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

INSTRUMENT 06

Business and Tax Professional Extended Feature and Multi-Entity 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 for business or professional work. 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. Any access would still be governed by current law and IRS authorization rules. The descriptions are for feedback only and are not a commitment by the IRS. The survey does not ask for your name, business name, firm name, or client names. 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 option best describes your primary role for this survey?

- ☐ 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. Which workflows may be relevant to your work during the next 12 months? *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

Q3. For about how many businesses, entities, clients, or taxpayer accounts do you personally handle federal tax or online-account work?

- ☐ One
- ☐ Two or three
- ☐ Four to ten
- ☐ Eleven to forty-nine
- ☐ Fifty to one hundred ninety-nine
- ☐ Two hundred or more
- ☐ Not sure
- ☐ Prefer not to answer

Q4. Which IRS online accounts have you signed in to during the past 12 months? *Select all that apply.*

- ☐ Individual Online Account
- ☐ Business Tax Account

☐ Tax Pro Account
☐ I have not signed in to an IRS online account during the past 12 months
☐ Not sure

Q5. How often did you need to move among more than one business, entity, client, IRS account, or IRS service for the same or closely related 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
P01	**Authorized-work dashboard**	A single workspace showing permitted business, client, or entity tasks, statuses, and next steps.
P02	**Balances and payments across entities**	View permitted balances, pending and posted payments, payment history, plans, and due dates across authorized entities.
P03	**Digital notices and correspondence**	View, understand, route, and respond to permitted notices or correspondence with status tracking.
P04	**Secure document exchange**	Upload requested documents securely and receive confirmation and status for business or client work.
P05	**Transcripts and records**	Request and access permitted transcripts, records, compliance reports, or certificates more easily.
P06	**Access and role management**	Add, remove, approve, renew, or review account roles and assigned access with clear status and expiration information.
P07	**Authorization management**	Submit and track Power of Attorney, Tax Information Authorization, and related authorization requests.
P08	**Multi-entity or client work queue**	Use filters, saved views, and status summaries to manage a permitted portfolio of entities, clients, or cases.
P09	**Optional alerts and reminders**	Receive optional alerts about deadlines, status changes, authorizations, notices, or payments.
P10	**Guided help and escalation**	Receive role-aware guidance and a clear path to the correct online, phone, or other support channel.

Q6. How useful would each possible addition or improvement be for the business or tax-professional work you may handle during the next 12 months?

Item	Very useful	Somewhat useful	Not very useful	Not at all useful	Not applicable	Not sure
Authorized-work dashboard	○	○	○	○	○	○
Balances and payments across entities	○	○	○	○	○	○
Digital notices and correspondence	○	○	○	○	○	○
Secure document exchange	○	○	○	○	○	○
Transcripts and records	○	○	○	○	○	○
Access and role management	○	○	○	○	○	○
Authorization management	○	○	○	○	○	○
Multi-entity or client work queue	○	○	○	○	○	○
Optional alerts and reminders	○	○	○	○	○	○

Item	Very useful	Somewhat useful	Not very useful	Not at all useful	Not applicable	Not sure
Guided help and escalation	○	○	○	○	○	○

Q7. Which capabilities would be most useful to you? Select up to three.

- ☐ Authorized-work dashboard
- ☐ Balances and payments across entities
- ☐ Digital notices and correspondence
- ☐ Secure document exchange
- ☐ Transcripts and records
- ☐ Access and role management
- ☐ Authorization management
- ☐ Multi-entity or client work queue
- ☐ Optional alerts and reminders
- ☐ Guided help and escalation
- ☐ None of these
- ☐ Not sure

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

Q8. 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.

Q9. What type of task would your first choice help you complete?

- ☐ Business balance, payment, payment plan, or estimated tax
- ☐ Business form, return, notice, record, or unresolved issue
- ☐ Business-account access, role, approval, or assigned user
- ☐ POA, TIA, representation, or client information access
- ☐ Work across several businesses, entities, clients, or accounts
- ☐ Public IRS forms, guidance, or professional service entry point
- ☐ Another task
- ☐ Not sure

Q10. Where would you look first for your first-choice capability?

- ☐ IRS.gov public business or tax-professional pages
- ☐ Business Tax Account
- ☐ Tax Pro Account
- ☐ Individual Online Account
- ☐ A separate IRS business or professional tool
- ☐ A link from an IRS notice, letter, email, or message
- ☐ Another location
- ☐ Not sure

Q11. What concerns, if any, would you have about your first-choice capability? *Select all that apply.*

- ☐ Privacy, security, or client confidentiality
- ☐ Authority, permissions, or delegated access may be unclear
- ☐ Information may be incomplete, delayed, or out of date
- ☐ The capability may be hard to understand or use
- ☐ Working across entities or clients may create errors
- ☐ Too many alerts, messages, or steps
- ☐ It may be difficult to reach a person when help is needed
- ☐ Another concern
- ☐ No concerns
- ☐ Not sure

Q12. Which safeguards or explanations would be most important? *Select all that apply.*

- ☐ Clear role, authority, and permission labels
- ☐ A clear date showing when information was last updated
- ☐ Confirmation numbers, receipts, or status histories
- ☐ Approval, review, and revocation controls
- ☐ Plain-language explanations and definitions
- ☐ A clear path to the correct help channel
- ☐ Activity history showing important actions or changes
- ☐ An explanation of what data is shown and who can see it
- ☐ Another safeguard
- ☐ None
- ☐ Not sure

Q13. 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 in my work.	○	○	○	○	○	○

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

Q14. What is the one most important change the IRS should make to a capability, permission, or workflow step, and why would that change matter for your work?

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