Direct File CX Survey - Completio

Users can elect to take the survey after submitting their retur

Question#	TY24 CX Survey Question/Text
OMB information	OMB Control No. 1545-2290 (expires 12/31/2026). Estimated time to complete: 10 minutes. Your participation is voluntary.
Intro text	Thank you for providing feedback on your experience with Direct File. All questions are optional.

Section 1 of 3: Your experience this year	
1	Please rate your overall experience using Direct File
2	Please rate how strongly you agree or disagree with the statement: My experience with Direct File increased my trust in the IRS
2.1	What could have been better? (Select all that apply)

2.1.a	What other way(s) could Direct File have been better? Please do NOT provide any personal information (name, Social Security number, etc.) in your response.
2.2	What about this interaction made the difference? (Select all that apply)
2.2.a	What other way(s) did your interaction with Direct File increase your trust in the IRS? Please do NOT provide any personal information (name, Social Security number, etc.) in your response.
3	How did you hear about Direct File? (Select all that apply)
3.1	What other way(s) did you hear about Direct File? Please do NOT provide any personal information (name, Social Security number, etc.) in your response.
4	Why did you choose to use Direct File to file your federal taxes this year? (Select all that apply)

4.1	What other reason(s) did you have for choosing to file with Direct File this year? Please do NOT provide any personal information (name, Social Security number, etc.) in your response.
5	Did you need help with anything while using Direct File? (Select all that apply)

5.1	Please provide more details about issues you had trying to get help. Please do NOT provide any personal information (name, Social Security number, etc.) in your response.
6	Was there anything you particularly liked about using Direct File? Please do NOT provide any personal information (name, Social Security number, etc.) in your response.
7	How could we improve Direct File? Please do NOT provide any personal information (name, Social Security number, etc.) in your response.
8	On a scale from 0 to 10 with 0 being extremely unlikely and 10 being extremely likely, how likely are you to recommend Direct File to a friend or family member?

Section 2 of 3: Your filing experience last year	
9	How did you prepare your federal income tax return last year in 2024?
9.1	How did you prepare your federal income tax return last year in 2024? Please do NOT provide any personal information (name, Social Security number, etc.) in your response.
10	How did using Direct File this year compare to your filing experience last year?
Section 3 of 3: Demographics	
11	What is the highest degree or level of school you have completed?
12	What is your annual income?
13	What is your zip code?

14	Can we contact you to find out more about your experience with Direct File to inform future improvements? If so, please share your contact information to be considered for an interview at a convenient time for you. No personally identifying information will be connected with the feedback you share in an interview. Email address
15	Phone number
PRA and Privacy Act Statement as footnote	Paperwork Reduction Act (PRA) and Privacy Act Statement: The authority to request this information is 5 United States Code 301. The primary purpose of asking for the information is to determine steps the IRS can take to improve our services to you. The information may be disclosed as authorized by the routine uses published in the following Privacy Act System of Records: (1) IRS 00.001 Correspondence Files and Correspondence Control Files and (2) IRS 10.004 Stakeholder Relationship Management and Subject Files. Providing the information is voluntary. Not answering some or all of the questions will not affect you. If you have any comments regarding the time estimates associated with completing this survey or suggestions on making this process simpler, please write to the Internal Revenue Service, Special Services, SE:W:CAR:MP:T:M:SP, 1111 Constitution Ave. NW, Room 6129, Washington, DC 20224.
Post submission text	Thank you for completing the Direct File Taxpayer Experience Survey! Your feedback is valuable to us and will allow the IRS to continue to improve Direct File.

n

·n with Direct File

Answer Type	Answer Choices

Radio button	Excellent
	Above average
	Average
	Below average
	Very poor
Radio button	1 = Strongly disagree
	2 = Disagree
	3 = Neutral
	4 = Agree
	5 = Strongly agree
Checkboxes	Direct File did not meet my needs
	It was difficult to use
	It took too long to do what I needed to do
	Instructions were unclear
	Customer service employees I interacted with were not helpful
	Other

Text	
Checkboxes	
	It was easy to use
	It took a reasonable amount of time to do what I needed to do
	Instructions were clear
	Customer service employees I interacted with were helpful
	Other
Text	
Checkboxes	Friend or family
	Web search, e.g., Google
	Social media
	News articles or programs
	IRS.gov
	Program that gives free help filing taxes e.g., Volunteer Income Tax Assistance (VITA), library free tax filing program, Tax Counseling for the Elderly (TCE)
	Other
Text	
Checkboxes	I had a positive experience with Direct File last year

