

Media & Publications - External Customer Satisfaction Survey (ECSS)
2024 Tax Return Preparer

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. Thinking about ease of understanding, how would you rate each of the following federal tax forms? If you didn't use a federal tax form or are unfamiliar with it, please select "Not Applicable/Didn't Use."

	Very Poor (1)	Poor (2)	Neutral (3)	Good (4)	Very Good (5)	Not applicable/Didn't Use (N/A)
A. Form 940, Employer's Annual Federal Unemployment (FUTA) Tax Return	(1)	(2)	(3)	(4)	(5)	(N/A)
B. Form 941, Employer's Quarterly Federal Tax Return	(1)	(2)	(3)	(4)	(5)	(N/A)
C. Form 1040, U.S. Individual Income Tax Return	(1)	(2)	(3)	(4)	(5)	(N/A)
D. Form 1040-SR, U.S. Tax Return for Seniors	(1)	(2)	(3)	(4)	(5)	(N/A)

E. Form 1065, U.S. Return of Partnership Income	(1)	(2)	(3)	(4)	(5)	(N/A)
F. Form 1120, U.S. Corporation Income Tax Return	(1)	(2)	(3)	(4)	(5)	(N/A)
G. Form 1120-S, U.S. Income Tax Return for an S Corporation	(1)	(2)	(3)	(4)	(5)	(N/A)
H. Form 2848, Power of Attorney and Declaration of Representative	(1)	(2)	(3)	(4)	(5)	(N/A)
I. Form 8809, Application for Extensions of Time to File Information Returns	(1)	(2)	(3)	(4)	(5)	(N/A)
J. Form 8821, Tax Information Authorization	(1)	(2)	(3)	(4)	(5)	(N/A)
K. Form 8863, Education Credits (American Opportunity and Lifetime Learning Credits)	(1)	(2)	(3)	(4)	(5)	(N/A)
L. Form 8949, Sales and Other Dispositions of Capital Assets	(1)	(2)	(3)	(4)	(5)	(N/A)
M. Schedule 1 for Additional Income and Adjustments to Income	(1)	(2)	(3)	(4)	(5)	(N/A)
N. Schedule 2 for Additional Taxes	(1)	(2)	(3)	(4)	(5)	(N/A)
O. Schedule 3 for Additional Credits and Payments	(1)	(2)	(3)	(4)	(5)	(N/A)
P. Schedule A for Itemized Deductions	(1)	(2)	(3)	(4)	(5)	(N/A)
Q. Schedule B for Interest and Ordinary Dividends	(1)	(2)	(3)	(4)	(5)	(N/A)
R. Schedule C for Profit or Loss from Business (Sole Proprietorship)	(1)	(2)	(3)	(4)	(5)	(N/A)
S. Schedule D for Capital Gains and Losses	(1)	(2)	(3)	(4)	(5)	(N/A)
T. Schedule E for Supplemental Income and Loss	(1)	(2)	(3)	(4)	(5)	(N/A)
U. Schedule EIC for Earned Income Credit	(1)	(2)	(3)	(4)	(5)	(N/A)
V. Schedule F for Profit or Loss from Farming	(1)	(2)	(3)	(4)	(5)	(N/A)
W. Schedule SE for Self-Employment Tax	(1)	(2)	(3)	(4)	(5)	(N/A)

X. Other (please specify):	
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3. Please tell us how we can improve the federal tax forms you rated as “Very Poor,” “Poor” or “Neutral.”

