

Survey:

Due Diligence Webinar Survey for Attendees

The purpose of this research is to help the IRS improve Due Diligence webinars for tax preparers like you. You were selected to receive this survey because our records show that you were invited to, and attended, a Due Diligence webinar. Your answers will remain private to the extent allowed by law, and your participation is voluntary. You may stop at any time or skip any question you do not wish to answer.

Your opinions are important because you will be representing tax preparers across the United States and your responses will be used to improve the webinars.

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 1545-1432. Also, if you have any comments regarding the time estimates associated with this study 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.

Privacy Act Statement: We are committed to protecting your privacy rights. Our authority for requesting the information is 5 USC 301. The Return Integrity and Compliance Service (RICS) would like to collect feedback from those who do and do not attend the Due Diligence webinar in order to improve the experience for future attendees. Our intention is to keep identities of participants anonymous by aggregating information. Your participation is voluntary. If you do not participate, we will not have the benefit of your input to improve our program. You will have the opportunity to provide written comments, suggestions, or other feedback. We will not share the information you give us outside of IRS employees who need the information, unless required by law. Any information we collect and maintain will be handled in accordance with the access and privacy protection requirements of the Internal Revenue Code, the Privacy Act of 1974, the Freedom of Information Act, and IRS policies and practices. Visit the IRS Electronic Freedom of Information Act Reading Room for more information about these laws. We document much of our internal policy on these laws in IRM 10.5.1, Privacy Policy.

We estimated the time required to complete the survey to be approximately 5 minutes.

1. How long have you been a paid tax return preparer?
 - 0 – 3 years
 - 4 – 10 years
 - More than 10 years
2. What is your age?
 - 18 – 29
 - 30 – 39
 - 40 – 49

50 – 59
60 and older

3. What tax preparing credentials do you have?
 - Authorized e-file provider
 - Certifying Acceptance Agent (CAA) / Acceptance Agent (AA)
 - Certified Public Accountant (CPA)
 - Enrolled agent
 - Tax attorney
 - Unenrolled tax preparer
 - Other – Please specify
4. How many tax returns did you complete last year, 2024 (for tax year 2023)?
 - Less than 100
 - 100 – 499
 - 500 – 1000
 - Over 1000
5. How much of the webinar did you view?
 - None of the webinar
 - Very little of the webinar
 - Less than half of the webinar
 - More than half of the webinar
 - Most of the webinar
 - All of the webinar
6. How did you first learn about the Due Diligence webinar?
 - Employer
 - Letter from the IRS
 - Notice on Online Account
 - Referred by another tax return preparer
 - Social media
 - Other - Please specify
7. Would you recommend the Due Diligence webinar to other tax return preparers?
 - No
 - Yes
8. Was the information provided during the Due Diligence webinar easy to understand?
 - No
 - Yes
9. Will the Due Diligence webinar help you to fulfil your Due Diligence requirements?
 - No
 - Yes

10. How engaging was the Due Diligence webinar?
- Not at all engaging
 - Somewhat engaging
 - Very engaging
11. What did you like about the Due Diligence webinar?
- Select all that apply.*
- Convenience of the online format
 - Ease of joining the webinar
 - Information provided in the webinar
 - The ability to earn continuing education credits
 - The length of the webinar
 - Timing of the webinar
 - Other – Please specify
 - None of the above
12. Are you aware of the [Tax Preparer Toolkit](#)?
- No
 - Yes
13. (If answered Yes to Question 12). Have you ever used the following resources in the [Tax Preparer Toolkit](#)?
- Select all that apply.*
- Common Due Diligence Situations
 - Due Diligence Training Module
 - Due Diligence Videos
 - Form 886-H-EIC, Documents You Need to Send to Claim the Earned Income Tax Credit (EITC) on the Basis of a Qualifying Child or Children
 - Handling the Most Common EITC Errors
 - Nationwide Tax Forum Videos
 - Publication 4687, Paid Preparer Due Diligence
 - None of the above
14. How could the Due Diligence webinar be improved (select all that apply)?
- Allow for more attendee interaction
 - Eliminate technological issues
 - Include more client scenarios
 - Shorten the webinar
 - Offer the webinar at different times of the day
 - Offer the webinar in Spanish
 - Offer the webinar in another language – Please specify
 - Provide more detail on how to complete Form 8867, Paid Preparer's Due Diligence Checklist
 - Provide more detail on the Due Diligence requirements
 - Provide more detail on what to do after receiving a letter from the IRS about Due Diligence
 - Provide more detail about a Due Diligence examination

Other – Please specify
No changes needed

15. How do you plan on changing the procedures in your office after attending the Due Diligence webinar?

Ask more probing questions of clients
Document client responses to questions
Retain copies of client provided documents
Other – Please specify
No changes needed

This concludes the survey. Thank you for your participation!

Recruitment Emails:

Due Diligence Webinar Survey for Attendees Notices

Invitation:

Greetings:

You are being invited to take this survey, because our records show you are a tax preparer who was invited and attended a Due Diligence webinar.

We are asking for your feedback so we can improve the Due Diligence webinar.

Survey Information

- Your participation is voluntary.
- Your identity will remain anonymous.
- Responses will be aggregated into a report.
- The survey should take less than 5 minutes to complete.
- See the Taxpayer Services Privacy Policy¹.

Please click to take the [%\[Due Diligence Attendee Survey\]URL%](#).

Thank you in advance for your participation.

If you have comments or feedback regarding this survey, please contact [*TSSS Research Survey Administrator](#).

Need help?

We are committed to providing everyone a voice. If the survey format interferes with your ability to respond due to a disability, such as assistive technology incompatibility, or if you are experiencing other difficulties accessing your survey or have questions, please contact [*TSSS Research Survey Administrator](#).

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Reminder(s):

Greetings:

For those of you that already completed the Due Diligence Webinar Attendee survey, thank you for taking the time. For those of you that have not, we understand that you have many demands on your time or otherwise may not have had an opportunity to take it, but your input is important to us. The information you provide us is vital in helping us improve the Due Diligence webinar.

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