	Direct File is free to use
	I believe my filing will be accurate with Direct File
	Direct File seemed easy to use
	I wanted to file directly with the IRS
	I believe the IRS will keep my tax data secure and private
	Other
Text	
Checkboxes	No, I didn't need help
	Yes, I chatted with Direct File customer support
	Yes, but I couldn't find a way to get help in Direct File
	Yes, and I found help outside of Direct File
	Yes, I needed help but didn't look for help
Text	
Text	
Text	
Radio button	0 = Extremely unlikely
	1
	2
	3
	4
	5
	6
	7

	8
	9
	10 = Extremely likely
Radio button	I did not file last year
	I prepared my return on paper
	I used software or an online tool that I paid for
	I used Direct File
	I used free software or a free online tool that was not Direct File
	I used a paid preparer
	Other
Text	
	Much easier
	Easier
	About the same
	Harder
	A lot harder
Radio button	Less than high school diploma
	High school diploma or GED
	Associate's degree
	Bachelor's degree
	Trade school
	Master's degree
	Doctorate
Radio button	Under $25,000
	$25,000 - 50,000
	$50,001-75,000
	$75,001 - 100,000
	Over $100,000
Text	

Text (validate for email address)	
Text (validate for phone number format)	

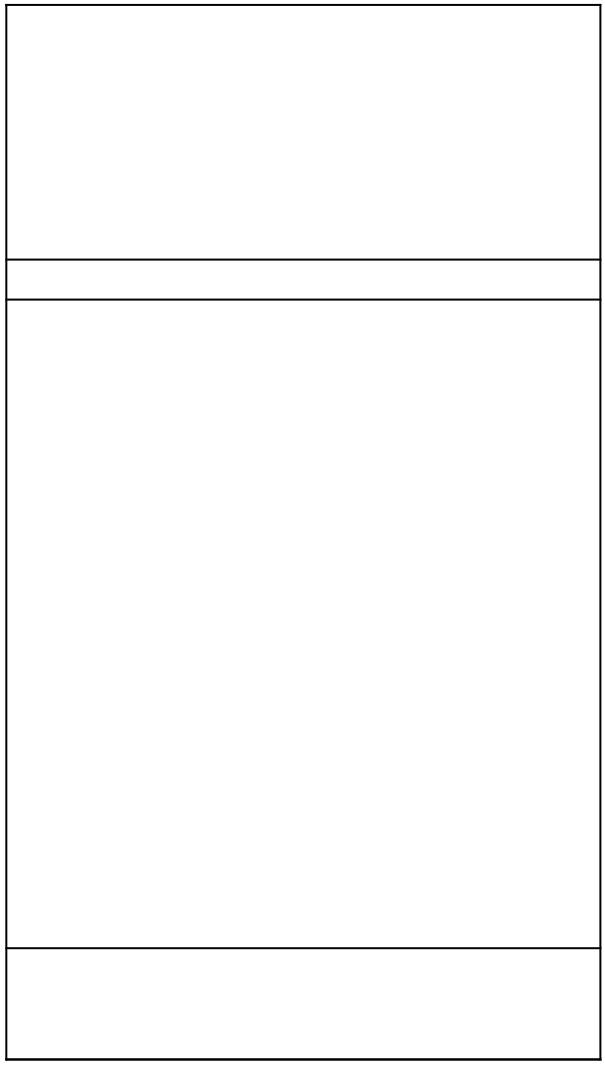
Condition	

Q2=1-4

Q2.1=Other
Q2=5
Q2.2=Other
Q3=Other

Q4=Other
Q5=Yes, but I couldn’t find a way to get help in Direct Fil

Q9=Other



Direct File CX Survey - Non-Comp

Users can elect to take the survey after receiving an emailed i

Question#	TY24 CX Survey Question/Text
OMB information	OMB Control No. 1545-2290 (expires 12/31/2026). Estimated time to complete: 10 minutes. Your participation is voluntary.
Intro text	Thank you for providing feedback on your experience with Direct File. All questions are optional.
Section 1 of 3: Your experience this year	
1	Please rate your overall experience using Direct File
2	Please rate how strongly you agree or disagree with the statement: My experience with Direct File increased my trust in the IRS
2.1	What could have been better? (Select all that apply)

2.1.a	What other way(s) could Direct File have been better? Please do NOT provide any personal information (name, Social Security number, etc.) in your response.
2.2	What about this interaction made the difference? (Select all that apply)
2.2.a	What other way(s) did your interaction with Direct File increase your trust in the IRS? Please do NOT provide any personal information (name, Social Security number, etc.) in your response.
3	How did you hear about Direct File? (Select all that apply)
3.1	What other way(s) did you hear about Direct File? Please do NOT provide any personal information (name, Social Security number, etc.) in your response.
4	Why did you decide to try Direct File this year? (Select all that apply)

4.1	What other reason(s) did you have for trying Direct File this year? Please do NOT provide any personal information (name, Social Security number, etc.) in your response.
5	Did you need help with anything while using Direct File? (Select all that apply)

5.1	Please provide more details about issues you had trying to get help. Please do NOT provide any personal information (name, Social Security number, etc.) in your response.
6	Was there anything you particularly liked about using Direct File? Please do NOT provide any personal information (name, Social Security number, etc.) in your response.
7	How could we improve Direct File? Please do NOT provide any personal information (name, Social Security number, etc.) in your response.
8	On a scale from 0 to 10 with 0 being extremely unlikely and 10 being extremely likely, how likely are you to recommend Direct File to a friend or family member?

