

Media & Publications External Customer Satisfaction Survey (ECSS)
2024 Individual Taxpayer Survey

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.

1. Overall, how would you rate your satisfaction with the IRS on federal tax forms, instructions, and publications?
 - Very Dissatisfied
 - Dissatisfied
 - Neither Satisfied nor Dissatisfied
 - Satisfied
 - Very Satisfied

2. Did you prepare your 2023 federal income tax return?
 - Yes Continue the survey.
 - No Please answer only this item and return the survey in the envelope provided.

3. Did you prepare your 2023 federal income tax return using tax preparation software?
 - Yes Continue to question 4.
 - No Skip to question 5.

4. Please indicate which of the following best describes how you viewed your IRS federal tax forms while using tax preparation software. Select all that apply:
 - Viewed printed federal tax form while determining what to enter into software program.
 - Viewed electronic federal tax form while determining what to enter into software program.

- o Viewed printed federal tax form after completing return.
- o Viewed electronic federal tax form after completing return.
- o Never looked at a hard copy or electronic version (PDF or HTML online) of federal tax form. Relied solely on software to complete and submit federal income tax return.
- o Other (Please describe when and how you used the IRS federal tax form):

5. Please rate your satisfaction with the following forms and schedules. If you didn't use the identified form or schedule, please select "Not Applicable/Didn't Use."

	Very Dissatisfied (1)	Dissatisfied (2)	Neither Satisfied nor Dissatisfied (3)	Satisfied (4)	Very Satisfied (5)	Not applicable/Didn't Use (N/A)
A. Form 1040, U.S. Individual Income Tax Return	(1)	(2)	(3)	(4)	(5)	(N/A)
B. Form 1040-SR, U.S. Tax Return for Seniors	(1)	(2)	(3)	(4)	(5)	(N/A)
C. Schedule A for Itemized Deductions	(1)	(2)	(3)	(4)	(5)	(N/A)
D. Schedule B for Interest and Ordinary Dividends	(1)	(2)	(3)	(4)	(5)	(N/A)
E. Schedule C for Profit or Loss from Business (Sole Proprietorship)	(1)	(2)	(3)	(4)	(5)	(N/A)
F. Schedule D for Capital Gains and Losses	(1)	(2)	(3)	(4)	(5)	(N/A)
G. Schedule E for Supplemental Income and Loss	(1)	(2)	(3)	(4)	(5)	(N/A)

H. Schedule EIC for Earned Income Credit	(1)	(2)	(3)	(4)	(5)	(N/A)
I. Schedule 1 for Additional Income and Adjustments to Income	(1)	(2)	(3)	(4)	(5)	(N/A)
J. Schedule 2 for Additional Taxes	(1)	(2)	(3)	(4)	(5)	(N/A)
K. Schedule 3 for Additional Credits and Payments	(1)	(2)	(3)	(4)	(5)	(N/A)
L. Schedule 8812 for Credits for Qualifying Children and Other Dependents	(1)	(2)	(3)	(4)	(5)	(N/A)
M. Form 8863 for Education Credits (American Opportunity and Lifetime Learning Credits)	(1)	(2)	(3)	(4)	(5)	(N/A)
N. Other (please specify):						

6. Please tell us how we can improve the federal tax forms and schedules you rated as “Very Dissatisfied” or “Dissatisfied.”

7. Please rate your satisfaction with the following publications you may have used to help prepare your 2023 federal income tax return. If you didn’t use the identified publication, please select “Not Applicable/Didn’t Use.”

	Very Dissatisfied (1)	Dissatisfied (2)	Neither Satisfied nor Dissatisfied (3)	Satisfied (4)	Very Satisfied (5)	Not applicable/Didn't Use (N/A)
A. Pub. 17, Your Federal Income Tax (For Individuals)	(1)	(2)	(3)	(4)	(5)	(N/A)
B. Pub. 501, Dependents, Standard Deduction, and Filing Information	(1)	(2)	(3)	(4)	(5)	(N/A)
C. Pub. 502, Medical and Dental Expenses	(1)	(2)	(3)	(4)	(5)	(N/A)
D. Pub. 550, Investment Income and Expenses (Including Capital Gains and Losses)	(1)	(2)	(3)	(4)	(5)	(N/A)
E. Pub. 590-A, Contributions to Individual Retirement Arrangements (IRAs)	(1)	(2)	(3)	(4)	(5)	(N/A)

F. Pub. 590-B, Distributions from Individual Retirement Arrangements (IRAs)	(1)	(2)	(3)	(4)	(5)	(N/A)
G. Pub. 596, Earned Income Credit	(1)	(2)	(3)	(4)	(5)	(N/A)
H. Pub. 970, Tax Benefits for Education	(1)	(2)	(3)	(4)	(5)	(N/A)
I. Other (please specify):						

8. Please tell us how we can improve the publications you rated as “Very Dissatisfied” or “Dissatisfied.”

9. Thinking about all federal tax forms, instructions and publications you used to complete your federal income tax return, please rate your satisfaction with the following. If you didn’t perform any of the following, please select “Not Applicable/Didn’t Do.”