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4. Thinking about your overall satisfaction, how would you rate each of these publications? If you’ve never used a 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. 225, Farmer’s Tax Guide	(1)	(2)	(3)	(4)	(5)	(N/A)
C. Pub. 463, Travel, Gift, and Car Expenses	(1)	(2)	(3)	(4)	(5)	(N/A)
D. Pub. 501, Dependents, Standard Deduction, and Filing Information	(1)	(2)	(3)	(4)	(5)	(N/A)
E. Pub. 505, Tax Withholding and Estimated Tax	(1)	(2)	(3)	(4)	(5)	(N/A)
F. Pub. 541, Partnerships	(1)	(2)	(3)	(4)	(5)	(N/A)

G. Pub. 542, Corporations	(1)	(2)	(3)	(4)	(5)	(N/A)
H. Pub. 550, Investment Income and Expenses (Including Capital Gains and Losses)	(1)	(2)	(3)	(4)	(5)	(N/A)
I. Pub. 590-A, Contributions to Individual Retirement Arrangements (IRAs)	(1)	(2)	(3)	(4)	(5)	(N/A)
J. Pub. 590-B, Distributions from Individual Retirement Arrangements (IRAs)	(1)	(2)	(3)	(4)	(5)	(N/A)
K. Pub. 596, Earned Income Credit	(1)	(2)	(3)	(4)	(5)	(N/A)
L. Pub. 946, How To Depreciate Property	(1)	(2)	(3)	(4)	(5)	(N/A)
M. Pub. 970, Tax Benefits for Education	(1)	(2)	(3)	(4)	(5)	(N/A)
N. Another publication (please specify):						

5. Please tell us how we can improve the publications you rated as “Very Dissatisfied,” “Dissatisfied” or “Neither Satisfied nor Dissatisfied.”

6. Thinking about your recent experience with federal tax forms, instructions and publications, tell us whether you agree or disagree with each of the following statements:

	Strongly Disagree (1)	Disagree (2)	Neither Agree nor Disagree (3)	Agree (4)	Strongly Disagree (5)	Don't know/Not applicable (N/A)
A. The graphics and layout were easy to follow.	(1)	(2)	(3)	(4)	(5)	(N/A)
B. The print was easy to read.	(1)	(2)	(3)	(4)	(5)	(N/A)
C. It was easy to go back and forth between the instructions and the federal tax form.	(1)	(2)	(3)	(4)	(5)	(N/A)
D. The section headings were useful.	(1)	(2)	(3)	(4)	(5)	(N/A)
E. The publication was easy to understand.	(1)	(2)	(3)	(4)	(5)	(N/A)

F.	The federal tax forms made it easier to make accurate calculations.	(1)	(2)	(3)	(4)	(5)	(N/A)
G.	It was easy to understand the instructions for the federal tax forms.	(1)	(2)	(3)	(4)	(5)	(N/A)
H.	It was easy to understand the federal tax forms.	(1)	(2)	(3)	(4)	(5)	(N/A)
I.	It was easy to find answers in the publications.	(1)	(2)	(3)	(4)	(5)	(N/A)
J.	It was easy to go back and forth between the publication and instructions.	(1)	(2)	(3)	(4)	(5)	(N/A)
K.	The worksheets helped me complete the federal tax forms.	(1)	(2)	(3)	(4)	(5)	(N/A)

7. Please tell us how we can improve your experience on the aspects you rated as “Strongly Disagree,” “Disagree” or “Neither Agree nor Disagree.”

8. In general, how would you rate each of the following aspects of the federal tax instructions you used to prepare 2023 returns? If you didn’t use the identified instructions, 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 (electronic only)	(1)	(2)	(3)	(4)	(5)	(N/A)
I. How To Get Tax Help	(1)	(2)	(3)	(4)	(5)	(N/A)

9. Please tell us how we could improve any of the aspects of tax instructions you rated as “Not at all Helpful,” “Slightly Helpful” or “Moderately Helpful.”

10. Did you know the IRS provides federal tax forms, instructions, and publications in Spanish, Chinese (traditional and simplified), Korean, Russian, or Vietnamese?

- ☐ Yes
- ☐ No

11. In which language other than English did you or your clients need federal tax forms, instructions or publications to prepare 2023 federal income tax returns?

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

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

13. 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)

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

15.What format of the instructions and publications found at IRS.gov are most beneficial?

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

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

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

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