

Media & Publications Customer Satisfaction

**2024 Forms Distribution Survey
Web Version**

**Internal Revenue Service
Distribution Division**

// ONLINE HEADER – SEE P. 13 OF IRS STYLE GUIDE FOR FORMATTING //
// INSERT IRS LOGO IN UPPER LEFT CORNER //

Media & Publications External Customer Satisfaction Survey for Forms Distribution

Introduction

Welcome to the Internal Revenue Service (IRS) Media & Publications division's customer satisfaction survey. Pacific Consulting Group, an independent research organization, is working with the IRS to collect your feedback as an individual who orders federal tax products from the IRS.

This voluntary survey takes about 15minutes to complete.

To verify this survey, visit [IRS.gov/css](https://www.irs.gov/css) and look for *W&I: CARE: M&P: Forms Distribution*. If you have questions about this survey, please email us at MPHelp@pcgsurveys.com or call the help line at 844-817-3520.

Thank you in advance for participating in this important survey.

Disclosure and Security

Pacific Consulting Group holds your identity private to the extent allowed by law and only provides results to the IRS after combining them with other responses. In addition, Pacific Consulting Group provides raw data to the IRS with all personally identifiable information removed. Please feel confident that your answers will be used for the purpose stated above.

Privacy Act and Paperwork Reduction Act Notice

Our authority for requesting information with this survey is 5 U.S.C Section 301, and 26 U.S.C Sections 7801, 7803 and 7805. This information will help the IRS improve services to taxpayers and tax professionals.

We estimate that it will take 15 minutes to complete this survey, including time for reviewing instructions. 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 concerns regarding taxpayer and tax professional experience.

Paperwork Reduction Act Notice: The Paperwork Reduction Act requires that the IRS display an OMB Control Number on all public information requests. The OMB Control Number for this study is 1545-1432. If you have any comments regarding the time estimate associated with completing the survey or suggestions for making this process simpler, please write to the: Internal Revenue Service, Special Services Section, C:DC:TS:CAR:MP:T:M:S – Room 6526, 1111 Constitution Ave. NW, Washington, DC 20224.

// FOOTER – SEE P.13 OF IRS STYLE GUIDE FOR FORMATTING //

Form **14621 (OS)** (Rev. 3-2023) Catalog Number 66704J OMB Number 1545-2250
Department of the Treasury - **Internal Revenue Service**

// Page Break //

// "PARTNER INFORMATION" Running Header for Partner Information subsection. //

PARTNER INFORMATION

Question Number: Q1

Question Type: Single Select

Variable Name: Q1

Variable Text: During the 2023 tax season, about how many people (i.e., customers) obtained federal tax products from your location?

Variable Label: Q1: During the 2023 tax season, about how many people (i.e., customers) obtained federal tax products from your location?

// TERMINATE IF Q1 = 1 (None). IF TERMINATED, SHOW FOLLOWING TEXT IN ADDITION TO CLOSING STATEMENT. //

[You aren't eligible to participate in this survey because no one obtained federal tax products from your location during the 2023 tax season. The IRS and Pacific Consulting Group thank you for your time.]

Value	Value Label
1	None
2	1-250
3	251-500
4	More than 500
-99	Refused

// Page Break //

Question Number: Q2

Question Type: Single Select

Variable Name: Q2

Variable Text: What type of organization is your tax forms outlet? *(Please select one)*

Variable Label: Q2: What type of organization is your tax forms outlet?

Value	Value Label
1	Academic library (serves colleges and universities)
2	Public library (serves cities and towns)
3	Government or military
4	Other—Please tell us: [Text box]
-99	Refused
-100	Valid Skip

// DATA MANAGEMENT NOTE: THE OPEN-ENDED RESPONSE VARIABLE FOR Q2_4 SHOULD BE Q2_OTHER //

// Page Break //

// "IRS TAX FORMS OUTLET PROGRAM (TFOP)" Running Header for IRS Tax Forms Outlet Program (TFOP) subsection. //

IRS TAX FORMS OUTLET PROGRAM (TFOP)

The next few questions are about your satisfaction with the IRS Tax Forms Outlet Program (TFOP) as a whole and with specific aspects of the program.

Question Number: Q3

Question Type: Single Select

Variable Name: Q3

Variable Text: Overall, how would you rate your **satisfaction** with the IRS Tax Forms Outlet Program (TFOP)?

Variable Label: Q3: Overall, how would you rate your satisfaction with the IRS Tax Forms Outlet Program (TFOP)?

Value	Value Label
1	Very dissatisfied
2	Dissatisfied
3	Neither satisfied nor dissatisfied
4	Satisfied
5	Very satisfied
-99	Refused
-100	Valid Skip

// Page Break //

Question Number: Q4

Question Type: Single Select

Variable Name: Q4

Variable Text: Please rate your satisfaction with the **clarity** of the TFOP order form (Form 8635, *Order for Tax Forms Outlet Program*).

