



English



Introduction

Welcome to the IRS Taxpayer Compliance Burden Survey

Thank you for taking the time to provide us feedback. This survey is about post-filing issues related to 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 have questions about the survey, you can call 202-803-9147 or send an email to raas.irs.taxpayer.surveys@irs.gov. 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 Compliance Burden Survey

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.

General Questions

This survey is about post-filing issues related to your \${e://Field/Year} federal income tax return

General Question about Your Post-Filing Issue

What did you do when you received the first notice about your \${e://Field/Year} federal income tax return?

Select all that apply

- ☐ Opened the envelope and read the first notice
- ☐ Took the first notice unopened to a paid or volunteer tax professional
- ☐ Did not open the first IRS notice, but did open a subsequent notice
- ☐ Did something else with the first notice

Reviewing and Gathering Tax-Related Materials

This survey is about post-filing issues related to your {e://Field/Year} federal income tax return

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 resolve your post-filing issue?

Select all that apply

☐ The federal income tax return for my post filing issue

Such as forms 1040, 1040A, 1040EZ, or 1040SR

☐ Federal income tax return(s) from other years

Such as forms 1040, 1040A, 1040EZ, or 1040SR from other tax years

☐ 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

This survey is about post-filing issues related to your $\{e://Field/Year\}$ federal income tax return

Actions Taken to Resolve Your Post-Filing Issue

The following questions ask about the actions you may have taken to resolve your post-filing issue.

Which of the following did you do to learn more about your post-filing issue?

Select all that apply

- ☐ Called the IRS to get answers to tax questions
- ☐ Sent tax-related documents to the IRS
- ☐ Sent a letter to the IRS
- ☐ Met with an IRS employee
- ☐ 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

☐ Other

☐ Not applicable, my tax professional handled all my post-filing matters

What did you do to resolve your post-filing issue?

Select all that apply

- ☐ Gave someone power of attorney
- ☐ Filed any federal income tax returns
- ☐ Amended any federal income tax returns
- ☐ Made a claim for a refund
- ☐ Made a payment to the IRS
- ☐ Requested a reduction of tax and/or penalty
- ☐ Provided the IRS with financial information
- ☐ Appealed an IRS decision
- ☐ Other

Working with a Tax Professional

This survey is about post-filing issues related to
your \${e://Field/Year} federal income tax return

Working with a Tax Professional

The following questions ask about working with a paid or volunteer tax professional to resolve your post-filing issue.

Did you work with a tax professional to resolve your post-filing issue?

- ☐ Yes
- ☐ No

Which of the following describes the paid or volunteer tax professional you used to resolve your post-filing issue?

Select all that apply

- ☐ 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 as the one 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 resolve your post-filing issue?

Select all that apply

- ☐ Was unsure of how to proceed
- ☐ Used a tax professional for all tax matters
- ☐ Didn't have time to resolve the issue on my own

- ☐ The issue seemed too complex to resolve on my own
- ☐ Thought a tax professional would get a quicker resolution
- ☐ Thought a tax professional would get a more favorable resolution
- ☐ Tried to resolve the issue on my own, but later decided to seek professional tax help
- ☐ Other

What services did your tax professional provide to resolve your post-filing issue?

Select all that apply

- ☐ Filed an amended return
- ☐ Wrote a response to the IRS notice
- ☐ Explained relevant tax law
- ☐ Called or met with an IRS employee
- ☐ Other

Which of the following best describes your tax professional's fee for helping you to resolve your post-filing issue?

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 Verify Block

This survey is about post-filing issues related to your \${e://Field/Year} federal income tax return

Time Spent Resolving Your Post-Filing Issue

The next questions focus on the time you, your family members, friends, or other unpaid volunteers spent resolving your \${e://Field/Year} federal income tax return post-filing issue.

Please include time spent:

- By you, your family members, friends, or other unpaid volunteers actively working to resolve your post-filing issue

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 resolve your post-filing issue
- Filing any state income tax returns

Please include time spent:

Please do NOT include time spent:

- By a paid tax professional who may have helped you resolve your post-filing issue

How much time did you spend on the following activities to resolve your post-filing issue?

