



Introduction

Welcome to the IRS Information Return Burden Survey

Thank you for taking the time to provide us feedback.

Please answer all questions with reference to information returns issued for Tax Year \${e://Field/YEAR}. We encourage you to consult your records or others in your business, if necessary. If these resources are unavailable, please provide your most accurate estimate. At any time you can leave the survey and come back to complete it. The survey will pick up from the last page you completed.

Privacy Act and Paperwork Reduction Act Notice for Information Return Burden Model Data Collection

Our authority for requesting information with this survey is 5 U.S.C. § 301, and 26 U.S.C. 7801, 7803, and 7805 and the Paperwork Reduction Act. The information you provide allows the IRS to analyze the role of taxpayer burden in tax administration. This information is also used to fulfil the IRS's statutory obligations to the Office of Management and Budget and Congress for information required by the Paperwork Reduction Act, and to provide tax policy analysis support to the Office of Tax Analysis at the Department of the Treasury. This information will also help us to better understand taxpayer needs and burden reduction opportunities. Data collected will be shared with IRS staff, but your responses will be used for research and aggregate reporting purposes only and will not be used for other non-statistical or non-research purposes such as direct enforcement activities. The information that you provide will be protected as required by law. We estimate that it will take 15 to 20 minutes to complete this survey, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. 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 taxpayer concerns regarding paperwork reduction. We may not conduct or sponsor, and you are not required to respond to, a collection of information unless it displays a valid OMB control number. The OMB number for this survey is 1545-2212. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden to: IRS, Special Services Section, SE:W:CAR:MP:T:M:S, Room 6129, 1111 Constitution Avenue, NW, Washington, DC 20224.

Please answer all questions for information returns issued by \${e://Field/NAME}.

**Please answer all questions for
information returns issued by**

#{e://Field/NAME}.

When responding to this survey, please do NOT include activities related to preparing and filing any of the following:

- Individual or business federal, state, or local income tax returns such as Forms 1040, 1120, 1120S, and 1065
- Payroll tax returns such as Forms 940, 941, and W-2
- Tax-exempt organization returns such as Form 990
- Foreign tax returns

Information Returns Issued for Tax Year #{e://Field/YEAR}

Which of the following types of information returns, did you or your organization issue for Tax Year #{e://Field/YEAR}?

Select all that apply

- ☐ 1098 (T, E, C, MA, Q, F)
- ☐ 1099 (NEC, MISC, INT, DIV, DA, R, G, S, K, C, A, B, OID, PATR, SA, LTC, Q, H, CAP, SB, LS, QA)
- ☐ 1042 (S, T)
- ☐ W2-G
- ☐ 1096
- ☐ 5498 (SA, ESA, QA)
- ☐ Other

How many information returns (1099, 1098, 1042, W2-G, 1096, 5498 and others) did you or your organization issue to recipients for Tax Year #{e://Field/YEAR}? If you do not know, please provide your best estimate.

Information Returns Issued

You indicated that you or your organization issued zero information returns for Tax Year $\text{\$}\{e://Field/YEAR\}$. Is this correct?

- ☐ Yes
- ☐ No
- ☐ I don't know

How many information returns did you or your organization issue for Tax Year $\text{\$}\{e://Field/YEAR\}$?

Tax Preparation Methods and Activities

Tax Preparation Methods and Activities

Which of the following did you or your organization use to prepare and issue information returns for Tax Year $\text{\$}\{e://Field/YEAR\}$?

Select all that apply

- ☐ A third-party preparer (e.g., accountant including certified public accountants (“CPA”), bookkeeper, lawyer, enrolled agent, registered tax preparer, H&R Block)
- ☐ Tax preparation software (e.g., QuickBooks, Yearly, TaxAct, IRIS, CCH® ProSystem fx® Suite, custom software)
- ☐ Any other method(s)

Tax-Related Recordkeeping

Tax Related Recordkeeping

Please think about your information return-related recordkeeping. This recordkeeping includes all the activities you or your organization did to create, maintain, and store records needed to prepare and issue information returns for Tax

Year \${e://Field/YEAR}.

Which of the following recordkeeping systems did you or your organization use to keep track of records used to prepare and issue information returns for Tax Year \${e://Field/YEAR}?

Select all that apply

- ☐ General recordkeeping software products (e.g. Excel, IBM Notes, OpenOffice)
- ☐ Accounting and/or financial software (e.g. QuickBooks™, SAGE®)
- ☐ Paper records of financial transactions (e.g. ledger)
- ☐ A third-party paid preparer (e.g., accountant including certified public accountants ("CPA"), bookkeeper, lawyer, enrolled agent, registered tax preparer, H&R Block)
- ☐ Any other tax-related recordkeeping system

Time Spent Computer

Time Spent on Information Return-Related Activities

Think about all the time you or your organization spent on information return-related recordkeeping, gathering tax-related materials, learning about tax law, using IRS or non-IRS resources, completing, reviewing, and issuing information returns for Tax Year \${e://Field/YEAR}.

