@irs.gov](mailto:raas.irs.taxpayer.surveys@irs.gov) or call 202-803-9833. 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 Survey 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 10 to 15 minutes to complete this survey, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Providing the information is voluntary; not providing all or part of the information requested will have no impact on you but may reduce our ability to address taxpayer concerns regarding paperwork reduction. We may not conduct or sponsor, and you are not required to respond to, a collection of information unless it displays a valid OMB control number. The OMB number for this survey is 1545-2212. 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.

## Post-Filing Activities

# Post-Filing Activities

After you filed your business's  $\{e://Field/Year\}$  federal income tax return, did you...

Select all that apply

- Receive an IRS notice about an issue with your business's  $\{e://Field/Year\}$  federal income tax return?
- File an amended  $\{e://Field/Year\}$  federal income tax return?
- Do something else?

What post-filing actions did your business take for its  $\{e://Field/Year\}$  federal income tax return?

Select all that apply

- Worked with an external service provider*
- Amended any federal income tax return(s)*
- Made a claim for a refund*
- Made payment(s) to the IRS*
- Made a request for an abatement*
- Provided the IRS with financial information*
- Appealed an IRS decision*

Other post-filing action(s)

For  $\{e://Field/Year\}$  federal income tax return post-filing activities, did your business review or gather...

Select all that apply

- Federal income tax return(s), including your business's  $\{e://Field/Year\}$  federal income tax return?
- Documentation of business income (e.g., invoices bank records, or brokerage statements)?
- Documentation for business deductions (e.g., advertising, meals and entertainment, legal and professional services, general office expenses, depreciation, taxes and licenses, net operating losses, or passive activity losses)?
- Documentation for business credits (e.g., the Research Credit, Investment Credit, Disabled Access Credit, Alternative Motor Vehicle Credit, Small Employer Pension Plan Credit, or Work Opportunity Credit)?
- Other tax-related information?

Did you do any of the following while resolving your business's post-filing activities?

Select all that apply

- Called the IRS
- Mailed, faxed or emailed a letter and/or tax-related documents to the IRS
- Met with an IRS employee

- Searched IRS.gov
- Obtained IRS forms and publications
- Visited a local IRS office
- Other

### **Time Spent on Post-Filing Activities**

# **Time Spent on Post-Filing Activities**

Think about all the time spent by your business's owners and employees on its  $\{e://Field/Year\}$  federal income tax return post-filing activities.

Please include time spent:

- Amending a federal income tax return
- Responding to an IRS notice about an already-filed federal income tax return
- Resolving an issue with an already-filed federal income tax return
- Interacting with IRS, including "active waiting" time such as being placed on hold during a phone call or waiting to meet with IRS personnel

Please do NOT include time spent:

- By an external service provider, because those costs will be considered later
- Waiting on the IRS or an external service provider to respond to you
- Filing federal income tax returns not related to post-filing activities
- Filing any state income tax return(s) or resolving issues with any state return(s)

**How much time was spent by your business's owners and employees on its  $\{e://Field/Year\}$  federal income tax return post-filing activities?**

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

Time spent

Hours

0

Minutes

0

### *Costs Associated with Post-Filing Activities*

## Cost Associated with Post-Filing Activities

Think about the money spent by your business on its  $\{e://Field/Year\}$  federal income tax return post-filing activities. Costs associated with resolving post-filing activities are a very important part of assessing burden. If you're not sure how much money was spent, please provide your best estimate. If you did not spend any money on the activity, enter 0.

Note: Do not include any tax, penalties, and/or interest payments related to your post-filing activities.

### How much was spent on...

A. Fees paid to external service providers for services such as responding to notices, representing your business before the IRS, and amending your business's tax return?

\$

B. Non-labor items(e.g., paper, postage, equipment, transportation, photocopies, tax literature)?

\$

*State and Local Income Tax Returns*

## State and Local Income Tax Returns

As a result of your business's  $\{e://Field/Year\}$  federal income tax return post-filing activities, how many state and local income tax returns from any year did your business amend? If you did not amend any state or local income tax returns, enter 0.

*Demographics*

## Demographics

On average how many full-time and part-time employees and contractors did your business have during Calendar Year 2022?

If you're not sure, please provide your best estimate. If you did not have any employees in that category, enter 0.

Full-time employees

Part-time employees

Independent contractors

*Improving the Business Compliance Burden Process*

## Improving the Business Compliance Burden Process

How helpful would your company find the following services or features?

**Earlier notification that there's an issue with a return**

- Not at all helpful*
- A little helpful*
- Somewhat helpful*
- Very helpful*
- Don't know*

**Fast track procedures to quickly resolve issues**

- Not at all helpful*
- A little helpful*
- Somewhat helpful*
- Very helpful*
- Don't know*

**Ability to meet with IRS personnel via video conference**

- Not at all helpful*
- A little helpful*
- Somewhat helpful*
- Very helpful*
- Don't know*

**Ability to upload documentation via a secure online account**

- Not at all helpful*

- A little helpful*
- Somewhat helpful*
- Very helpful*
- Don't know*

***Improving the Business Compliance Burden Process***

**What do businesses like yours find to be the most difficult part of amending or resolving issues with an already-filed federal income tax return?**

**Please describe below any suggestions you have for how the IRS could improve taxpayer services or reduce the compliance burden associated with amending or resolving issues with an already-filed return.**

***End of Survey***

*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.

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

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Technical Assistance 1.202.803.9833 or [raas.irs.taxpayer.surveys@irs.gov](mailto:raas.irs.taxpayer.surveys@irs.gov)

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