



English



Introduction - new

Welcome to the IRS

Individual Taxpayer Burden Survey

For this survey, we will first cover some common activities you may have done throughout the year for your $\{e://Field/YEAR\}$ federal income tax return, such as *recordkeeping, tax planning, gathering tax materials, and completing your return.*

Next, we will then ask you to estimate the amount of **time** and **money** you spent on these tax-related activities. Please answer each question to the best of your ability. If you are unsure about your answer, it's okay to make an estimate. Your responses will only be used for taxpayer research purposes. You will not be asked to provide financial records.

You will also have the opportunity to share your experiences with these tax-related activities and suggest how the Internal Revenue Service (IRS) can make it easier for you to file and pay your taxes.

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. If you have questions about the survey, you can call 855-481-5530 or send an email to raas.irs.taxpayer.surveys@irs.gov.

You can find a Frequently Asked Questions (FAQ) document below. It will be available throughout the survey.

Privacy Act and Paperwork Reduction Act Notice for Taxpayer 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.

General Questions About Your Taxes

General Questions About Your Taxes

The questions below ask about the ways in which you completed your **#{e://Field/YEAR}** federal income tax return.

How did you complete your **#{e://Field/YEAR} federal income tax return?**

Select all that apply

- ☐ I did it myself using paper forms
- ☐ I used a tax preparation website, software, or mobile app (e.g. TurboTax, TaxAct, or H&R Block At Home)
- ☐ I had expert assistance from someone such as a paid preparer, a paid professional (e.g., a bookkeeper, enrolled agent, accountant, or lawyer), an employee of my business, or an unpaid volunteer

Why did you choose this method for completing your \${e://Field/YEAR} federal income tax return?

Select all that apply

- ☐ Ease of use
- ☐ Time
- ☐ Familiarity with method
- ☐ Cost
- ☐ To ensure that my tax return was completed accurately
- ☐ To receive all of the deductions, credits, and refunds for which I was qualified
- ☐ To reduce the risk of audit
- ☐ Other

Recordkeeping

Recordkeeping

The following questions ask about the records, including forms you may have received from your employer or financial institutions, as well as tax-related documents you may have kept in order to prepare your \${e://Field/YEAR} federal income tax return.

Whether or not you used them, which of the following records did you keep for your \${e://Field/YEAR} federal income tax return?

Select all that apply

- ☐ Prior year federal income tax returns

- ☐ **Documentation of nonbusiness income**
Such as W-2s, interest, dividends, sales of stock, royalties, rental income, alimony received, IRA distributions, pension distributions
- ☐ **Documentation of nonbusiness expenses**
Such as educator expenses, moving expenses, alimony paid, home mortgage interest, property taxes, charitable contributions, casualty and theft losses, unreimbursed employee expenses
- ☐ **Documentation of business income and expenses**
Such as invoices, business bank account statements, partnership or S corporation income, canceled checks, taxes and licenses, advertising costs, depreciation
- ☐ **Documentation of credits**
Such as the earned income tax credit (EITC), child tax credit, child and dependent care credit, education credit, energy credit
- ☐ **Other tax-related items**

Thinking about all of the records you kept for your \${e://Field/YEAR} federal income tax return, did you also keep them for other reasons, such as business or personal reasons?

- ☐ Yes
- ☐ No

Tax Planning

Tax Planning

The following section asks about any tax planning you may have done for your \${e://Field/YEAR} federal income tax return. Tax planning includes any strategies

taxpayers use to reduce the taxes they owe, such as participating in a retirement account, making charitable donations, or buying or selling assets.

Whether or not you did them, did you consider the tax implications of any of the following as part of your overall planning for your \${e://Field/YEAR} federal income tax return?

