Taxpayer Compliance Burden Survey

Internal Revenue Service

Your experience matters to us.

TCB

Want to take the survey on the web?

See the back cover for instructions.

Frequently Asked Questions

Why did I receive the Taxpayer Compliance Burden Survey?

You were randomly selected to complete this survey because IRS would like to learn about the experience of taxpayers who have filed a return after the due date of the return.

What is this survey about?

The purpose of this survey is to provide the Internal Revenue Service (IRS) with accurate estimates of the time and money spent by you or your spouse (if you filed jointly), family members, friends, or other unpaid volunteers to resolve an issue with a late-filed return.

Please be assured that you will not be asked about specific income or other financial information.

How will my answers be used?

All information you provide will be used for research purposes only. Participation is voluntary, but the information you provide will ensure that experiences like yours are represented.

Who should complete this survey?

This survey should be completed by you or your spouse (if you filed jointly), but may require help from those who have assisted you in resolving your federal income tax filing issue. By completing the survey, the IRS can use your responses to help better understand the amount of time and money taxpayers spend resolving issues related to late-filed returns.

Should I send this to my tax professional?

No, please do not send this to your tax professional, if you have one, because this survey concerns time and costs spent by you not your tax professional.

How long will this survey take?

We expect that this survey will take about 10 to 15 minutes to complete.

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

For questions about the content of this survey:

- Please contact Sushama Rajapaksa at Westat by phone at 1-855-737-4070 or send an email to TCB-B@westat.com.

To contact the IRS about the survey:

- Please call Sarah Shipley at 206-946-3516 or send an email to Sarah.P.Shipley@irs.gov

Instructions:

Please use a black or blue pen to complete this form.

Mark ☒ to indicate your answer.

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

Si usted desea contestar esta encuesta en español, por favor llame al 1-855-737-4070 o envíe un correo electrónico a TCB-B@westat.com.

Section A. General Questions About Your Tax Year 20XX Filing Issue

1. What reason best describes why you filed your Tax Year 20XX federal income tax return after the due date of the return? **Check only one.**

- ☐ Did not know I had to file
- ☐ Someone told me I didn't have to file
- ☐ There was a balance due on the return
- ☐ Didn't understand how to complete the return
- ☐ Other, *please specify:*
- ☐ Software or paid preparer too expensive
- ☐ Didn't have all of the tax documents I needed
- ☐ Personal reasons (illness, death in the family, too busy)

2. What prompted you to file your Tax Year 20 federal income tax return? **Check all that apply.**

- ☐ To get my refund
- ☐ Found out I had to file
- ☐ To show IRS that I owed less than they said I did
- ☐ Received the tax documents I needed
- ☐ Other, *please specify:*
- ☐ Able to get help to complete the return
- ☐ Had enough time to prepare the return
- ☐ Had enough money to pay the balance due

3. What did you do when you received the first IRS notice about your Tax Year 20XX federal income tax filing issue? **Check all that apply.**

- ☐ Did not receive an IRS notice
- ☐ Did not think it was important, so I did nothing
- ☐ Did not understand the notice, so I did nothing
- ☐ Other, *please specify:*
- ☐ Took the notice to a paid or volunteer tax professional
- ☐ Did not open the first IRS notice, but did open a subsequent notice

4. What did you do to learn more about filing your Tax Year 20XX federal income tax return? **Check all that apply.**

- ☐ Searched a non-IRS website
- ☐ Consulted with a paid or volunteer tax professional
- ☐ Consulted with friends or family members
- ☐ Other, *please specify:*
- ☐ Contacted the IRS
- ☐ Searched IRS.gov
- ☐ Visited a local IRS office

☐ None of the above

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Section B. Time Spent Resolving Your Tax Year 20XX Return Filing Issue

The next questions focus on the time spent by you, family members, friends, or other unpaid volunteers on activities related to resolving your Tax Year 20XX federal income tax filing issue.

Please include time spent:

- *By you, family members, friends, or other unpaid volunteers actively working to resolve your filing issue*

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 resolve your filing issue*
- *Filing any state income tax returns*
- *By a paid tax professional who may have helped you resolve your filing issue*

5. Of the total time you spent resolving your Tax Year 20XX federal income tax filing issue...

A. How much time did you spend reviewing and gathering tax-related materials?
Include time spent:

- *Reading IRS notices, instructions, or publications*
- *Performing tax-related calculations*
- *Consulting with family members or friends*
- *Researching to learn more about the issue*
- *Obtaining or recreating tax-related documentation*
- *Taking time off from your job to review and gather tax-related materials*
- *Copying, printing, or scanning tax-related documents*

☐☐☐ : ☐☐
Hours **Minutes**

☐ No time spent

B. How much time did you spend interacting with the IRS and IRS resources?
Include time spent:

- *On the telephone or in face-to-face meetings with IRS personnel*
- *Visiting a local IRS office (include travel time)*
- *Taking time off from your job to interact with the IRS*
- *Writing and submitting a letter to the IRS*
- *Searching IRS.gov*
- *Obtaining IRS forms, instructions, or publications*
- *Completing and submitting IRS forms*
- *Making payments to the IRS*

☐☐☐ : ☐☐
Hours **Minutes**

☐ No time spent

C. How much time did you spend working with a tax professional?
Include time spent:

- *Searching for and selecting a tax professional*
- *Discussing fees and payment with a tax professional*
- *Submitting tax-related documentation to a tax professional*
- *Completing any forms at the request of a tax professional*
- *In face-to-face meetings with a tax professional (include travel time)*
- *Taking time off from a job to work with a tax professional*
- *On the telephone or exchanging email with a tax professional*

☐☐☐ : ☐☐
Hours **Minutes**

☐ No time spent

☐ Not applicable

Section C. Money Spent Resolving Your Tax Year 20XX Return Filing Issue

The next questions ask about the money you spent to resolve your Tax Year 20XX federal income tax filing issue.

