PPB Screenshot Contents

Login Page

Pension Plan Burden Survey

OMB No: 1545-2212

Please enter your PIN to begin.

Enter your PIN

Login to Survey

By entering your PIN you are confirming authorized access to this application.

Welcome to the IRS Pension Plan Burden Survey

To begin, please enter the PIN that you received in the mail. If you need this information again or have technical difficulties, please contact us at 855-828-6291.

Technical Assistance 855-828-6291 (toll free), email IRS-PPBSurvey@westat.com

FAQ

Pension Plan Burden Survey

What is the Pension Plan Burden Survey?

- This survey is about the time and out-of-pocket costs pension plan sponsors (including one-participant owners) spent to comply with their Plan Year 2017 federal pension plan reporting requirements (Forms 5500, 5500-EZ, and 5500-SF). This information will be used to better understand and estimate the burden faced by pension plan sponsors.

Who should complete this survey?

- The individual responsible for filing the federal pension plan annual return should complete this survey, even if the return was prepared by someone else. This is usually the plan sponsor. Feel free to consult with others to complete this survey, but please do not forward this survey to your third-party service providers.
- If you serve as a sponsor for more than one pension plan, please answer all questions only for the following plan:
  Plan T022, plan number 22.
- We will refer to this plan as the "pension plan" throughout the survey.

What does "Plan Year 2017 federal pension plan annual return" refer to?

- Plan Year 2017 federal pension plan annual return refers to Form 5500, 5500-EZ, or 5500-SF, as well as any related forms, schedules, and worksheets.

How was I selected for this survey?

- You were randomly selected from all plan sponsors who filed a Form 5500, 5500-EZ, or 5500-SF for Plan Year 2017.

How will my answers be used?

- Please be assured that 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.

Why should I participate?

- While participation is voluntary, information about your pension plan reporting experience will help the IRS better understand and estimate the burden imposed by pension plan reporting requirements. We encourage you to take a few minutes of your time to participate.

How long will this survey take?

- This survey should take 10 to 15 minutes to complete, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information.

Who can I contact with questions?

- If you have questions about the content of this survey please call Dawn Nelson at Westat by phone at 855-828-6291 or send an email to IRS-PPBSurvey@westat.com. If you would like to contact someone at the IRS, please email Scott Leary at Scott.P.Leary@irs.gov.
- To read the official IRS announcement regarding this survey, please visit the following URL on the IRS website: https://www.irs.gov/statistics/2017-pension-plan-burden-survey.

Privacy and Paperwork Reduction Act Notice for Pension Plan Burden Survey Data Collection

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 Special Services Section, SE:W:CAR:MP:T:M:S, Room 6129, 1111 Constitution Ave. NW, Washington, DC 20224.

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Instructions

Pension Plan Burden Survey

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Instructions and Recommendations for Completing the Survey

- The survey pages are best viewed through a full-size browser window.
- Please do NOT use your browser's forward and back buttons to navigate through the survey. If you do, the answers you have entered may be lost. Instead, please use the "Previous" and "Next Question" buttons on the bottom left of each page.
- If you would like to leave the survey before you are finished, please click on the "Save and Continue Later" button at the bottom right of the page. Clicking on the "x" in your browser to close the window may cause your data to be lost.
- If you exit, you will be able to re-enter the survey using the same username and password.
- Once you complete the survey, you will be asked to submit it. Once you click the "Submit" button, you will not be able to re-enter your survey.
- If you have any questions, please click on the "FAQs" or "Contact Us" link at the top of the page.

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Question 1

PROGRAMMING NOTE: THIS SURVEY HAD A PLAN NAME AND NUMBER FILL. FOR PURPOSES OF THIS DOCUMENT, “PLAN T022, plan number 22” IS USED.

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Please answer all questions for the following plan only: Plan T022, plan number 22

Persons Involved in Plan Year 2017 Federal Pension Plan Annual Return Activities

Please answer all questions with reference to the Plan Year 2017 federal pension plan annual return for the following plan only: Plan T022, plan number 22.

1. Think about the persons involved in your organization's Plan Year 2017 federal pension plan annual return.

Mark all that apply.

A. Who maintained the records needed to complete the Plan Year 2017 federal pension plan annual return?

- ☐ Owner
- ☐ Employee(s)
- ☐ Third-Party Service Provider
- ☐ Other

B. Who prepared and filed the Plan Year 2017 federal pension plan annual return?

- ☐ Owner
- ☐ Employee(s)
- ☐ Third-Party Service Provider
- ☐ Other

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Question 2

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Please answer all questions for the following plan only: Plan T022, plan number 22

Pension Plan Return-Related Recordkeeping

Please think about your organization's pension plan return-related recordkeeping. Return-related recordkeeping includes all the activities you did to create, maintain, and store records needed to complete your Plan Year 2017 federal pension plan annual return and related forms and schedules.

2. Do you use the same recordkeeping system as payroll for your pension plan return-related recordkeeping?

- ☐ Yes
- ☐ No
- ☐ Don't know

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Question 3

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Please answer all questions for the following plan only: Plan T022, plan number 22

Pension Plan Return-Related Recordkeeping

3. For each system below, indicate whether your organization used it in Plan Year 2017 to keep track of pension plan return-related records.

Did your organization use...

