

Survey:

Due Diligence Webinar Survey for Non-Attendees

The purpose of this research is to help the IRS improve Due Diligence webinars for tax preparers like you. You were selected to receive this survey because our records show that you were invited to a Due Diligence webinar and did not attend. Your answers will remain private to the extent allowed by law, and your participation is voluntary. You may stop at any time or skip any question you do not wish to answer.

Your opinions are important because you will be representing tax preparers across the United States and your responses will be used to improve the webinars.

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. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to the, Internal Revenue Service, Special Services, SE:W:CAR:MP:T:M:SP, 1111 Constitution Ave. NW, Room 6129, Washington, DC 20224.

Privacy Act Statement: We are committed to protecting your privacy rights. Our authority for requesting the information is 5 USC 301. The Return Integrity and Compliance Service (RICS) would like to collect feedback from those who do and do not attend the Due Diligence webinar in order to improve the experience for future attendees. Our intention is to keep identities of participants anonymous by aggregating information. Your participation is voluntary. If you do not participate, we will not have the benefit of your input to improve our program. You will have the opportunity to provide written comments, suggestions, or other feedback. We will not share the information you give us outside of IRS employees who need the information, unless required by law. Any information we collect and maintain will be handled in accordance with the access and privacy protection requirements of the Internal Revenue Code, the Privacy Act of 1974, the Freedom of Information Act, and IRS policies and practices. Visit the IRS Electronic Freedom of Information Act Reading Room for more information about these laws. We document much of our internal policy on these laws in IRM 10.5.1, Privacy Policy.

We estimated the time required to be approximately 5 minutes.

1. How long have you been a paid tax return preparer?

0 – 3 years

4 – 10 years

More than 10 years

2. What is your age?

18 – 29

30 – 39

40 – 49

50 – 59
60 and older

3. What tax preparing credentials do you have?
Authorized e-file provider
Certifying Acceptance Agent (CAA) / Acceptance Agent (AA)
Certified Public Accountant (CPA)
Enrolled agent
Tax attorney
Unenrolled tax preparer
Other – Please specify
4. How many tax returns did you complete last year, 2024 (tax year 2023)?
Less than 100
100 – 499
500 – 1000
Over 1000
5. Why didn't you attend the Due Diligence webinar?
Select all that apply.
Attendance was not mandatory
Did not receive or open invitation letter
No need for Due Diligence refresher
Prefer information delivered in a different way (such as email, letter, etc.)
Scheduling conflict at time of webinar
Technology issues
Too busy during filing season
Topic not of interest
Webinar length was too long
Webinar offered only in English
No longer preparing tax returns
I have never been a tax return preparer
I did attend
Other – Please specify
6. Would you consider attending a Due Diligence webinar in the future?
No
Yes
7. What changes to the Due Diligence webinar would make you more likely to attend?
Select all that apply.
Eliminate technological issues
Make the webinar shorter
Offer the webinar at different times of the day
Offer the webinar outside of filing season

Offer the webinar in Spanish
Offer the webinar in another language – Please specify
Other – Please specify
No changes needed

8. Are you aware of the [Tax Preparer Toolkit](#)?

No
Yes

9. (If answered Yes to Question 8). Have you ever used the following resources in the [Tax Preparer Toolkit](#)?

Select all that apply.

Common Due Diligence Situations

Due Diligence Training Module

Due Diligence Videos

Form 886-H-EIC, Documents You Need to Send to Claim the Earned Income Tax Credit (EITC) on the Basis of a Qualifying Child or Children

Handling the Most Common EITC Errors

Nationwide Tax Forum Videos

Publication 4687, Paid Preparer Due Diligence

None of the above

This concludes the survey. Thank you for your participation.

Recruitment Emails:

Due Diligence Webinar Survey for Non-Attendees Notices

Invitation:

Greetings:

You are being invited to take this survey, because our records show you are a tax preparer who was invited to attend a Due Diligence webinar and did not attend.

We are asking for your feedback, so we can improve the Due Diligence webinar.

Survey Information

- Your participation is voluntary.
- Your identity will remain anonymous.
- Responses will be aggregated into a report.
- The survey should take less than 5 minutes to complete.
- See the Taxpayer Services Privacy Policy¹.

Please click to take the [%\[Due Diligence Non-Attendee Survey\]URL%](#).

Thank you in advance for your participation.

If you have comments or feedback regarding this survey, please contact [*TSSS Research Survey Administrator](#).

Need help?

We are committed to providing everyone a voice. If the survey format interferes with your ability to respond due to a disability, such as assistive technology incompatibility, or if you are experiencing other difficulties accessing your survey or have questions, please contact [*TSSS Research Survey Administrator](#).

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Reminder(s):

Greetings:

For those of you that already completed the Due Diligence Webinar Non-Attendee survey, thank you for taking the time. For those of you that have not, we understand that you have many demands on your time or otherwise may not have had an opportunity to take it, but your input is important to us. The information you provide us is vital in helping us improve the Due Diligence webinar.

Please click to take the [%\[Due Diligence Non-Attendee Survey\]URL%](#).

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