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

INSTRUMENT 02

Business and Tax Professional 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, business name, or firm 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. Which option best describes the capacity in which you used this IRS digital service?

- ☐ Business owner, sole proprietor, partner, shareholder, or member
- ☐ Officer or other person responsible for a business or organization
- ☐ Employee involved in finance, accounting, payroll, or tax work
- ☐ Employee or designated user with assigned online-account access
- ☐ Certified Public Accountant, Enrolled Agent, attorney, or other credentialed tax professional
- ☐ Return preparer or professional with limited representation authority
- ☐ Firm owner, partner, manager, or administrator
- ☐ Firm staff member, delegate, or support employee
- ☐ VITA/TCE or other community tax-assistance volunteer
- ☐ Another business or tax-professional role
- ☐ Prefer not to answer

Q2. What were you trying to do? *Select all that apply.*

- ☐ View a business balance, payment history, payment plan, or estimated-tax information
- ☐ Make or manage a business payment or payment plan
- ☐ Prepare, file, or track a business tax form or return
- ☐ View, understand, or respond to a notice, correspondence, examination, or unresolved issue
- ☐ View or request transcripts, records, compliance reports, or certificates
- ☐ Update business or organization information
- ☐ Manage account access, roles, approvals, or assigned users
- ☐ Authorize a third party or tax professional
- ☐ Submit, manage, or track a Power of Attorney (POA) or Tax Information Authorization (TIA)
- ☐ Access client information, transcripts, or records for authorized work
- ☐ Use public IRS forms, guidance, or professional service entry points
- ☐ Another business or tax-professional task
- ☐ Not sure

Q3. Were you able to complete what you came to do?

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

Q4. Overall, how would you rate your experience with this IRS digital service?

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

Q5. How easy or difficult was it to complete the task?

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

Q6. Please rate each statement about the information or service you received.

Item	Strongly agree	Agree	Neutral	Disagree	Strongly disagree	N/A
The information or instructions were clear.	○	○	○	○	○	○
The information appeared current.	○	○	○	○	○	○
The information or service was relevant to the task.	○	○	○	○	○	○

Q7. 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

Q8. 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

Q9. 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
- ☐ My authority, role, delegation, or assigned access was unclear or did not work as expected
- ☐ Working across more than one business, entity, client, or IRS account was difficult
- ☐ The status, confirmation, or next step was unclear
- ☐ Another reason
- ☐ None of these

Show Q9 only when Q3 is “Partly,” “No,” or “The task is still in progress.” Treat “None of these” as exclusive.

Q10. Did you use another channel because of this task? *Select all that apply.*

- ☐ Called the IRS
- ☐ Visited or scheduled an in-person appointment
- ☐ Used mail or fax
- ☐ Asked a colleague, tax professional, software provider, volunteer, or another person
- ☐ Used another website or digital service
- ☐ No
- ☐ Not sure

Q11. 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, client information, or specific tax-account details.

Q12. What is the one most important change the IRS could make to improve this digital experience? Please identify the page, step, label, information, permission, or feature and explain why it should change.

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