Select all that apply

- ☐ Buying or selling real estate, including your home
- ☐ Participating in or maintaining a retirement account such as a 401(k), any type of IRA, or a pension plan
- ☐ Investing in non-retirement tax-exempt or tax preferred investments or plans such as tax-free bonds or education savings programs
- ☐ Buying or selling other investments such as stocks, bonds, or other securities
- ☐ Buying or disposing of assets such as equipment or supplies for a business
- ☐ Structuring your business, such as deciding whether to form a partnership, LLC, or corporation
- ☐ Making charitable contributions
- ☐ Making energy efficient improvements to your home
- ☐ Purchasing or financing a vehicle
- ☐ Taking college or other educational classes
- ☐ Other
- ☐ None of the above

Completing Your Tax Return

Completing Your Tax Return

Which of the following resources (if any) did you use when completing your $\{e://Field/YEAR\}$ federal income tax return?

Select all that apply

- ☐ IRS website
- ☐ IRS toll-free tax assistance line
- ☐ IRS walk-in site
- ☐ IRS tax forms or publications from a library or post office
- ☐ IRS2GO mobile app
- ☐ Tax preparation website, software, or mobile app
- ☐ Internet search engines
- ☐ Artificial Intelligence (AI) platforms
- ☐ Social media or blogs
- ☐ TV, newspapers, or magazines
- ☐ Seminars or classes
- ☐ Other
- ☐ None of the above

Who (if anyone) helped you, however briefly, with your $\{e://Field/YEAR\}$ federal income tax return?

Select all that apply

- ☐ My spouse
- ☐ Other family member(s) or friend(s)
- ☐ Employee(s) of my business
- ☐ Tax professional(s) (paid or volunteer)
- ☐ Other

- ☐ No one helped me

Which of the following best describes how you used IRS tax form instructions when completing your \${e://Field/YEAR} federal income tax return?

- ☐ Read most or all instructions
- ☐ Read instructions as needed
- ☐ Did not read instructions

If you used a paid or volunteer tax professional, how did you work with them when completing your \${e://Field/YEAR} federal income tax return?

Select all that apply

- ☐ Did not use a paid or volunteer tax professional
- ☐ Completed a tax questionnaire or worksheet for my paid or volunteer professional
- ☐ Provided records to my paid or volunteer professional
- ☐ Met with my paid or volunteer professional in person
- ☐ Communicated with my paid or volunteer professional by telephone, email, text message, and/or video chat
- ☐ Completed and reviewed my tax return with my paid or volunteer professional
- ☐ Other

If you used a tax preparation website, software, or mobile app to complete your \${e://Field/YEAR} federal income tax return, which of the

following best describes your use of step-by-step instructions?

- ☐ Did not use a tax preparation website, software, or mobile app
- ☐ Followed the entire step-by-step guided instructions
- ☐ Only used the step-by-step guided instructions to address specific tax areas
- ☐ Directly entered information into the tax forms without using the step-by-step guided instructions

When preparing your \${e://Field/YEAR} federal income tax return, did you electronically import, upload, or photo scan any of the following information so that it did not have to be typed or entered by hand?

Select all that apply

- ☐ Did not electronically import any information
- ☐ Data from last year's tax preparation software
- ☐ Data from an accounting software package, such as Quicken, MSN Money or QuickBooks
- ☐ Data from my W-2s
- ☐ Data from my 1098s, 1099s, Schedule K-1s, or other information returns
- ☐ Data from my bank, brokerage, or other financial accounts
- ☐ Don't know

Time Spent on Tax-Related Activities

Time Spent on Tax-Related Activities

The next questions ask about the time you spent on activities related to the completion of your \${e://Field/YEAR} federal income tax return.

Please include time spent:

- On your federal income tax return, including Form 1040, as well as any associated forms, schedules, and worksheets that you completed or filed throughout the tax year as well as the tax filing season
- By your family, friends, or business employees, however briefly
- Corresponding or meeting with your tax preparer
- Traveling to places such as the library, post office, or a tax preparer's office

Please do NOT include time spent:

- On state or local income tax returns
- On anyone else's federal income tax return
- Responding to IRS notices or correspondence
- Amending an income tax return
- Checking the status of your electronic submission or refund
- On other tax returns including partnerships (Form 1065), corporations (Form 1120 or 1120S), gifts (Form 709), trusts and estates (Form 706 or 1041), employment tax (Form 940, 941, 943, 944, 945), or excise tax (Form 720)

Time Spent on Tax-Related Activities

The next questions ask about the time you spent on activities related to the completion of your `{e://Field/YEAR}` federal income tax return.

