

IRS Chat Survey

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is [###]. This survey will take around 15 minutes to complete. All responses are confidential. If you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to:

Internal Revenue Service
Tax Products Coordinating Committee
SE:W:CAR:MP:T:T:SP
1111 Constitution Ave. NW
Washington, DC 20224

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* 1. How often do you use IRS.gov?

- ☐ Daily
- ☐ Weekly
- ☐ Several times a month
- ☐ A few times a year
- ☒ Yearly
- ☐ I've never been to IRS.gov

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* 2. In the past 12 months, what frustrations, if any, have you experienced with IRS.gov? (Select all that apply)

- ☒ Search doesn't provide the requested information
- ☐ Services (e.g., Online Account) are not accessible on mobile devices
- ☐ Technical problems (e.g. can't log in)
- ☐ Website is hard to navigate
- ☐ Tax forms and publications are hard to locate
- ☐ Website is not mobile friendly
- ☐ I can't get answers to simple questions
- ☐ Search options are not useful
- ☐ Tools I need are down or not operational
- ☐ Other (please specify)

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* 3. If you needed to interact with the IRS, how would you prefer to do so?
Please order the following communication methods where 1 = Most Preferred and 6 = Least Preferred.

- | | | |
|---|---|---------------------------|
| # | 1 | Direct Mail |
| # | 2 | Email or Secure Messaging |
| # | 3 | Live Web Chat |
| # | 4 | Website Information |
| # | 5 | Telephone |
| # | 6 | In Person |

* 4. In the past 12 months, which of the following have you used to find information or get an answer to IRS questions or concerns? (Select all that apply)

- ☐ Telephone
- ☐ Email or Secure Messaging
- ☐ Online Chat
- ☐ Website
- ☐ Direct Mail
- ☐ In Person (e.g. Tax Assistance Centers, Low Income Taxpayer Clinics)
- ☐ I have not needed to find information related to the IRS
- ☐ Other (please specify)

* 5. How likely are you to use Live Chat on IRS.gov if you needed to get answers to general tax questions?

- ☐ Extremely likely
- ☐ Very likely
- ☐ Moderately likely
- ☐ Slightly likely
- ☐ Not at all likely

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* 6. Why are you most likely to use Live Chat on IRS.gov?
(Select up to 3)

- ☐ Locating a tax form, publication or similar tax document
- ☐ Finding a human customer service representative
- ☐ Resolving a tax complaint or problem
- ☐ Getting detailed answers or explanations
- ☐ Paying a tax bill
- ☐ Locating a nearby tax assistance center
- ☐ Other (please specify)

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* 7. If you needed to contact the IRS, how likely would you be to use Live Chat instead of calling the IRS?

- ☐ Extremely likely
- ☐ Very likely
- ☐ Moderately likely
- ☐ Slightly likely
- ☐ Not at all likely

8. In what instances would you not use Live Chat on IRS.gov?

9. How would you expect Live Chat to work on IRS.gov?

10. What would make you trust the IRS Live Chat platform or reassure you that your personal information is secure?

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* 11. If Live Chat were available today on IRS.gov, which of these features would you consider to be the most important? Order the following features where 1 = Most Preferred and 6 = Least Preferred

1	Easy communication with customer representatives
2	Detailed answers
3	24-hour service
4	Tax complaints or issues resolved
5	Getting a response within 5-10 minutes
6	Answers to simple tax questions

* 12. In what capacity would you be most likely to use Live Chat on IRS.gov?

- ☐ An individual taxpayer (myself, my household, my child, my parents, etc.)
- ☐ A business (corporation, partnership, small business, self-employment, etc.)
- ☐ A charity or non-profit organization (tax exempt entity or government entity)
- ☐ A tax professional (accountant, attorney, tax preparer, etc.)

* 13. In the past 12 months, which U.S. government agencies have you spoken to directly through Live Chat? (Select all that apply)

- ☐ USA.gov
- ☐ MyFedLoan.gov
- ☐ Cancer.gov
- ☐ StudentAidHelp.ed.gov
- ☐ IRS.gov
- ☐ None of the above
- ☐ Other (please specify)

14. What concerns do you have about using live chat, not just with the IRS? (Optional)

15. In the past 12 months, which retailers or service providers have you spoken to directly through web chat? (Optional)

16. Please share any additional feedback. (Optional)

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To help us better understand the needs of U.S taxpayers, please provide the following information.

17. Gender (Optional)

- ☐ Male
- ☐ Female
- ☐ Prefer not to answer
- ☐ Other (please specify)

18. Age (Optional)

- ☐ 18 - 24
- ☐ 25 - 34
- ☐ 35 - 44
- ☐ 45 - 54
- ☐ 55 - 64
- ☐ 64 or older
- ☐ Prefer not to answer

19. What is your yearly household income? (Optional)

- ☐ What is your yearly household income?
- ☐ Less than \$20,000
- ☐ \$20,00 to \$34,999
- ☐ \$35,000 to \$49,999
- ☐ \$50,000 to \$74,999
- ☐ \$75,000 to \$99,999
- ☐ \$100,000 to 149,999
- ☐ \$150,000 or more
- ☐ Prefer not to answer

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