



Taxpayer Compliance Burden Survey

Internal Revenue Service

sample

Your experience matters to us.

TCB

Want to take the
survey on the web?

See the back cover
for instructions.

Taxpayer Compliance Burden Survey

Frequently Asked Questions

This survey is about your <<YEAR>> amended federal income tax return

What's this survey about?

The purpose of this survey is to provide the Internal Revenue Service (IRS) with accurate estimates of the time and money you, your spouse (if you filed jointly), family members, friends, or other unpaid volunteers spent to amend your already-filed federal income tax return.

We won't ask you about specific income or other financial information.

How will my answers be used?

We'll use your responses for research purposes only. Your responses will help us understand the amount of time and money taxpayers spend amending their income tax return. Participation is voluntary, but the information you provide will ensure that experiences like yours are represented.

Who should complete this survey?

You or your spouse (if you filed jointly) should complete it. You may need to ask others who helped you amend your federal income tax return for input.

Should I send this to my tax professional?

No, this survey is about the time and money that **you** spent, not your tax professional.

How long will this survey take?

This survey should take about 10 to 15 minutes to complete.

Who can I contact with questions or concerns about the survey?

If you have questions about the content of this survey, please contact Willow Burns at Westat at 855-847-2874, or email IRS-TCBSurvey@westat.com. If you would like to contact someone at the IRS, please email Clara Gant at Clara.L.Gant@irs.gov.

To read the official IRS announcement about this survey, please visit www.irs.gov/statistics/2019a-taxpayer-compliance-burden-survey.

Si desea contestar la encuesta en español, por favor vaya a la contraportada para ver las instrucciones de cómo contestar la encuesta por Internet. Si tiene alguna dificultad técnica, puede llamarnos al 855-847-2874 o enviarnos un correo electrónico a IRS-TCBSurvey@westat.com.



This survey is about your <<YEAR>> amended federal income tax return

Instructions:

Please use a black or blue pen.

Mark to indicate your answer.

If you want to change your answer, darken the box and mark the correct answer.

Reason for Amending Your Federal Income Tax Return

1. Why did you amend your federal income tax return?

Mark all that apply.

- Received a new information return (such as W-2, 1099) after filing my federal income tax return
- Realized I made a mistake on my federal income tax return
- Received a notice about a different year's federal income tax return
- My preparer told me I needed to file an amended return
- Other, *please describe:*

Sample



Reviewing and Gathering Tax-Related Materials

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2. **Whether or not you used them**, which of the following types of information did you review or gather to amend your federal income tax return?

Mark all that apply.

- The federal income tax return I amended
Such as forms 1040, 1040A, or 1040EZ
- Federal income tax returns from other years
Such as forms 1040, 1040A, or 1040EZ from other tax years
- Documentation of nonbusiness income
Such as W-2s, interest, dividends, sales of stock, royalties, rental income, alimony received, IRA distributions, pension distributions
- Documentation of nonbusiness deductions
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, cancelled 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, *please describe:*

Sample



Actions Taken to Amend Your Federal Income Tax Return

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3. Which of the following did you do while amending your federal income tax return?

Mark all that apply.

- Called the IRS to get answers to tax questions
- Got IRS forms and publications
- Searched irs.gov
- Searched a non-IRS website
- Consulted with friends or family members
- Consulted with a paid or volunteer tax professional
- Contacted the IRS by phone or internet to confirm they received my amended return
- Other, *please describe:*

- Not applicable or none of the above



Working with a Tax Professional

This survey is about your <<YEAR>> amended federal income tax return

4. Which of the following describes the paid or volunteer tax professional you used to amend your federal income tax return?

Mark only one.

- Worked with the same tax professional that prepared my federal income tax return
- Worked with a different tax professional from the same firm or company that prepared my federal income tax return
- Worked with a tax professional from a different firm or company than the one that prepared my federal income tax return
- Didn't work with a tax professional to amend my federal income tax return → [GO TO PAGE 6](#)

5. Which of the following describes why you used a tax professional to amend your federal income tax return?

Mark all that apply.

- Was unsure of how to proceed
- Use a tax professional for all tax matters
- Didn't have time to amend the return on my own
- The issue seemed too complex to resolve on my own
- Attempted to amend the return on my own, but later decided to seek professional tax help
- Other, *please describe:*



6. Which of the following best describes your tax professional's fee for helping you amend your federal income tax return?

Mark all that apply.

- Flat fee
- Hourly rate
- Service was included with the preparation of my federal income tax return
- Free services (Such as low income tax clinic or volunteer tax professional), please describe:

- Other, please describe:

- Don't know

Sample



Time Spent Amending Your Federal Income Tax Return

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The next questions focus on the time you, your family members, friends, or other unpaid volunteers spent amending your federal income tax return.

