



English



Default Question Block

Welcome to the IRS Amended Individual Taxpayer Burden Survey

Thank you for taking the time to provide us feedback. This survey is about the time and money you spent to amend your \${e://Field/YEAR} federal income tax return. 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 need assistance, please email us at raas.irs.taxpayer.surveys@irs.gov or call 202-803-9417. You can find a Frequently Asked Questions (FAQ) document and copy of the full survey in links below. These links 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 10 to 15 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.

Reason Amending

Reason for Amending Your Federal Income Tax Return

Why did you amend your \${e://Field/YEAR} federal income tax return?

Select all that apply

- ☐ Received a new information return (such as W-2, 1099) after filing my federal income tax return
- ☐ Realized I made a mistake on my federal income tax return
- ☐ Received a notice about a different year's federal income tax return
- ☐ My preparer told me I needed to file an amended return
- ☐ Other

Reviewing and Gathering

Reviewing and Gathering Tax-Related Materials

Whether or not you used them, which of the following types of information did you review or gather to amend your \${e://Field/YEAR} federal income tax return?

Select all that apply

☐ **The federal income tax return I amended**

Such as forms 1040, 1040A, or 1040EZ

☐ **Federal income tax returns from other years**

Such as forms 1040, 1040A, or 1040EZ

☐ **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 deductions**

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, cancelled 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

☐ **Other tax related items**

Actions Taken

Actions Taken to Amend Your Federal Income Tax Return

Which of the following did you do while amending your \${e://Field/YEAR} federal income tax return?

Select all that apply

- ☐ Called the IRS to get answers to tax questions
- ☐ Got IRS forms and publications
- ☐ Searched irs.gov
- ☐ Searched a non-IRS website
- ☐ Consulted with friends or family members
- ☐ Consulted with a paid or volunteer tax professional
- ☐ Contacted the IRS by phone or internet to confirm they received my amended return
- ☐ Other
- ☐ Not applicable or none of the above

Working with Tax Pro

Working with a Tax Professional

Did you use a paid or volunteer tax professional you to amend your $\{e://Field/YEAR\}$ federal income tax return?

- ☐ Yes
- ☐ No

Which of the following describes the paid or volunteer tax professional you used to amend your $\{e://Field/YEAR\}$ federal income tax return?

- ☐ Worked with the same tax professional that prepared my federal income tax return
- ☐ Worked with a different tax professional from the same firm or company that prepared my federal income tax return
- ☐ Worked with a tax professional from a different firm or company than the one that prepared my federal income tax return

Which of the following describes why you used a tax professional to amend your $\{e://Field/YEAR\}$ federal income tax return?

Select all that apply

- ☐ Was unsure of how to proceed
- ☐ Use a tax professional for all tax matters
- ☐ Didn't have time to amend the return on my own
- ☐ The issue seemed too complex to resolve on my own
- ☐ Attempted to amend the return on my own, but later decided to seek professional tax help
- ☐ Other

Which of the following best describes your tax professional's fee for helping you amend your $\{e://Field/YEAR\}$ federal income tax return?

Select all that apply

- ☐ Flat fee
- ☐ Hourly rate
- ☐ Service was included with the preparation of my federal income tax return
- ☐ Free services (*Such as low income tax clinic or volunteer tax professional*)

- ☐ Other

- ☐ Don't Know

Time Spent

Time Spent Amending Your Federal Income Tax Return

The next questions focus on the time you, your family members, friends, or other unpaid volunteers spent amending your $\{e://Field/YEAR\}$ federal income tax return.

Please include time spent:

- *By you, your family members, friends, or other unpaid volunteers actively working to amend your federal income tax return*

Please do NOT include time spent:

- *Waiting on the IRS or your tax professional to respond to you*
- *Filing federal income tax returns not required to amend your federal income tax return*
- *Filing any state income tax returns*
- *By a paid tax professional who may have helped you amend your federal income tax return*

How much time did you spend on the following activities for your \$*{e://Field/YEAR}* amended federal income tax return? If you're not sure, please provide an estimate. If you did not spend any time on the activity, enter 0.

