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Sample



# Excise Tax Burden Survey

OMB No: 1545-2212

Please enter your PIN to begin.

Login to Survey

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

Welcome to the IRS Excise Tax 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 855-682-3074.

Technical Assistance: 855-682-3074 (toll free); email: [IRS-EXTSurvey@westat.com](mailto:IRS-EXTSurvey@westat.com)



# Excise Tax Burden Survey

FAQs | Contact Us

## What is the Excise Tax Burden Survey?

- This survey is about the time and out-of-pocket costs you spent to file your federal excise tax return(s) and related attachments for Tax Year 2018. These costs are a combination of time spent and out-of-pocket expenses. Please be assured that you will not be asked about income or other financial details.

## Who should complete this survey?

- The business that incurred the excise tax and filed Form(s) 720 and related attachments should complete this survey, even if it was prepared by someone else. Feel free to consult with others, but please do not forward this survey to your external service provider.

## How was I selected for this survey?

- You were randomly selected from all taxpayers who filed Quarterly Excise Tax Return Form(s) 720 and related attachments for Tax Year 2018.

## 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 excise tax reporting experience will help the IRS reduce taxpayer burden for all taxpayers. We encourage you to take a few minutes of your time to participate. By doing so, you will make sure that businesses like yours are represented.

## 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 Sarah Bennett-Harper at Westat by phone at 855-682-3074 or send an email to [IRS-EXTSurvey@westat.com](mailto:IRS-EXTSurvey@westat.com). If you would like to contact someone at the IRS, please email Rizwan Javaid at [Rizwan.U.Javaid@irs.gov](mailto:Rizwan.U.Javaid@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/2018-excise-tax-burden-survey>.

### Privacy and Paperwork Reduction Act Notice for Excise Tax Burden 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, SEW:CAR:MP:T:M:S, Room 6120, 1111 Constitution Ave. NW, Washington, DC 20224.

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## Excise Tax 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 left 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 PIN.
- 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 HAS A BUSINESS NAME FILL. FOR PURPOSES OF THIS DOCUMENT, "BUSINESS26'S" NAME IS USED.**

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[Print Current Survey](#)

Please answer all questions with reference to Business26's Tax Year 2018 federal excise tax return(s) and related attachments.

## Tax Preparation Methods and Activities

1. Which of the following methods did you use to prepare your business's Tax Year 2018 federal excise tax return(s) and related attachments?

Did your business use...

**A. A tax preparation service? (e.g., a CPA, accountant, bookkeeper, a tax lawyer, an enrolled agent, registered tax preparer)**

- Yes
- No
- Don't Know

**B. A tax advisory/planning service?**

- Yes
- No
- Don't Know

**C. Accounting and/or financial software? (e.g., QuickBooks Pro™, SAGE®)**

- Yes
- No
- Don't Know

**D. Tax preparation software? (e.g., ETEC Form 2290, Modernized E-File Form 720, custom software)**

- Yes
- No
- Don't Know

**E. Any other methods? Please describe:**

- Yes
- No
- Don't Know

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## Question 2

Please answer all questions with reference to Business26's Tax Year 2018 federal excise tax return(s) and related attachments.

### Tax-Related Recordkeeping

Please think about your business's excise tax-related recordkeeping. Tax-related recordkeeping includes all the activities your business did to create, maintain, and store records needed to complete its Tax Year 2018 federal excise tax return(s) and related attachments.

2. For each recordkeeping system below, indicate whether your business used it in Tax Year 2018 to keep track of its excise tax liability.

Did your business 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 the excise taxes are paid?**

- Yes
- No
- Don't Know

**C. A separate hard-copy ledger?**

- Yes
- No
- Don't Know

**D. Any other tax-related recordkeeping system during Tax Year 2018? Please describe:**

- Yes
- No
- Don't Know

## Question 3

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Please answer all questions with reference to Business26's Tax Year 2018 federal excise tax return(s) and related attachments.

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

Consider the tax-related materials you gathered and how your business learned about requirements to complete its Tax Year 2018 federal excise tax return(s) and related attachments.

3. Did your business...

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 the Tax Year 2018 federal excise tax return(s) and related attachments, or in deciding to hire an external service provider?

- Yes
- No
- Don't Know

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

- Yes
- No
- Don't Know

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# Question 4

Please answer all questions with reference to Business26's Tax Year 2018 federal excise tax return(s) and related attachments.