Please include time spent:

- Preparing and issuing federal information returns
- Corresponding or speaking with paid or volunteer tax professional(s), if any
- Throughout the tax year as well as the tax filing season, as applicable

Please do NOT include time spent:

- By paid or volunteer tax professional(s)
- On individual or business federal, state, or local income tax returns such as Forms 1040, 1120, 1120S, and 1065
- On payroll tax returns such as Forms 940, 941, and W-2
- On tax-exempt organization returns such as Form 990
- On foreign tax returns
- Responding to IRS notices or correspondence

How much time did you or your organization spend on the following activities related to information returns issued for Tax Year \${e://Field/YEAR}?

If you're not sure, please provide your best estimate. If you or your organization did not spend any time on the activity, enter 0.

	Hours	Minutes
A. Tax recordkeeping. This includes time spent on activities such as creating, tracking, obtaining, organizing and storing records.	0	0
B. Gathering materials, learning about tax law, and using IRS or non-IRS resources.	0	0
C. Preparing information returns.	0	0
D. Issuing information returns to taxpayers. This includes time spent on activities such as printing, mailing, and supporting opt-in electronic access.	0	0
E. Fixing issues with information returns prior to submission to the IRS. This includes time spent on activities such as addressing recipient issues, requesting and tracking down missing or erroneous data, and issuing amended documents to recipients.	0	0
F. Submitting information returns to the IRS. This includes activities such as electronic submission, printing, and mailing.	0	0
G. Preparing and issuing corrected information returns after submission to the IRS. This includes activities such as addressing recipient issues, requesting and tracking down missing or erroneous data, issuing amended documents to recipients, and submitting corrected documents to the IRS.	0	0
H. Other information return-related activities	0	0

You reported spending a total of 0 hour(s) and 0 minute(s) on information return-related activities. Would you like to review your answers?

- ☒ Yes, I'd like to review my answers
- ☐ No, I'd like to continue to the next question

How much time did you or your organization spend on the following activities related to information returns issued for Tax Year \$(e://Field/YEAR)?

If you're not sure, please provide your best estimate. If you or your organization did not spend any time on the activity, enter 0.

	Hours	Minutes
A. Tax recordkeeping. This includes time spent on activities such as creating, tracking, obtaining, organizing and storing records.	\$(q://l)	\$(q://l)

	Hours	Minutes
B. Gathering materials, learning about tax law, and using IRS or non-IRS resources.		
C. Preparing information returns.		
D. Issuing information returns to taxpayers. This includes time spent on activities such as printing, mailing, and supporting opt-in electronic access.		
E. Fixing issues with information returns <u>prior</u> to submission to the IRS. This includes time spent on activities such as addressing recipient issues, requesting and tracking down missing or erroneous data, and issuing amended documents to recipients.		
F. Submitting information returns to the IRS. This includes activities such as electronic submission, printing, and mailing.		
G. Preparing and issuing corrected information returns <u>after</u> submission to the IRS. This includes activities such as addressing recipient issues, requesting and tracking down missing or erroneous data, issuing amended documents to recipients, and submitting corrected documents to the IRS.		
H. Other information return-related activities		

You reported spending time on other information return-related activities. Please describe those activities

You reported spending time on other information return-related activities. Please describe those activities

What is the average hourly pay rate for all the employees responsible for the information return-related activities previously reported?

Please do not include benefits or overhead. If you're not sure what the average hourly pay rate was, please provide your best estimate.

\$

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\$

Time Spent Mobile

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Please include time spent:

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- On foreign tax returns
- Responding to IRS notices or correspondence

How much time did you or your organization spend on the following activities related to information returns issued for Tax Year \${e://Field/YEAR}?

If you're not sure, please provide your best estimate. If you or your organization did not spend any time on the activity, enter 0.

A. Tax Recordkeeping. This includes time spent on activities such as creating, tracking, obtaining, organizing and storing records.

	Hours	Minutes
Tax recordkeeping.	0	0

B. Gathering materials, learning about tax law, and using IRS or non-IRS resources.

	Hours	Minutes
Gathering materials, learning about tax law, and using IRS or non-IRS resources.	0	0

C. Preparing information returns.

	Hours	Minutes
Preparing information returns.	0	0

D. Issuing information returns to taxpayers. This includes time spent on activities such as printing, mailing, and supporting opt-in electronic access.

	Hours	Minutes
Issuing information returns to taxpayers.	0	0

E. Fixing issues with information returns prior to submission to the IRS. This includes time spent on activities such as addressing recipient issues, requesting and tracking down missing or erroneous data, and issuing amended documents to recipients.

	Hours	Minutes
Fixing issues with information returns.	0	0

F. Submitting information returns to the IRS. This includes activities such as electronic submission, printing, and mailing.