Section 2 of 3: Your filing experience last year	
9	How did you prepare your federal income tax return last year in 2024?
9.1	How did you prepare your federal income tax return last year in 2024? Please do NOT provide any personal information (name, Social Security number, etc.) in your response.
10	How did using Direct File this year compare to your filing experience last year?
Section 3 of 3: Demographics	
11	What is the highest degree or level of school you have completed?
12	What is your annual income?

13	What is your zip code?
14	Can we contact you to find out more about your experience with Direct File to inform future improvements? If so, please share your contact information to be considered for an interview at a convenient time for you. No personally identifying information will be connected with the feedback you share in an interview. Email address
15	Phone number
PRA and Privacy Act Statement as footnote	Paperwork Reduction Act (PRA) and Privacy Act Statement: The authority to request this information is 5 United States Code 301. The primary purpose of asking for the information is to determine steps the IRS can take to improve our services to you. The information may be disclosed as authorized by the routine uses published in the following Privacy Act System of Records: (1) IRS 00.001 Correspondence Files and Correspondence Control Files and (2) IRS 10.004 Stakeholder Relationship Management and Subject Files. Providing the information is voluntary. Not answering some or all of the questions will not affect you. If you have any comments regarding the time estimates associated with completing this survey or suggestions on making this process simpler, please write to the Internal Revenue Service, Special Services, SE:W:CAR:MP:T:M:SP, 1111 Constitution Ave. NW, Room 6129, Washington, DC 20224.
Post submission text	Thank you for completing the Direct File Taxpayer Experience Survey! Your feedback is valuable to us and will allow the IRS to continue to improve Direct File.

letion

invite after filing season ends

Answer Type	Answer Choices
Radio button	Excellent
	Above average
	Average
	Below average
	Very poor
Radio button	1 = Strongly disagree
	2 = Disagree
	3 = Neutral
	4 = Agree
	5 = Strongly agree
Checkboxes	Direct File did not meet my needs
	It was difficult to use
	It took too long to do what I needed to do
	Instructions were unclear
	Customer service employees I interacted with were not helpful
	Other

Text	
Checkboxes	
	It was easy to use
	It took a reasonable amount of time to do what I needed to do
	Instructions were clear
	Customer service employees I interacted with were helpful
	Other
Text	
Checkboxes	Friend or family
	Web search, e.g., Google
	Social media
	News articles or programs
	IRS.gov
	Program that gives free help filing taxes e.g., Volunteer Income Tax Assistance (VITA), library free tax filing program, Tax Counseling for the Elderly (TCE)
	Other
Text	
Checkboxes	I had a positive experience with Direct File last year

	Direct File is free to use
	I believe my filing will be accurate with Direct File
	Direct File seemed easy to use
	I wanted to file directly with the IRS
	I believe the IRS will keep my tax data secure and private
	Other
Text	
Checkboxes	No, I didn't need help
	Yes, I chatted with Direct File customer support
	Yes, but I couldn't find a way to get help in Direct File
	Yes, and I found help outside of Direct File
	Yes, I needed help but didn't look for help
Text	
Text	
Text	
Radio button	0 = Extremely unlikely
	1
	2
	3
	4
	5

	6
	7
	8
	9
	10 = Extremely likely
Radio button	I did not file last year
	I prepared my return on paper
	I used software or an online tool that I paid for
	I used Direct File
	I used free software or a free online tool that was not Direct File
	I used a paid preparer
	Other
Text	
	Much easier
	Easier
	About the same
	Harder
	A lot harder
Radio button	Less than high school diploma
	High school diploma or GED
	Associate's degree
	Bachelor's degree
	Trade school
	Master's degree
	Doctorate
Radio button	Under $25,000
	$25,000 - 50,000
	$50,001-75,000
	$75,001 - 100,000
	Over $100,000

Text	
Text (validate for email address)	
Text (validate for phone number format)	

Condition	
Q2=1-4	

Q2.1=Other
Q2=5
Q2.2=Other
Q3=Other

Q4=Other
Q5=Yes, but I couldn’t find a way to get help in Direct Fil

