

## **Due Diligence Webinar Survey for 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, and attended, a Due Diligence webinar. 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 complete the survey 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 (for tax year 2023)?
  - Less than 100

100 – 499  
500 – 1000  
Over 1000

5. How much of the webinar did you view?

None of the webinar  
Very little of the webinar  
Less than half of the webinar  
More than half of the webinar  
Most of the webinar  
All of the webinar

6. How did you first learn about the Due Diligence webinar?

Employer  
Letter from the IRS  
Notice on Online Account  
Referred by another tax return preparer  
Social media  
Other - Please specify

7. Would you recommend the Due Diligence webinar to other tax return preparers?

No  
Yes

8. Was the information provided during the Due Diligence webinar easy to understand?

No  
Yes

9. Will the Due Diligence webinar help you to fulfil your Due Diligence requirements?

No  
Yes

10. How engaging was the Due Diligence webinar?

Not at all engaging  
Somewhat engaging  
Very engaging

11. What did you like about the Due Diligence webinar?

*Select all that apply.*  
Convenience of the online format  
Ease of joining the webinar  
Information provided in the webinar  
Multiple webinar offerings at different times

The ability to earn continuing education credits  
The length of the webinar  
Timing of the webinar  
Other – Please specify  
None of the above

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

No  
Yes

13. (If answered Yes to Question 12). 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

14. How could the Due Diligence webinar be improved (select all that apply)?

Allow for more attendee interaction  
Eliminate technological issues  
Include more client scenarios  
Shorten the webinar  
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  
Provide more detail on how to complete Form 8867, Paid Preparer's Due Diligence Checklist  
Provide more detail on the Due Diligence requirements  
Provide more detail on what to do after receiving a letter from the IRS about Due Diligence  
Provide more detail about a Due Diligence examination  
Other – Please specify  
No changes needed

15. How do you plan on changing the procedures in your office after attending the Due Diligence webinar?

Ask more probing questions of clients  
Document client responses to questions  
Retain copies of client provided documents

Other - Please specify  
No changes needed

This concludes the survey. Thank you for your participation!