

# Instructions



## Welcome to the IRS Information Return Burden Survey

Thank you for taking the time to provide us feedback. Please answer all questions with reference to information returns issued for Tax Year 2021. 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, please email us at [raas.irs.taxpayer.surveys@irs.gov](mailto:raas.irs.taxpayer.surveys@irs.gov) or call 1-800-627-2703. You can find a Frequently Asked Questions (FAQ) document, glossary, 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 Information Return 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 fulfill 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.

Next

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.

[FAQs](#)  
[Glossary](#)  
[Preview Survey Questions](#)

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# Question



## Information Returns Issued for Tax Year 2021

Which of the following types of information returns, other than Form W-2, did your organization issue for Tax Year 2021?

Check all that apply.

- 1098
- 1098-T
- 1099-B
- 1099-C
- 1099-DIV
- 1099-INT
- 1099-K
- 1099-MISC
- 1099-NEC
- 1099-R
- 1099-S
- 1042-S
- Other

How many information returns did your organization issue to recipients for Tax Year 2021? If you do not know, please provide your best estimate.

Previous

Next

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.

[FAQs](#)  
[Glossary](#)  
[Preview Survey Questions](#)

Technical Assistance 1.800.627.2703 or raas.irs.taxpayer.surveys@irs.gov

# Question



## Persons Involved in Tax Year 2021 Information Return Activities

Think about the persons involved in issuing information returns. For each of the questions below, check all that apply.

Who maintained the records needed for these forms?

- [Owner or partner](#)
- [Employee](#) of your organization
- [Contract employee](#)
- [External service provider](#)
- Other

Who prepared these forms?

- [Owner or partner](#)
- [Employee](#) of your organization
- [Contract employee](#)
- [External service provider](#)
- Other

Who issued these forms?

- [Owner or partner](#)
- [Employee](#) of your organization
- [Contract employee](#)
- [External service provider](#)
- Other

Who completed corrections to these forms?

- [Owner or partner](#)
- [Employee](#) of your organization
- [Contract employee](#)
- [External service provider](#)
- Other

[Previous](#)

[Next](#)

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.

[FAQs](#)  
[Glossary](#)  
[Preview Survey Questions](#)

Technical Assistance 1.800.627.2703 or raas.irs.taxpayer.surveys@irs.gov

Form 14663 (OS) (Rev. 09-2022) Catalog Number 714285 OMB No. 1545-2212 Department of the Treasury - Internal Revenue Service

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# Question



## Activities Performed by Individuals Outside Your Organization

For which of the following activities did your organization use an external service provider or contract employee? Check all that apply.

- Recordkeeping.** This includes time spent on activities such as creating, tracking, obtaining, organizing, and storing records
- Preparing information returns**
- Providing information returns to taxpayers.** This includes time spent on activities such as printing and mailing, and supporting opt-in electronic access
- Fixing issues with information returns prior to submission to IRS.** This includes time spent on activities such as addressing recipient issues, requesting and tracking down missing or erroneous data, and issuing amended documents to recipients
- Submitting information returns to IRS.** This includes activities such as electronic submission, printing, and mailing
- Preparing and providing corrected information returns after submission to IRS.** This includes activities such as addressing recipient issues, requesting and tracking down missing or erroneous data, issuing amended documents to recipients, and submitting corrected documents to the IRS
- Other** information return-related activities.
- None of the above.** All information return-related activities are performed by the owner or employees of the organization

Previous

Next

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.

[FAQs](#)  
[Glossary](#)  
[Preview Survey Questions](#)

Technical Assistance 1.800.627.2703 or raas.irs.taxpayer.surveys@irs.gov

# Question



How much did your organization pay for the activities you marked in the previous question? If you are not sure, please provide your best estimate.

\$

Previous

Next

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.

[FAQs](#)

[Glossary](#)

[Preview Survey Questions](#)

Technical Assistance 1.800.627.2703 or [raas.irs.taxpayer.surveys@irs.gov](mailto:raas.irs.taxpayer.surveys@irs.gov)

Form **14663 (OS)** (Rev. 09-2022) Catalog Number 71426S OMB No. 1545-2212 Department of the Treasury - Internal Revenue Service

# Question



Regarding fees, we know it may be difficult to separate the cost for your information return-related activities from additional services provided. Were any other services included in the amount you reported?

Yes

No

Please describe the additional services:

Previous

Next

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.

[FAQs](#)

[Glossary](#)

[Preview Survey Questions](#)

Technical Assistance 1.800.627.2703 or raas.irs.taxpayer.surveys@irs.gov

Form **14663 (OS)** (Rev. 09-2022) Catalog Number 71426S OMB No. 1545-2212 Department of the Treasury - Internal Revenue Service

# Question



## Time Spent by Owners, Partners and Employees

How much **time** did your organization spend on each of the Tax Year 2021 information return activities listed below? Do not include time spent by external service providers or contract employees.

