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

INSTRUMENT 05

# Individual and Household Extended Feature and Cross-Service Feedback 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 possible improvements to IRS digital services. This survey is voluntary and should take about 15 minutes. You may skip any question or stop at any time, and your decision will not affect your taxes or access to IRS services. Some capabilities may already exist in a limited form, and some may never be built. The descriptions are for feedback only and are not a commitment by the IRS. The survey does not ask for your name. Contact information needed for recruitment or an incentive will be collected separately, and 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 15 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.

## Context questions

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

**Q1. Which federal tax tasks may be relevant to you during the next 12 months?** *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

**Q2. Which IRS digital services have you used during the past 12 months?** *Select all that apply.*

- ☐ IRS.gov public pages
- ☐ Individual Online Account
- ☐ IRS2Go
- ☐ Where’s My Refund
- ☐ Where’s My Amended Return
- ☐ Direct Pay or another payment tool
- ☐ Online Payment Agreement
- ☐ Get Transcript or another record service
- ☐ Document Upload Tool
- ☐ IRS Free File or Free File Fillable Forms
- ☐ Another IRS digital service
- ☐ None of these
- ☐ Not sure

**Q3. How often did you need to use more than one IRS digital service or account type for the same or closely related federal tax task?**

- ☐ Never
- ☐ Once
- ☐ Two or three times
- ☐ Four to six times
- ☐ Seven or more times
- ☐ Not sure

## Capability descriptions

Show the ten descriptions in the table below and randomize their order for each respondent.

| Code | Capability | Description shown to respondents |
|---|---|---|
| F01 | **Personalized digital home** | A single IRS home showing relevant tax tasks, current statuses, and recommended next steps. |
| F02 | **Return and refund status** | More detailed return, refund, amended-return, and verification status, including what changed and what to do next. |
| F03 | **Payments and balances** | Balances, pending and posted payments, payment history, payment-plan information, and due dates in one place. |
| F04 | **Digital notices and messages** | Notices and messages online with plain-language explanations, deadlines, and response options. |
| F05 | **Secure document upload** | Upload requested documents securely and receive a confirmation and status. |
| F06 | **Transcripts and records** | Find and download transcripts, records, and tax documents more easily. |
| F07 | **Account security** | Security alerts, identity-protection tools, account-recovery help, and clear IP PIN information. |
| F08 | **Guided help** | Guided help that recommends the correct online, phone, or in-person support for the task. |
| F09 | **Optional alerts and reminders** | Optional reminders and alerts for status changes, notices, payments, and deadlines. |
| F10 | **Cross-service continuity** | Move more easily among relevant IRS services and account contexts without losing task progress. |

**Q4. How useful would each possible addition or improvement be for the federal tax tasks you may handle during the next 12 months?**

| Item | Very useful | Somewhat useful | Not very useful | Not at all useful | Not applicable | Not sure |
|---|---|---|---|---|---|---|
| Personalized digital home | ○ | ○ | ○ | ○ | ○ | ○ |
| Return and refund status | ○ | ○ | ○ | ○ | ○ | ○ |
| Payments and balances | ○ | ○ | ○ | ○ | ○ | ○ |
| Digital notices and messages | ○ | ○ | ○ | ○ | ○ | ○ |
| Secure document upload | ○ | ○ | ○ | ○ | ○ | ○ |
| Transcripts and records | ○ | ○ | ○ | ○ | ○ | ○ |
| Account security | ○ | ○ | ○ | ○ | ○ | ○ |
| Guided help | ○ | ○ | ○ | ○ | ○ | ○ |
| Optional alerts and reminders | ○ | ○ | ○ | ○ | ○ | ○ |
| Cross-service continuity | ○ | ○ | ○ | ○ | ○ | ○ |

Q5. Which capabilities would be most useful to you? Select up to three.

- ☐ Personalized digital home
- ☐ Return and refund status
- ☐ Payments and balances
- ☐ Digital notices and messages
- ☐ Secure document upload
- ☐ Transcripts and records
- ☐ Account security
- ☐ Guided help
- ☐ Optional alerts and reminders
- ☐ Cross-service continuity
- ☐ None of these
- ☐ Not sure

*Randomize the ten capability options. Treat “None of these” and “Not sure” as exclusive.*

**Q6. Please rank the selected capabilities.**

☐ First choice: [carry forward selected capability]
☐ Second choice: [carry forward selected capability]
☐ Third choice: [carry forward selected capability]

Show only the selected capabilities. Use sequential single-select questions rather than drag-and-drop.

**Q7. What federal tax task would your first choice help you complete?**

☐ Return or refund status
☐ Balance, payment, payment plan, or estimated tax
☐ Notice, letter, penalty, debt, case, or unresolved issue
☐ Transcript, record, form, or document
☐ Account access, identity verification, recovery, or security
☐ Profile, communication preference, or notification
☐ Finding help or the right service channel
☐ Another task
☐ Not sure

**Q8. Where would you look first for your first-choice capability?**

☐ IRS.gov public pages
☐ Individual Online Account
☐ IRS2Go
☐ A status tracker such as Where's My Refund
☐ A payment or records tool
☐ A link from an IRS notice, letter, email, or text
☐ Another location
☐ Not sure

**Q9. What concerns, if any, would you have about your first-choice capability?** *Select all that apply.*

☐ Privacy or security
☐ Information may be incomplete, delayed, or out of date
☐ The capability may be hard to understand or use
☐ Too many alerts, messages, or steps
☐ The information may differ across IRS services
☐ It may be difficult to reach a person when help is needed
☐ Another concern
☐ No concerns
☐ Not sure

**Q10. Which safeguards or explanations would be most important?** *Select all that apply.*

☐ A clear date showing when information was last updated
☐ A confirmation number, receipt, or status history
☐ Clear permissions and control over settings or notifications
☐ Plain-language explanations and definitions
☐ A clear path to online, phone, or in-person help
☐ A status timeline showing what happened and what comes next
☐ An explanation of what data is shown and who can see it
☐ Another safeguard
☐ None
☐ Not sure

Q11. Please indicate how much you agree or disagree with each statement.

| Item | Strongly agree | Agree | Neutral | Disagree | Strongly disagree | N/A |
|---|---|---|---|---|---|---|
| It was easy to compare the capabilities. | ○ | ○ | ○ | ○ | ○ | ○ |
| I am confident that my choices reflect what would be useful to me. | ○ | ○ | ○ | ○ | ○ | ○ |

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

Q12. What is the one most important change the IRS should make to a capability or step, and why would that change matter for the task you selected?

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