Please include:

- *Money spent by you while actively working to resolve your filing issue*

Please do not include:

- *Any tax, penalties, and interest related to your filing issue*
- *Costs related to filing any federal or state income tax returns not required to resolve your 20XX filing issue*

6. Of the total money you spent resolving your Tax Year 20XX federal income tax filing issue...

A. How much did you spend on tax professional fees to resolve your filing issue?
Include money paid:

- *To a tax professional, at any point, to assist you in resolving your filing issue*

$ ☐☐☐☐☐ . ☐☐
Dollars Cents

☐ No money spent

☐ Not applicable

B. How much did you spend on a tax preparation website or software to resolve your filing issue?
Include the purchase price as well as live advice fees.

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

$ ☐☐☐☐☐ . ☐☐
Dollars Cents

☐ No money spent

C. How much did you spend on postage or other related costs to resolve your filing issue?
Include money paid other than tax, penalties, and interest:

- *For postage, envelopes, and other mail-related costs*
- *For copying, faxing, or scanning of documents*
- *For travel and commuting related to resolving your filing issue*
- *For any other products and services necessary to resolve your filing issue*

$ ☐☐☐☐☐ . ☐☐
Dollars Cents

☐ No money spent

D. How much did you spend on fees to resolve your filing issue, such as a credit card processing fee or an offer-in-compromise application fee?
*Do **not** include tax, penalties, or interest.*

$ ☐☐☐☐☐ . ☐☐
Dollars Cents

☐ No money spent

Section D. Your Experience Resolving Your Tax Year 20XX Filing Issue

7. When resolving your Tax Year 20XX federal income tax filing issue, how stressful was each of the following?

	Not at all stressful	A little stressful	Somewhat stressful	Very stressful	Did not do
A. Figuring out what to do next	☐	☐	☐	☐	☐
B. Figuring out what would happen if you didn't respond	☐	☐	☐	☐	☐
C. Trying to understand IRS notices	☐	☐	☐	☐	☐
D. Calling the IRS	☐	☐	☐	☐	☐
E. Responding to the IRS in writing	☐	☐	☐	☐	☐
F. Finding the tax information you need to complete your return	☐	☐	☐	☐	☐
G. Finding out about payment options	☐	☐	☐	☐	☐

When resolving your Tax Year 20XX federal income tax filing issue, how stressful was the following?

	Not at all stressful	A little stressful	Somewhat stressful	Very stressful
H. Overall experience resolving this filing issue	☐	☐	☐	☐

8. If there had been other ways to provide information to the IRS or find out about the status of your 20XX filing issue, which method(s) would you have used?

Check all that apply.

☐ Email
☐ Secure online taxpayer account
☐ Text messaging
☐ Other, *please specify:*

9. Please share any suggestions you have for how the IRS could improve taxpayer services or make it easier for you to know when you should file a federal income tax return and what payment options are available.

Privacy and Paperwork Reduction Act Notice for Taxpayer Compliance Burden Survey

The Privacy Act of 1974 states that when we ask you for information, we must first tell you our legal right to ask for the information, why we are asking for it, and how it will be used. We must also tell you what could happen if you do not provide it and whether or not you must respond under the law.

Our legal right to ask for this information is 5 U.S.C. 301.

The primary purpose for requesting the information is to analyze the role of taxpayer burden in tax administration. We will also use the information to fulfill 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. We will also use the information provided to better understand taxpayer needs and burden reduction opportunities.

Tax information may be disclosed only as provided by 26 U.S.C. 6103. Providing the information is voluntary. Not providing all or part of the information requested may reduce our ability to address taxpayer concerns regarding paperwork reduction.

OMB No: 1545-2212. This report is authorized under the Paperwork Reduction Act. 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 to the fullest extent allowable under the Freedom of Information Act (FOIA). Public reporting burden for this collection of information is estimated to average 10 to 15 minutes, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to IRS Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Avenue, NW, Washington, DC 20224.

If you would prefer to complete the survey on the web, you may do so by following the instructions below. Web responses are processed more quickly and will help ensure that you don't receive follow-up contacts.

Web Survey Instructions

1 Go to the website.

To take the survey online, please go to:

www.TCB-B.org

2 Log in.

You will need the following username and password to access the survey:

Username: **[UID]**
Password: **[PWD]**

Problems?

If you have any technical difficulties, including problems with the website, please call 1-855-737-4070 or send an email to TCB-B@westat.com

Si usted desea contestar esta encuesta en español, por favor llame al 1-855-737-4070 o envíe un correo electrónico a TCB-B@westat.com

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