Please include time spent:

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How much time did you spend on the following activities for your {e://Field/YEAR} federal income tax return?

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

	Hours	Minutes
A. Recordkeeping		
<i>Include time spent on activities such as:</i>		
<i>Keeping track of tax-related information, such as records or receipts</i>		
<i>Collecting and organizing your tax-related records</i>	0	0
<i>Making a special effort to obtain records or receipts</i>		

Do NOT include time spent on non-tax-related business or personal recordkeeping.

Hours

Minutes

B. Tax Planning

Include time spent on activities such as:

- *Calculating or changing withholding or estimated payments*
- *Researching strategies to reduce the taxes you owe such as making charitable donations, participating in a retirement account, or buying or selling investments*
- *Working with a tax professional (paid or volunteer) on tax planning*
- *Doing business tax planning related to your personal tax situation*

0

0

C. Gathering or purchasing materials

Include time spent on activities such as:

- *Gathering IRS tax forms, instructions, or publications*
- *Selecting, buying, and installing tax preparation software or mobile app*
- *Selecting a tax preparation website*
- *Selecting a tax professional (paid or volunteer)*

0

0

Hours

Minutes

D. Completing and submitting your tax return*Include time spent on activities such as:*

- *Reading instructions and related materials*
- *Obtaining answers to questions about your return*
- *Completing and reviewing tax forms or worksheets, whether or not they were submitted*
- *Working with a tax professional (paid or volunteer) to complete your tax return*
- *Assembling and submitting your tax return*

0

0

OB3 Time Questions

You reported spending \${e://Field/Total_Hours} hour(s) and \${e://Field/Total_Minutes} minute(s) on activities related to the completion of your \${e://Field/YEAR} federal income tax return. Does this include any time spent on the following?

Select all that apply

- ☐ No tax on tips
- ☐ No tax on overtime
- ☐ No tax on car loan interest
- ☐ Itemized deductions for certain state and local taxes (e.g., real estate taxes, state income taxes)
- ☐ None of the above

How much time did you spend on the following items?

	1-15 minutes	16-30 minutes	31-60 minutes	More than 60 minutes
No tax on tips	☐	☐	☐	☐
No tax on overtime	☐	☐	☐	☐
No tax on car loan interest	☐	☐	☐	☐
Deduction for certain state and local taxes (e.g., real estate taxes, state income taxes)	☐	☐	☐	☐

Costs of Completing Your Tax Return

Money Spent Completing Your Tax Return

The next questions ask about the money you spent to complete your

{e://Field/YEAR} federal income tax return.

Please include money spent:

- On your federal income tax return, including Form 1040, as well as any associated forms, schedules, and worksheets that you completed or filed
- Throughout the tax year as well as the tax filing season

Please do NOT include money spent:

- On state or local income tax returns
- On anyone else's federal income tax return
- Responding to IRS notices or correspondence
- Amending an income tax return
- On other tax returns including partnerships (Form 1065), corporations (Form 1120 or 1120S),

Please include money spent:

Please do NOT include money spent:

gifts (Form 709), trusts and estates (Form 706 or 1041), employment tax (Form 940, 941, 943, 944, 945), or excise tax (Form 720)

Money Spent Completing Your Tax Return

The next questions ask about the money spent to complete your `{e://Field/YEAR}` federal income tax return.

Please include money spent:

- On your federal income tax return, including Form 1040, as well as any associated forms, schedules, and worksheets that you completed or filed
- Throughout the tax year as well as the tax filing season

Please do NOT include money spent:

- On state or local income tax returns
- On anyone else's federal income tax return
- Responding to IRS notices or correspondence
- Amending an income tax return
- On other tax returns including partnerships (Form 1065), corporations (Form 1120 or 1120S), gifts (Form 709), trusts and estates (Form 706 or 1041), employment tax (Form 940, 941, 943, 944, 945), or excise tax (Form 720)

How much money did you spend on the following products or services to complete your \${e://Field/YEAR} federal income tax return?