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. Reviewing and gathering tax-related materials

Include time spent on activities such as:

- *Reading notices, 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*

Hours

Minutes

B. Interacting with the IRS

Include time spent on activities such as:

- *Meeting with IRS employees*
- *Visiting a local IRS office (include travel time)*
- *Writing and submitting a letter to the IRS*
- *Searching irs.gov*
- *Completing and submitting tax forms or documentation*
- *Making payments to the IRS*

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$\$ \{e://F$

C. Working with a tax professional

Include time spent on activities such as:

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

$\$ \{e://F$

$\$ \{e://F$

D. Other activities

$\$ \{e://F$

$\$ \{e://F$

You reported spending a total of 0 hours and 0 minutes on activities to resolve your post-filing issue.

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 resolve your post-filing issue?

	Hours	Minutes
A. Reviewing and gathering tax-related materials	{q://C}	{q://C}
B. Interacting with the IRS	{q://C}	{q://C}
C. Working with a tax professional	{q://C}	{q://C}
D. Other activities	{q://C}	{q://C}

You reported {e://Field/QTimeDHours} hours and {e://Field/QTimeDMins} minutes in other activities to resolve your post-filing issue.

Please describe those activities.

You reported {e://Field/QTimeDHours} hours in other activities to resolve your post-filing issue.

Please describe those activities.

You reported \${e://Field/QTimeDMins} minutes in other activities to resolve your post-filing issue.

Please describe those activities.

Costs Associated with Tax Compliance

This survey is about post-filing issues related to your \${e://Field/Year} federal income tax return

Costs Associated with Tax Compliance

The next questions ask about the costs associated with resolving your federal income tax post-filing issue.

Please include costs associated with:

- Money you spent while actively working to resolve your \${e://Field/Year} post-filing issue

Please do NOT include costs associated with:

- Any tax, penalties, and interest related to your post-filing issue
- Filing any federal or state income tax returns not required to resolve your \${e://Field/Year} post-filing issue

How much did you pay for the following products or services to resolve your post-filing issue?

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

Do NOT include costs of tax, penalties, and interest.

A. Paid tax preparation and advice

Include money paid to a tax professional to assist you in resolving your post-filing issue.

\$

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 resolving your post-filing issue
- . Other products and services necessary to correct your post-filing issue

\$

C. IRS processing and user fees

Include money paid for:

- . Payment processing fees (e.g., a credit card convenience fee)
- . User fees (e.g., to set up an installment agreement or offer in compromise)

\$

D. Other

\$

Total

\$

You reported $\$ \{q://QID11/ChoiceNumericEntryValue/4\}$ in other costs to resolve your post-filing issue.

Please describe those costs:

Your Experience

This survey is about post-filing issues related to your \${e://Field/Year} federal income tax return

Your Experience Resolving Your Post-Filing Issue

When resolving your post-filing issue, 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 out what would happen if you didn't respond?

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

Trying to understand IRS notices?

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

Calling the IRS?

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

Responding to the IRS in writing?

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

Finding the tax information you needed to resolve your post-filing issue?

- ☐ Not at all stressful
- ☐ A little stressful
- ☐ Somewhat stressful
- ☐ Very stressful

☐ I did not do this activity

Finding out about payment options?

- ☐ 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

Overall, how stressful was your experience in resolving this post-filing issue?

- ☐ Not at all stressful
- ☐ A little stressful
- ☐ Somewhat stressful
- ☐ Very stressful

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

Select all that apply.

- ☐ 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 was the most difficult part of resolving your post-filing issue?

Please suggest how the IRS could improve taxpayer services or reduce the compliance burden of resolving post-filing issues.

Finish

You have finished the survey.

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

[FAQ](#)
[Preview Survey - English](#)
[Revisar la Encuesta - Español](#)

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

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