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

	Hours	Minutes
<b>Recordkeeping.</b> Includes time spent on activities such as creating, tracking, obtaining, organizing, and storing records	<input type="text" value="Hours"/>	<input type="text" value="Minutes"/>
<b>Reviewing, selecting, or learning to use off the shelf software</b>	<input type="text" value="Hours"/>	<input type="text" value="Minutes"/>
<b>Creating, maintaining, or updating customized or proprietary tax preparation software</b> that has been developed specifically for your organization	<input type="text" value="Hours"/>	<input type="text" value="Minutes"/>
<b>Preparing information returns</b>	<input type="text" value="Hours"/>	<input type="text" value="Minutes"/>
<b>Providing information returns to taxpayers.</b> Includes activities such as printing, mailing, and supporting opt-in electronic access	<input type="text" value="Hours"/>	<input type="text" value="Minutes"/>
<b>Fixing issues with amended information returns prior to submission to the IRS.</b> Includes activities such as addressing recipient issues, requesting and tracking down missing or erroneous data, and issuing amended returns to recipients	<input type="text" value="Hours"/>	<input type="text" value="Minutes"/>
<b>Submitting information returns to IRS.</b> Includes activities such as electronic submission, printing, and mailing	<input type="text" value="Hours"/>	<input type="text" value="Minutes"/>
<b>Preparing and providing corrected information returns, after submitting the documents to the IRS.</b> Includes activities such as addressing recipient issues, requesting and tracking down missing or erroneous data, issuing amended documents to recipients, and submitting corrected documents to the IRS	<input type="text" value="Hours"/>	<input type="text" value="Minutes"/>
<b>Other information return-related activities</b>	<input type="text" value="Hours"/>	<input type="text" value="Minutes"/>

[Previous](#)

[Next](#)

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.

[FAQs](#)  
[Glossary](#)  
[Preview Survey Questions](#)

Technical Assistance 1.800.627.2703 or [raas.irs.taxpayer.surveys@irs.gov](mailto:raas.irs.taxpayer.surveys@irs.gov)

Form 14663 (OS) (Rev. 09-2022) Catalog Number 714265 OMB No. 1545-2212 Department of the Treasury - Internal Revenue Service

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## Question

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You reported spending a total of 0 hours and 0 minutes on Tax Year 2021 information return activities. If this is correct, please click next to proceed.

Previous

Next

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.

[FAQs](#)

[Glossary](#)

[Preview Survey Questions](#)

Technical Assistance 1.800.627.2703 or [raas.irs.taxpayer.surveys@irs.gov](mailto:raas.irs.taxpayer.surveys@irs.gov)

Form **14663 (OS)** (Rev. 09-2022) Catalog Number 714265 OMB No. 1545-2212 Department of the Treasury - Internal Revenue Service



# Question



## Internal Costs

Think only about the owners, partners and employees in your organization who are responsible for information return issuing activities. What is their average hourly pay rate? If you do not know, please provide your best estimate. If an external service provider or contract employee manages all your organization's information return issuing activities enter "0".

\$  Average Hourly Rate

Think about your organization's internal, non-labor costs for all information return pre-filing and filing activities, such as software, the cost of paper, postage and equipment. How much money was spent on purchasing, creating, or updating tax-specific software (either off-the-shelf or customized)? If there were no costs, please enter "0".

\$  Amount Spent

How much money was spent on paper, postage, and equipment?

\$  Amount Spent

Next

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.

[FAQs](#)

[Glossary](#)

[Preview Survey Questions](#)

Technical Assistance 1.800.627.2703 or [raas.irs.taxpayer.surveys@irs.gov](mailto:raas.irs.taxpayer.surveys@irs.gov)

Form 14663 (OS) (Rev. 09-2022) Catalog Number 71426S OMB No. 1545-2212 Department of the Treasury - Internal Revenue Service

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# Question



## Post-Filing Activity

Think about your organization's total time and money spent for responding to IRS notices, addressing penalties, or resolving any other information return-related issue during Calendar Year 2021.

How much time did your organization spend on these activities?

Do *not* include time spent by external service providers or contract employees.

If you did not spend any time on the activity, enter "0".

Total time spent responding to IRS notices, addressing penalties, or resolving any other information return-related issue during Calendar Year 2021	Hours	Minutes
	<input type="text"/>	<input type="text"/>

Previous

Next

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.

[FAQs](#)  
[Glossary](#)  
[Preview Survey Questions](#)

Technical Assistance 1.800.627.2703 or raas.irs.taxpayer.surveys@irs.gov

# Question



How much money was spent by your organization or paid to external service providers on these activities (labor or non-labor costs)? If no money was spent enter "0".

Do not include taxes, fees or penalties paid to IRS.

\$  Amount Spent

Previous

Next

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.

[FAQs](#)

[Glossary](#)

[Preview Survey Questions](#)

Technical Assistance 1.800.627.2703 or [raas.irs.taxpayer.surveys@irs.gov](mailto:raas.irs.taxpayer.surveys@irs.gov)

Form **14663 (OS)** (Rev. 09-2022) Catalog Number 71426S OMB No. 1545-2212 Department of the Treasury - Internal Revenue Service

# Question



Considering all aspects of information return issuing activities, what do taxpayers find to be the most difficult part of complying with information return reporting requirements?

Please provide any suggestions for how the IRS could improve the information return reporting experience or taxpayer service in general.

[Previous](#)

[Next](#)

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.

[FAQs](#)  
[Glossary](#)  
[Preview Survey Questions](#)

Technical Assistance 1.800.627.2703 or [raas.irs.taxpayer.surveys@irs.gov](mailto:raas.irs.taxpayer.surveys@irs.gov)

# Submission Page



You have finished the survey.

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

Previous

Next

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.

[FAQs](#)  
[Glossary](#)  
[Preview Survey Questions](#)

Technical Assistance 1.800.627.2703 or [raas.irs.taxpayer.surveys@irs.gov](mailto:raas.irs.taxpayer.surveys@irs.gov)

Form 14663 (OS) (Rev. 09-2022) Catalog Number 714265 OMB No. 1545-2212 Department of the Treasury - Internal Revenue Service

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