A. General recordkeeping software products such as Microsoft® Office, IBM Notes, OpenOffice?

- ☐ Yes
- ☐ No
- ☐ Don't know

B. A checking or investment account from which all pension plan expenses are paid?

- ☐ Yes
- ☐ No
- ☐ Don't know

C. A separate hard-copy ledger?

- ☐ Yes
- ☐ No
- ☐ Don't know

D. A third-party service provider to perform all recordkeeping?

- ☐ Yes
- ☐ No
- ☐ Don't know

E. Any other accounting or bookkeeping system?

- ☐ Yes
- ☐ No
- ☐ Don't know

Please describe:

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Question 4

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IRS

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Please answer all questions for the following plan only: Plan T022, plan number 22

Gathering Materials, Learning About Requirements, and Using IRS Taxpayer Services

Consider the materials your organization gathered and how your organization learned about its Plan Year 2017 federal pension plan annual return requirements.

4. Did you or others at your organization ...

A. Visit the IRS website?

- ☐ Yes
- ☐ No
- ☐ Don't know

B. Order forms, publications, or other materials from the IRS either via mail or telephone?

- ☐ Yes
- ☐ No
- ☐ Don't know

C. Review IRS tax forms and publications in preparation for completing your Plan Year 2017 federal pension plan annual return, or in deciding to hire a third-party service provider?

- ☐ Yes
- ☐ No
- ☐ Don't know

D. Attend tax seminars/training to learn about federal pension plan return reporting requirements?

- ☐ Yes
- ☐ No
- ☐ Don't know

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Question 5

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Please answer all questions for the following plan only: Plan T022, plan number 22

Time Spent on Tax-Related Activities

5. Think about all the time your organization spent on pension plan-related recordkeeping, planning, gathering return-related materials, learning about reporting requirements, using IRS or non-IRS resources, and completing, reviewing, and submitting the Plan Year 2017 federal pension plan annual return.

Please include time spent:

- *On the Plan Year 2017 federal pension plan annual return as well as any associated forms, schedules, and worksheets that you completed or filed*
- *Throughout the Plan Year as well as the tax filing season*
- *Corresponding or speaking with your organization's third-party service provider*

Please do NOT include time spent:

- *By third-party service providers*
- *On federal, state, or local income tax returns*
- *On other types of returns*

How much time did your organization spend on the following activities for its Plan Year 2017 federal pension plan return? If you're not sure, please provide your best estimate.

A. Recordkeeping for the pension plan that would not have been gathered or reconciled for normal business practices or normal plan operation?

Hours : Minutes

☐ No time spent

B. Planning activities related to the filing of your organization's Plan Year 2017 federal pension plan annual return?

Hours : Minutes

☐ No time spent

C. Gathering materials, learning about reporting requirements, and using IRS or non-IRS resources?

Hours : Minutes

☐ No time spent

D. Completing and submitting your organization's Plan Year 2017 federal pension plan annual return, including any time you spent corresponding with your third-party service provider?

Hours : Minutes

☐ No time spent

E. All other Plan Year 2017 federal pension plan return-related activities?

Hours : Minutes

Please describe:

☐ No time spent

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Question 6

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Please answer all questions for the following plan only: Plan T022, plan number 22

Costs Associated with Tax Compliance

6. Please think about how much money your organization spent to comply with its Plan Year 2017 federal pension plan annual reporting requirements. If you're not sure, please provide your best estimate.

6A. How much did your organization spend on all third-party service providers for Plan Year 2017 services related to this pension plan?

$ ______ . ______
Dollars Cents

☐ Did not use a third-party service provider

6A1. Of the amount in Question 6A, how much was spent on planning activities and recordkeeping related to the filing of your organization's Plan Year 2017 federal pension plan annual return?

$ ______ . ______
Dollars Cents

☐ No money spent

6A2. Of the amount in Question 6A, how much was spent on the preparation of your organization's Plan Year 2017 federal pension plan annual return (Form 5500, 5500-EZ, or 5500-SF)?

$ ______ . ______
Dollars Cents

☐ No money spent

6B. How much did your organization spend on tax software to prepare its Plan Year 2017 federal pension plan annual return?

$ ______ . ______
Dollars Cents

☐ No money spent

6C. How much was spent on other tax activities related to the pension plan reporting requirements for Plan Year 2017? This may include money spent on tax research services, tax publications and journals, printing and mailing required notices to IRS and plan members (other than the 1099-R), and transportation.

$ ______ . ______
Dollars Cents

☐ No money spent

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Questions 7 and 8

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Additional Questions

7. What is the most difficult part of complying with federal pension plan reporting responsibilities?

1000 character(s) left.

8. Please describe below any suggestions you have for how the IRS could improve taxpayer service or reduce the compliance burden associated with pension plan reporting (Forms 5500, 5500-EZ, and 5500-SF, as well as any related forms, schedules, worksheets, and instructions)?

1000 character(s) left.

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Submit Screen

IRS

Pension Plan Burden Survey

You have finished the survey. If you would like to print a copy of the completed survey with your answers, please click on the "Print Completed Survey" button.

Print Completed Survey

Please click the button below to submit your survey. Once you click "Submit Survey", you will not be able to return to the survey.

Submit Survey

If you would prefer to return to the survey, please click on the "Return to Survey" button.

« Return to Survey

Technical Assistance 855-828-6291 (toll free), email IRS-PPBSurvey@westat.com

Return to Survey page

Pension Plan Burden Survey

Welcome back to the IRS Pension Plan Burden Survey

If you like, you may return to where you left off.

To see a copy of your current responses, please click the 'Next Question in Survey' button and then click the 'Print Current Survey' link on the top, right-side of the survey page.

Next Question in Survey

OR

You can return to the beginning of the survey.
Your answers from your previous visit have been saved and will be displayed.

Return to Beginning of Survey

Technical Assistance 855-828-6291 (toll free), email IRS-PPBSurvey@westat.com