	Very Dissatisfied (1)	Dissatisfied (2)	Neither Satisfied nor Dissatisfied (3)	Satisfied (4)	Very Satisfied (5)	Not applicable/Didn’t Use (N/A)
A. The ease of finding federal tax forms and instructions	(1)	(2)	(3)	(4)	(5)	(N/A)
B. The ease of determining which federal tax forms and instructions you needed.	(1)	(2)	(3)	(4)	(5)	(N/A)
C. The ease of understanding the instructions	(1)	(2)	(3)	(4)	(5)	(N/A)
D. The ease of understanding the publications	(1)	(2)	(3)	(4)	(5)	(N/A)
E. Other (please specify):						



10. How can the IRS improve the way it communicates tax law changes?

11. What can the IRS do to make preparing and filing your taxes easier?

12. If you used Publication 17 to prepare your 2023 federal income tax return, what format did you use? (Select all that apply)

- PDF (online)
- HTML (online)
- eBook
- Printed
- Purchased from the Government Publishing Office (GPO)
- Other (Please specify):

13. Are you aware that eBook versions of many IRS publications and instructions are available for mobile devices?

- Yes. I used one or more to help prepare my 2023 federal income tax return.
- Yes. I am aware of the eBooks but didn't use them.
- No.

14. Did you use an electronic version of Form 1040 at IRS.gov to prepare your 2023 federal income tax return?

- Yes
- No

15. Did you use an electronic version of any federal tax publication at IRS.gov to help prepare your 2023 federal income tax return?

- Yes Continue to question 16.
- No Skip to question 19.

16. Please mark all electronic publications you used to prepare your 2023 federal income tax return. (Select all that apply)

- Pub. 17, Your Federal Income Tax (For Individuals)
- Pub. 501, Dependents, Standard Deduction, and Filing Information

- o Pub. 502, Medical and Dental Expenses (including the Health Coverage Tax Credit)
- o Pub. 550, Investment Income and Expenses (Including Capital Gains and Losses)
- o Pub. 590-A, Contributions to Individual Retirement Arrangements (IRAs)
- o Pub. 590-B, Distributions from Individual Retirement Arrangements (IRAs)
- o Pub. 596, Earned Income Credit (EIC)
- o Pub. 970, Tax Benefits for Education
- o Other (Please specify):

17. In general, how would you rate the following aspects of the electronic publications you used to prepare your 2023 federal income tax return? If you didn't use a particular section of an electronic publication, please select "Not Applicable/Didn't Use."

	Not at all Helpful (1)	Slightly Helpful (2)	Moderately Helpful (3)	Very Helpful (4)	Extremely Helpful (5)	Not applicable/Didn't Use (N/A)
A. What's New	(1)	(2)	(3)	(4)	(5)	(N/A)
B. Index	(1)	(2)	(3)	(4)	(5)	(N/A)
C. Worksheets						

	(1)	(2)	(3)	(4)	(5)	(N/A)
D. Examples	(1)	(2)	(3)	(4)	(5)	(N/A)
E. Flow charts	(1)	(2)	(3)	(4)	(5)	(N/A)
F. Tables	(1)	(2)	(3)	(4)	(5)	(N/A)
G. Tips	(1)	(2)	(3)	(4)	(5)	(N/A)
H. Links in documents	(1)	(2)	(3)	(4)	(5)	(N/A)
I. How To Get Tax Help	(1)	(2)	(3)	(4)	(5)	(N/A)

18. For the statements you marked “Not at all helpful” or “Slightly helpful,” please explain why.

19. If you used an electronic version of any federal tax product (instructions or publications) at IRS.gov, what format of the electronic tax product did you find most beneficial?

- HTML (online)
- PDF (online)
- eBook
- I didn't use an electronic version of any federal tax product at IRS.gov.

20. Which mobile device or tablet did you use, if any, to access any of the following IRS tax products? (Select all that apply)

	Smartphone (1)	Tablet (2)	Did not use either a mobile device or tablet to access tax products. (3)
Tax Forms	(1)	(2)	(3)
Instructions	(1)	(2)	(3)
Publications	(1)	(2)	(3)

21. If the IRS produced an updated electronic version of tax forms that makes it easier to fill out a form and submit it on a mobile device (cell phone or tablet), how likely are you to use this method to submit a tax form on your mobile device?

Very Unlikely	Unlikely	Neither Likely nor Unlikely	Likely	Very Likely
(1)	(2)	(3)	(4)	(5)
(1)	(2)	(3)	(4)	(5)

22. How would you prefer to receive communications from the IRS about changes to federal tax forms and publications?

- IRS.gov
- Social media
- Email
- Other (Please specify):