	Hours	Minutes
Submitting information returns to the IRS.	0	0

G. Preparing and issuing corrected information returns after submission to the IRS.

This includes activities such as addressing recipient issues, requesting and tracking down missing or erroneous data, issuing amended documents to recipients, and submitting corrected documents to the IRS.

	Hours	Minutes
Preparing and issuing corrected information returns <u>after</u> submission to the IRS	0	0

H. Other information return-related activities.

	Hours	Minutes
Other information return-related activities	0	0

You reported spending a total of 0 hour(s) and 0 minute(s) on information return-related activities. Would you like to review your answers?

- ☐ Yes, I'd like to review my answers
- ☐ No, I'd like to continue to the next question

How much time did you or your organization spend on the following activities related to information returns issued for Tax Year **\$(e://Field/YEAR)?**

If you're not sure, please provide your best estimate. If you or your organization did not spend any time on the activity, enter 0.

	Hours	Minutes
A. Tax recordkeeping.		
B. Gathering materials, learning about tax law, and using IRS or non-IRS resources.		
C. Preparing information returns.		
D. Issuing information returns to taxpayers.		
E. Fixing issues with information returns <u>prior</u> to submission to the IRS.		
F. Submitting information returns to the IRS.		
G. Preparing and issuing corrected information returns <u>after</u> submission to the IRS.		
H. Other information return-related activities		

You reported spending time on other information return-related activities. Please describe those activities

You reported spending time on other information return-related activities. Please describe those activities

What is the average hourly pay rate for all the employees responsible for the information return-related activities previously reported?

Please do not include benefits or overhead. If you're not sure what the average hourly pay rate was, please provide your best estimate.

What is the average hourly pay rate for all the employees responsible for the information return-related activities previously reported?

Please do not include benefits or overhead. If you're not sure what the average hourly pay rate was, please provide your best estimate.

Costs Associated with Information Tax Returns

Costs Associated with Information Return-Related Activities

Think about how much money you or your organization spent to prepare and issue information returns for Tax Year `$(e://Field/YEAR)`.

If you're not sure, please provide your best estimate. If you did not spend any money on the activity, enter 0.

Please include costs:

- Associated with preparing and issuing information returns that you or your organization prepared and/or issued directly
- Paid to a third-party preparer to prepare and issue information returns on you or your organizations behalf, if any

Please do NOT include costs for:

- Individual or business federal, state, or local income tax returns such as Forms 1040, 1120, 1120S, and 1065
- Payroll tax returns such as Forms 940, 941, and W-2
- Tax-exempt organization returns such as Form 990
- Foreign tax returns
- Responding to IRS notices or correspondence

Internal Costs

How much money did you or your organization spend on the following during Tax Year `$(e://Field/YEAR)`?

If you're not sure, please provide your best estimate. If there were no costs enter 0.

A. Purchasing, creating, or updating tax-specific software (either off the shelf or customized)	\$ 0
B. Paper, postage, and equipment	\$ 0
Total	\$ 0

Paid Third-Party Preparer Costs

How much money did you or your organization pay for the following activities paid to third-party preparers during Tax Year {{e://Field/YEAR}}?

If you're not sure, please provide your best estimate. If you or your organization did not use a third-party prepare for any of the activities listed below enter 0.

A. Recordkeeping services related to information returns issued for Tax Year {{e://Field/YEAR}}	\$ 0
B. Preparing information returns	\$ 0
C. Issuing information returns to taxpayers	\$ 0
D. Fixing issues with information returns <u>prior</u> to submission to the IRS	\$ 0
E. Submitting information returns to the IRS	\$ 0
F. Preparing and issuing corrected information returns <u>after</u> submission to the IRS	\$ 0
G. Other information return-related activities	\$ 0
Total	\$ 0

You reported spending money on other information return-related activities. Please describe those activities.

You indicated you or your organization spent {{q://QID196/TotalSum}} in third-party preparer fees for {{q://QID93/ChoiceTextEntryValue}} information returns. Would you like to revise these amounts?

☐ Yes, I'd like to revise the amount spent
 ☐ Yes, I'd like to revise the number of information returns
 ☐ No, revisions are not needed

Please enter revised amount spent in third-party preparer fees

Please enter revised number of information returns issued

Regarding costs, we know it may be difficult to separate the cost for information return-related activities from additional services provided by a third-party preparer. Were any other services included in the amounts you reported such as preparation of Forms 1040, 1120, 1120-S, 1065, 940, 941, W2, or 990?

☐ Yes

☐ No

Please describe the additional services

Considering all aspects of information return-related activities, what do taxpayers find to be the most difficult part of complying with information return reporting requirements?

Please provide any suggestions for how the IRS could improve the information return reporting experience or taxpayer service in general.

Finish

You have finished the survey.

Please click on the "Submit" button to submit your survey. Once submitted, you will not be able to return to the survey.

[FAQ](#)

Technical Assistance 202-803-9147 or raas.irs.taxpayer.surveys@irs.gov

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