Variable Label: Q4: Please rate your satisfaction with the clarity of the TFOP order form (Form 8635, *Order for Tax Forms Outlet Program*).

Value	Value Label
1	Very dissatisfied
2	Dissatisfied
3	Neither satisfied nor dissatisfied
4	Satisfied
5	Very satisfied
-99	Refused
-100	Valid Skip

// Page Break //

Question Number: Q5

Question Type: Single Select

Variable Name: Q5

Variable Text: Please rate your satisfaction with the **ease of using** the TFOP order form (Form 8635, *Order for Tax Forms Outlet Program*).

Variable Label: Q5: Please rate your satisfaction with the ease of using the TFOP order form (Form 8635, *Order for Tax Forms Outlet Program*).

Value	Value Label
1	Very dissatisfied
2	Dissatisfied
3	Neither satisfied nor dissatisfied
4	Satisfied
5	Very satisfied
-99	Refused
-100	Valid Skip

// Page Break //

Question Number: Q6_open

Question Type: Open End Essay

Variable Name: Q6_open

Variable Text: In your opinion, what would make the TFOP order form clearer or easier to use?

Variable Label: Q6_open: In your opinion, what would make the TFOP order form clearer or easier to use?

// IF Q5 = 1 (Very dissatisfied) OR 2 (Dissatisfied), ASK Q6_open. ELSE SKIP TO Q7. //

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// Page Break //

Question Number: Q7

Question Type: Single Select

Variable Name: Q7

Variable Text: Please rate your satisfaction with the clarity of the **order acknowledgement** you received from the TFOP.

Variable Label: Q7: Please rate your satisfaction with the clarity of the order acknowledgement you received from the TFOP.

Value	Value Label
1	Very dissatisfied
2	Dissatisfied
3	Neither satisfied nor dissatisfied
4	Satisfied
5	Very satisfied
6	Did not receive an order acknowledgement
-99	Refused
-100	Valid Skip

// Page Break //

Question Number: Q8

Question Type: Single Select

Variable Name: Q8

Variable Text: Please rate your satisfaction with **receiving answers** to your questions about the TFOP.

Variable Label: Q8: Please rate your satisfaction with receiving answers to your questions about the TFOP.

Value	Value Label
1	Very dissatisfied
2	Dissatisfied
3	Neither satisfied nor dissatisfied
4	Satisfied
5	Very satisfied
6	Did not have any questions about the TFOP
-99	Refused
-100	Valid Skip

// Page Break //

// “YOUR TFOP ORDER” Running Header for Your TFOP Order subsection. //

YOUR TFOP ORDER

The next questions are about your TFOP order for federal tax products this year. When responding to this question, think about the timeliness of receipt, condition of product and order completeness.

Question Type: Single Select

Variable Name: Q9

Variable Text: What computer operating system do you use?

Variable Label: Q9: What computer operating system do you use?

Value	Value Label
1	Microsoft Windows
2	Apple macOS
3	Android (Mobile)
4	Apples iOS (Mobile)
5	I don't know
6	Other
-99	Refused
-100	Valid Skip

// Page Break //

Question Type: Multi Select

Variable Name: Q10

Variable Text: Did you experience any problems with your order? (Select all that apply)

Variable Label: Q10: Did you experience any problems with your order?

Variable Name	Variable Text	Variable Label
Q10_1	None	Q10_1: Did you experience any problems with your order? None
Q10_2	Order was incomplete	Q10_2: Did you experience any problems with your order? Order was incomplete.
Q10_3	Some tax products were late	Q10_3: Did you experience any problems with your order? Some tax products were late.
Q10_4	Whole order was late	Q10_4: Did you experience any problems with your order? Whole order was late.
Q10_5	Order was sent to the wrong address	Q10_5: What issue(s) caused you problems with your order? Order was sent to the wrong address.
Q10_6	Hard to order the product amounts we needed	Q10_6: Did you experience any problems with your order? Hard to order the product amounts we needed.
Q10_7	Tax materials were damaged	Q10_7: Did you experience any problems with your order? Tax materials were damaged.
Q10_8	Other—Please tell us [Text box]	Q10_8: Did you experience any problems with your order? Other
Q10_REF	//NOT SHOWN//	Q10_REF: Did you experience any problems with your order? REFUSED

Value	Value Label	Refused Value	Value Label
1	Yes	1	Refused
2	No	0	Answered
-100	Valid Skip	-100	Valid Skip

// DATA MANAGEMENT NOTE: THE OPEN-ENDED RESPONSE VARIABLE FOR Q10_7 SHOULD BE Q10_OTHER //

// Page Break //

Question Number: Q11

Question Type: Single Select

Variable Name: Q11

Variable Text: Did you email the TFOP Administrator about any issue(s) causing you dissatisfaction with your order?

Variable Label: Q11: Did you email the TFOP Administrator about any issue(s) causing you dissatisfaction with your order?