## Time Spent on Tax-Related Activities

4. Think about all the time your business spent on tax-related recordkeeping, tax planning, gathering tax-related materials, learning about tax law, using IRS or non-IRS resources, completing, reviewing, and submitting the Tax Year 2018 federal excise tax return(s) and related attachments, and calculating and depositing estimated tax payments.

Please include time spent:

- On all Tax Year 2018 quarterly federal excise tax return(s) and related attachments as well as any associated forms, schedules, and worksheets that your business completed or filed
- Throughout the tax year as well as the tax filing season
- Corresponding or speaking with an external service provider(s)

Please do **NOT** include time spent:

- By an external service provider(s)
- On any state or local excise tax return(s)
- On federal, state, or local income tax returns
- On other types of returns
- Responding to IRS notices or correspondence

4A. How much time did your business spend on the following activities for its Tax Year 2018 federal excise tax return(s) and related attachments? If you're not sure, please provide your best estimate.

1. Tax recordkeeping, including reconciling financial and tax records?

:   
Hours      Minutes

No time spent

2. Tax planning?

:   
Hours      Minutes

No time spent

3. Gathering materials, learning about tax law, and using IRS or non-IRS resources?

:   
Hours      Minutes

No time spent

4. Calculating and depositing estimated tax payments?

:   
Hours      Minutes

No time spent



# Questions 4A5 and 4A6

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5. Completing and submitting the Tax Year 2018 federal excise tax return(s) and related attachments?

:   
Hours      Minutes

No time spent

6. All other activities related to Tax Year 2018 federal excise tax return(s) and related attachments, *please describe*:

1000 character(s) left.

:   
Hours      Minutes

No time spent

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Sample

# Question 5

Please answer all questions with reference to Business26's Tax Year 2018 federal excise tax return(s) and related attachments.

## Costs Associated with Tax Compliance

5. Please think about how much money your business spent to comply with its Tax Year 2018 federal excise tax reporting obligations. If you're not sure, please provide your best estimate.

How much did your business spend on...

### A. External service providers for tax planning for Tax Year 2018 federal excise taxes?

Dollars Cents

No money spent

### B. External service providers to prepare its Tax Year 2018 federal excise tax return(s) and related attachments?

Dollars Cents

No money spent

### C. Tax software to prepare the Tax Year 2018 federal excise tax return(s) and related attachments?

Dollars Cents

No money spent

### D. Other tax activities related to federal excise tax reporting requirements for Tax Year 2018? This may include money spent on electronic submission, photocopies, tax research services, tax publications and journals, transportation, postage, or IRS user fees.

Dollars Cents

No money spent

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## Question 6

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Please answer all questions with reference to Business26's Tax Year 2018 federal excise tax return(s) and related attachments.

### Additional Questions

6. In how many states did your business file an excise tax return for Tax Year 2018? If you do not know the exact number of states, please provide your best estimate.

Number of States

Did not file a state excise tax return

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Sample

## Question 7

IF Q6 IS GREATER THAN OR EQUAL TO 1, THEN DISPLAY Q7. OTHERWISE DISPLAY Q8.

Please answer all questions with reference to Business26's Tax Year 2018 federal excise tax return(s) and related attachments.

### Additional Questions

7. What was the total number of state excise tax returns your business filed in Tax Year 2018? If you do not know the exact number, please provide your best estimate.

Number of State Excise Tax Returns

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Sample

## Questions 8 and 9

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Please answer all questions with reference to Business26's Tax Year 2018 federal excise tax return(s) and related attachments.

### Additional Questions

8. What is the most difficult part of complying with federal excise tax reporting responsibilities?

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9. Please describe below any suggestions you have for how the IRS could improve taxpayer service or reduce the compliance burden associated with Form 720, quarterly excise tax return(s), and related forms, schedules, worksheets, and instructions.

1000 character(s) left.

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# Excise Tax Burden Survey

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### Submit your 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](#)

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# Excise Tax Burden Survey

## Welcome back to the IRS Excise Tax Burden Survey

If you like, you may return to where you left off by clicking on the 'Next Question in Survey' button below.

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 of the 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: 855-682-3074 (toll free); email: [IRS-EXTSurvey@westat.com](mailto:IRS-EXTSurvey@westat.com)