Hours

Minutes

A. Reviewing and gathering tax-related materials

Include time spent on activities such as:

- *Reading instructions or publications*
- *Reviewing your federal income tax returns*
- *Consulting with family members or friends*
- *Obtaining or recreating tax-related documentation*
- *Copying, printing, or scanning tax-related documents*

0

0

Hours

Minutes

B. Interacting with the IRS*Include time spent on activities such as:*

- *On the telephone with IRS employees*
- *Visiting a local IRS office (include travel time)*
- *Searching irs.gov*
- *Completing and submitting tax forms or documentation*
- *Making a payment based on your amended federal income tax return*

C. Working with a tax professional*Include time spent on activities such as:*

- *Searching for and selecting your tax professional*
- *Meeting face to face with your tax professional (include travel time)*
- *Telephone calls with your tax professional*
- *Exchanging emails with your tax professional*

D. Other

You reported 0 hour(s) and 0 minute(s) on other activities related to your \${e://Field/YEAR} amended federal income tax return. Please describe those activities.

You reported spending a total of 0 hour(s) and 0 minute(s) on activities to amend your $\{e://Field/YEAR\}$ federal income tax return. 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 spend on the following activities to amend your $\{e://Field/YEAR\}$ federal income tax return?

	Hours	Minutes
A. Reviewing and Gathering Tax-Related Materials	$\{q://\}$	$\{q://\}$
B. Interacting with the IRS	$\{q://\}$	$\{q://\}$
C. Working with a Tax Professional	$\{q://\}$	$\{q://\}$
D. Other	$\{q://\}$	$\{q://\}$

Cost

Costs Associated with Amending Your Federal Income Tax Return

The next questions ask about the costs associated with amending your $\{e://Field/YEAR\}$ federal income tax return.

Please include costs associated with:

- Money you spent while actively working to amend your federal

Please do NOT include costs associated with:

- Any tax, penalties, and interest related to your post-filing issue

Please include costs associated with:*income tax return***Please do NOT include costs associated with:**

- Filing any federal or state income tax returns not required to amend your federal income tax return*

How much did you pay for the following products or services to amend 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.

A. Paid tax preparation and advice

Include money paid to a tax professional or to purchase tax software specifically to amend your federal income tax return

\$ **B. Postage, travel, and other related costs**

Include money paid for:

- Postage, envelopes, and other mail-related costs*
- Copying, faxing, or scanning of documents*
- Travel related to amending your federal income tax return*
- Other products and services necessary to amend your federal income tax return*

\$ **C. Other**\$ *Total*\$

You reported spending \${q://QID65/ChoiceNumericEntryValue/50} on other activities related to your \${e://Field/YEAR} amended federal income tax return. Please describe those activities.

Your Experience

Your Experience Amending Your Federal Income Tax Return

When amending your \${e://Field/YEAR} federal income tax return, how stressful was each of the following...

Finding out what to do next?

- ☐ *Not at all stressful*
- ☐ *A little stressful*
- ☐ *Somewhat stressful*
- ☐ *Very stressful*
- ☐ *I did not do this activity*

Finding the forms you needed to amend your return

- ☐ *Not at all stressful*
- ☐ *A little stressful*
- ☐ *Somewhat stressful*
- ☐ *Very stressful*
- ☐ *I did not do this activity*

Finding out where to send your amended return

- ☐ *Not at all stressful*
- ☐ *A little stressful*
- ☐ *Somewhat stressful*
- ☐ *Very stressful*
- ☐ *I did not do this activity*

Finding out whether the IRS had received your amended return

- ☐ *Not at all stressful*
- ☐ *A little stressful*
- ☐ *Somewhat stressful*
- ☐ *Very stressful*
- ☐ *I did not do this activity*

Worrying about penalties for underpayment of tax

- ☐ *Not at all stressful*
- ☐ *A little stressful*
- ☐ *Somewhat stressful*
- ☐ *Very stressful*
- ☐ *I did not do this activity*

Taking time off from your job

- ☐ *Not at all stressful*
- ☐ *A little stressful*

- ☐ *Somewhat stressful*
- ☐ *Very stressful*
- ☐ *I did not do this activity*

The IRS now offers taxpayers the option of creating an online account. Which of the following features would you find most useful?

- ☐ *Personal profile that allows the IRS to send you information tailored to your tax filing situation*
- ☐ *Ability to customize information on the IRS website that meets your interests*
- ☐ *Access to prior-year tax returns*
- ☐ *Online payment options*
- ☐ *Access to tax payment history*
- ☐ *Ability to upload supporting documentation when you file your return or respond to an IRS notice*
- ☐ *Immediate error check when you file your taxes online*
- ☐ *Other*

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*

Please suggest how the IRS could improve taxpayer services or reduce the compliance burden of amending your federal income tax return.

What was the most difficult part of amending your federal income tax return?

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 response.

[FAQ](#)
[English preview](#)
[Spanish preview](#)

Technical Assistance 1.202.803.9147 or raas.irs.taxpayer.surveys@irs.gov

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