Value	Value Label
1	Yes, and I received a reply from the TFOP
2	Yes, but I did not receive a reply from the TFOP
3	No, I did not email the TFOP
-99	Refused
-100	Valid Skip

// Page Break //

Question Number: Q12

Question Type: Single Select

Variable Name: Q12

Variable Text: Did the TFOP Administrator resolve the issue(s) regarding your order?

Variable Label: Q12: Did the TFOP Administrator resolve the issue(s) regarding your order?

// IF Q11 = 1 OR 2 (Yes), ASK Q12. ELSE SKIP TO Q14. //

Value	Value Label
1	Yes
2	No
-98	Don't know/Not sure
-99	Refused
-100	Valid Skip

// Page Break //

Question Number: Q13_open

Question Type: Open End Essay

Variable Name: Q13_open

Variable Text: What issue(s) did the TFOP **not** resolve regarding your order?

Variable Label: Q13_open: What issue(s) did the TFOP not resolve regarding your order?

// IF Q12 = 2 (No), ASK Q13_open. ELSE SKIP TO Q14. //

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// “FEDERAL TAX PRODUCT DELIVERY” Running Header for Federal Tax Product Delivery subsection. //

FEDERAL TAX PRODUCT DELIVERY

The next few questions are about delivery of federal tax products.

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Question Number: Q14

Question Type: Single Select

Variable Name: Q14

Variable Text: Did you receive an email notification(s) about the delivery of federal tax products in your order for the 2023 tax season?

Variable Label: Q14: Did you receive an email notification(s) about the delivery of federal tax products in your order for the 2023 tax season?

Value	Value Label
1	Yes
2	No
-99	Refused
-100	Valid Skip

// Page Break //

Question Number: Q15

Question Type: Single Select

Variable Name: Q15

Variable Text: Please rate your agreement with the following statement: *The email notifications were useful.*

Variable Label: Q15: Please rate your agreement with the following statement: The email notifications were useful.

// IF Q14 = 1 (Yes), ASK Q15. ELSE SKIP TO Q16. //

Value	Value Label
1	Strongly disagree
2	Disagree
3	Neither agree nor disagree
4	Agree
5	Strongly agree
-99	Refused
-100	Valid Skip

// Page Break //

Question Number: Q16

Question Type: Single Select

Variable Name: Q16

Variable Text: Did all federal tax products arrive within the timeframe you expected?

Variable Label: Q16: Did all federal tax products arrive within the timeframe you expected?

Value	Value Label
1	Yes
2	No
-99	Refused
-100	Valid Skip

// Page Break //

Question Number: Q17

Question Type: Single Select

Variable Name: Q17

Variable Text: If no, what timeframe would you have preferred?

Variable Label: Q17: If no, what timeframe would you have preferred?

// IF Q16 = 2 (No), ASK Q17. ELSE SKIP TO Q18. //

Value	Value Label
1	By January 15
2	By January 30
3	By a different date—Please tell us [Text box]
-99	Refused
-100	Valid Skip

// DATA MANAGEMENT NOTE: THE OPEN-ENDED RESPONSE VARIABLE FOR Q17_3 SHOULD BE Q17_OTHER //

// Page Break //

Question Number: Q18

Question Type: Single Select

Variable Name: Q18

Variable Text: This tax season, did your customers download any federal tax products from IRS.gov while at your location?

Variable Label: Q18: This tax season, did your customers download any federal tax products from IRS.gov while at your location?

Value	Value Label
1	Yes
2	No
-99	Refused
-100	Valid Skip

// Page Break //

Question Number: Q19

Question Type: Single Select

Variable Name: Q19

Variable Text: Are you aware that there are eBook versions of many IRS publications and instructions for mobile devices?

Variable Label: Q19: Are you aware that there are eBook versions of many IRS publications and instructions for mobile devices?

Value	Value Label
1	Yes
2	No
-99	Refused
-100	Valid Skip

// Page Break //

Question Number: Q20

Question Type: Single Select

Variable Name: Q20

Variable Text: Do you believe your customers would like to receive federal tax products through web-accessible mobile devices (i.e., smartphones, tablets or e-readers)?

Variable Label: Q20: Do you believe your customers would like to receive federal tax products through web-accessible mobile devices (i.e., smartphones, tablets or e-readers)?

Value	Value Label
1	Yes
2	No
-98	I don't know
-99	Refused
-100	Valid Skip

// Page Break //

Question Number: Q21

Question Type: Open End Essay

Variable Name: Q21

Variable Text: In your opinion, what are the most important improvements the IRS TFOP could make in its federal tax product ordering, delivery or communications processes?

Variable Label: Q21: In your opinion, what are the most important improvements the IRS TFOP could make in its federal tax product ordering, delivery and communications processes?

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The IRS Media & Publications division and Pacific Consulting Group thank you for your participation. Your responses help the IRS better serve future taxpayers' needs. If you have comments or questions, please email us at MPHelp@pcgsurveys.com, or call the help line at 844-817-3520.