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

	\$	0
	\$	0
	\$	0
	\$	0
	\$	0
Total	\$	0

Paid preparer services and tax software are often paid as one fee. We know it may be difficult to separate the cost for your \${e://Field/YEAR} federal income tax return from additional services provided.

Were any of the following services included in the reported money you spent on paid preparer services or tax software?

Select all that apply

- ☐ Did not pay a fee to a paid preparer
- ☐ Prepared forms for a partnership, corporation, estate, gift, trust, employment tax, or excise tax
- ☐ Electronic filing fees
- ☐ Prepared state, local, or city tax return
- ☐ Amended previous year tax returns
- ☐ Responded to IRS notices or an audit
- ☐ Audit protection costs
- ☐ Don't know
- ☐ None of the above

OB3 Costs

You reported spending $\$ \{e://Field/TotalMoney\}$ to complete your $\$ \{e://Field/YEAR\}$ federal income tax return. Does this include any money spent on the following?

Select all that apply

- ☐ No tax on tips
- ☐ No tax on overtime
- ☐ No tax on car loan interest
- ☐ Deduction for certain state and local taxes (e.g., real estate taxes, state income taxes)
- ☐ None of the above

How much did you spend on the following? If you're not sure, please provide your best estimate.

	Dollars
No tax on tips	
No tax on overtime	
No tax on car loan interest	
Deduction for certain state and local taxes (e.g., real estate taxes, state income taxes)	

Tell Us About You

Tell Us About You

Compared to previous years, did you spend about the same amount of time, more time, or less time on your \${e://Field/YEAR} federal income tax return? Include all time spent from recordkeeping through submission of the form to the IRS.

- ☐ Same amount of time
- ☐ More time
- ☐ Less Time

Which of the following contributed to spending less time on your \${e://Field/YEAR} federal income tax return?

Select all that apply

- ☐ Changes in tax law
- ☐ Changes in family
- ☐ Changes in employment
- ☐ Changes in tax preparation or filing method
- ☐ Other

Which of the following contributed to spending more time on your \${e://Field/YEAR} federal income tax return?

Select all that apply

- ☐ Changes in tax law
- ☐ Changes in family

- ☐ Changes in employment
- ☐ Changes in tax preparation or filing method
- ☐ Other

Compared to previous years, did you spend about the same amount of money, more money, or less money to complete your $\$ \{e://Field/YEAR\}$ federal income tax return? Include all money spent.

- ☐ Same amount of money
- ☐ More money
- ☐ Less money

Which of the following contributed to spending more money on your $\$ \{e://Field/YEAR\}$ federal income tax return?

Select all that apply

- ☐ Typical increases to software or service fees
- ☐ Changes in tax law
- ☐ Changes in family
- ☐ Changes in employment
- ☐ Changes in tax preparation or filing method
- ☐ Other

Which of the following contributed to spending less money on your \${e://Field/YEAR} federal income tax return?

Select all that apply

- ☐ Changes in tax law
- ☐ Changes in family
- ☐ Changes in employment
- ☐ Changes in tax preparation or filing method
- ☐ Other

Did you file a \${e://Field/YEAR} state income tax return?

- ☐ Yes
- ☐ No

For which state(s) did you file a \${e://Field/YEAR} state income tax return?

How would you rate your confidence in your tax knowledge when completing your federal income tax return?

- ☐ Very low
- ☐ Low
- ☐ Moderate
- ☐ High
- ☐ Very high

What is the highest level of education that you have completed?

- ☐ Less than a high school diploma
- ☐ High school graduate or GED
- ☐ Some college or some technical school
- ☐ Associate's degree or professional certificate
- ☐ Bachelor's degree
- ☐ Master's or doctorate degree

suggestions

Please share any suggestions you have for how the IRS could improve taxpayer services or make it easier for you to file and pay your taxes.

Finish

You're almost done! To complete the survey, click the "Submit" button below.

Once the survey is submitted, you will not be able to return to the survey to view or edit your responses.

[FAQ](#)

Technical Assistance **1.855.481.5530** or raas.irs.taxpayer.surveys@irs.gov

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