INTERNAL REVENUE SERVICE **OMB Control Number: 1545-2256**

INSTRUMENT 01

Individual and Household Digital Service Experience Survey

Service or experience: *[INSERT EXACT IRS DIGITAL SERVICE, PAGE, PROTOTYPE, OR EXPERIENCE]*

Fielding dates: *[MM/DD/YYYY – MM/DD/YYYY]*

Thank you for sharing feedback about your experience with an IRS digital service. The IRS will use your answers to improve its digital products and services. This survey is voluntary and should take about 10 minutes. You may skip any question or stop at any time, and your decision will not affect your taxes or access to IRS services. The survey does not ask for your name. If contact information is needed for recruitment or an incentive, it will be collected separately. Results will be reported only in summary form or without identifying you.

Important: Do not include names; SSNs, TINs, or EINs; passwords or verification codes; contact information; account, card, notice, or case numbers; or other specific tax-account information.

Paperwork Reduction Act Burden Statement. Public reporting burden for this collection of information is estimated to average 10 minutes per response. An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless it displays a valid OMB control number. Send comments regarding this burden estimate or any other aspect of this collection of information to the Internal Revenue Service, Office of Online Services, User Experience Services, ashley.n.webb2@irs.gov. OMB Control Number 1545-2256.

Survey questions

Programming notes appear in gray italics and are not shown to respondents.

Q1. What were you trying to do today? *Select all that apply.*

- ☐ Find general tax information or decide where to start
- ☐ Check a return, refund, amended return, or verification status
- ☐ Make a payment, view a balance, manage a payment plan, or handle estimated taxes
- ☐ Understand or respond to an IRS notice, letter, penalty, debt, case, or unresolved issue
- ☐ View or request a transcript, record, form, or other document
- ☐ Create an account, sign in, verify identity, recover access, or protect an account
- ☐ Update account information, communication preferences, or security settings
- ☐ Find help, an appointment, a location, or the right service channel
- ☐ Another federal tax task
- ☐ I was browsing without a specific task
- ☐ Not sure

Q2. Were you able to complete what you came to do?

- ☐ Yes, completely
- ☐ Partly
- ☐ No
- ☐ The task is still in progress
- ☐ Not applicable

Q3. Overall, how would you rate your experience with this IRS digital service?

- ☐ Excellent
- ☐ Very good
- ☐ Good
- ☐ Fair
- ☐ Poor

Q4. How easy or difficult was it to complete your task?

- ☐ Very easy
- ☐ Easy
- ☐ Neither easy nor difficult
- ☐ Difficult
- ☐ Very difficult
- ☐ Not applicable

Q5. How clear were the information and instructions you received?

- ☐ Very clear
- ☐ Clear
- ☐ Neither clear nor unclear
- ☐ Unclear
- ☐ Very unclear
- ☐ Not applicable

Q6. How easy or difficult was it to find the page, information, or action you needed?

- ☐ Very easy
- ☐ Easy

☐ Neither easy nor difficult
☐ Difficult
☐ Very difficult
☐ I did not need to find anything
☐ Not applicable

Q7. How confident are you that you understood the information or completed the task correctly?

☐ Very confident
☐ Somewhat confident
☐ Neither confident nor unconfident
☐ Not very confident
☐ Not at all confident
☐ Not applicable

Q8. What, if anything, made the task difficult? *Select all that apply.*

☐ I could not find the page, information, or action I needed
☐ Links, labels, or navigation choices were difficult to understand
☐ Content or instructions were unclear
☐ A link, page, or tool did not work or displayed an error
☐ There were too many steps or choices
☐ Sign-in, identity verification, or account access was difficult
☐ Information appeared incomplete, inconsistent, or out of date
☐ An accessibility or assistive-technology barrier affected the task
☐ The service did not support what I needed to do
☐ Another reason
☐ None of these

Show Q8 only when Q2 is “Partly,” “No,” or “The task is still in progress.” Treat “None of these” as exclusive.

Q9. What do you expect to do next?

☐ No further action
☐ Return to this service later
☐ Use another IRS website, account, app, or tool
☐ Call the IRS
☐ Visit or schedule an in-person appointment
☐ Ask a tax professional, volunteer, family member, or another person for help
☐ Use mail or fax
☐ Another action
☐ Not sure

Q10. Would you use this IRS digital service again for a similar task?

☐ Yes
☐ Maybe
☐ No
☐ Not applicable

Before you answer: Do not include names, identifiers, or specific tax-account details.

Q11. What is the one most important change the IRS could make to improve this digital experience? Please identify the page, step, label, information, or feature and explain why it should change.

Open-text response (up to 1,000 characters)