Please include time spent:

- By you, your family members, friends, or other unpaid volunteers actively working to amend your federal income tax return

Please do NOT include time spent:

- Waiting on the IRS or your tax professional to respond to you
- Filing federal income tax returns not required to amend your federal income tax return
- Filing any state income tax returns
- By a paid tax professional who may have helped you amend your federal income tax return

7. How much time did you spend on the following activities for your amended federal income tax return? If you're not sure, please provide an estimate.

A. Reviewing and gathering tax-related materials

Include time spent on activities such as:

- Reading instructions or publications
- Reviewing your federal income tax returns
- Consulting with family members or friends
- Obtaining or recreating tax-related documentation
- Copying, printing, or scanning tax-related documents

			:		
Hours				Minutes	

No time spent

B. Interacting with the IRS

Include time spent on activities such as:

- On the telephone with IRS employees
- Visiting a local IRS office (include travel time)
- Searching irs.gov
- Completing and submitting tax forms or documentation
- Making a payment based on your amended federal income tax return

			:		
Hours				Minutes	

No time spent

C. Working with a tax professional

Include time spent on activities such as:

- Searching for and selecting your tax professional
- Meeting face to face with your tax professional (include travel time)
- Telephone calls with your tax professional
- Exchanging emails with your tax professional

			:		
Hours				Minutes	

No time spent

Did not use a tax professional

D. Other, please describe:

			:		
Hours				Minutes	

No time spent



Costs Associated with Amending Your Federal Income Tax Return

This survey is about your <<YEAR>> amended federal income tax return

The next questions ask about the costs associated with amending your federal income tax return.

Please include costs associated with:

- Money you spent while actively working to amend your federal income tax return

Please do **NOT** include costs associated with:

- Any tax, penalties, and interest related to your post-filing issue
- Filing any federal or state income tax returns not required to amend your federal income tax return

8. How much did you pay for the following products or services to amend your federal income tax return? If you're not sure, please provide an estimate.

A. Paid tax preparation and advice

Include money paid to a tax professional or to purchase tax software specifically to amend your federal income tax return

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Dollars **Cents**

- No money spent
- Did not use a tax professional

B. Postage, travel, and other related costs

Include money paid for:

- Postage, envelopes, and other mail-related costs
- Copying, faxing, or scanning of documents
- Travel related to amending your federal income tax return
- Other products and services necessary to amend your federal income tax return

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Dollars **Cents**

- No money spent

Do NOT include costs of tax, penalties, and interest.

C. Other, please describe:

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Dollars **Cents**

- No money spent



Your Experience Amending Your Federal Income Tax Return

This survey is about your <<YEAR>> amended federal income tax return

9. When amending your federal income tax return, how stressful was each of the following?

	Not at all stressful	A little stressful	Somewhat stressful	Very stressful	I did not do this activity
A. Finding out what to do next	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. Finding the forms you needed to amend your return	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C. Finding out where to send your amended return	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D. Finding out whether the IRS had received your amended return	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E. Worrying about penalties for underpayment of tax	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
F. Taking time off from your job	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

10. The IRS now offers taxpayers the option of creating an online account. Which of the following features would you find most useful?

Mark all that apply.

- Personal profile that allows the IRS to send you information tailored to your tax filing situation
- Ability to customize information on the IRS website that meets your interests
- Access to prior-year tax returns
- Online payment options
- Access to tax payment history
- Ability to upload supporting documentation when you file your return or respond to an IRS notice
- Immediate error check when you file your taxes online
- Other, *please describe:*



11. Please suggest how the IRS could improve taxpayer services or reduce the compliance burden of amending your federal income tax return.

12. What was the most difficult part of amending your federal income tax return?

Thank you for completing our survey.

Privacy Act and Paperwork Reduction Act Notice for IRS Taxpayer Burden Surveys 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' 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 10-15 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.

Web Survey Instructions

If you prefer, you can complete this survey on the web. Please follow the instructions below. Web responses are processed more quickly, and you won't receive follow-up mail.

1 Go to the website.

Visit www.IRS-TCBSurvey.org to take the secure online survey.

2 Log in.

Use this PIN to access the survey: [PIN]

Problems?

If you have any technical difficulties, including problems with the website, please call 855-847-2874 or send an email to IRS-TCBSurvey@westat.com.

Instrucciones de la encuesta web

Si prefiere contestar la encuesta por Internet, puede hacerlo siguiendo las instrucciones a continuación. Las respuestas en Internet se procesan más rápido y ayudarán a asegurar que usted no reciba más comunicados.

1 Vaya a la página de Internet.

Para realizar la encuesta segura en línea visite: www.IRS-TCBSurvey.org

2 Ingrese a la encuesta.

Necesitará el siguiente PIN para acceder a la encuesta: [PIN]

¿Dificultades?

Si tiene alguna dificultad técnica, incluyendo problemas con la página de Internet, puede llamarnos al 855-847-2874 o enviarnos un correo electrónico a IRS-TCBSurvey@westat.com.

