

2010 e-Services Customer Satisfaction Survey

Prepared For:



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Research Background, Purpose, Method, Scope & Timing

- e-Services is a suite of 6 Web-based services, through which partners can conduct business with the IRS 24/7...
 - Registration for e-Services
 - Online e-file Application
 - Disclosure Authorization (DA)
 - Electronic Account Resolution (EAR)
 - Transcript Delivery System (TDS)
 - Taxpayer Identification Number (TIN) Matching
 - *NOTE: PTIN eliminated from study in 2010.*
 - Each year, the IRS tracks customer satisfaction with e-Services to measure User satisfaction, attitudes, and concerns as well as Non-User interest in use of e-Services and reasons for non-usage.
 - The 2010 survey is the third annual survey conducted with an identically configured sample, so the analysis here focuses on 2010 results (in total and by key User sub-groups), with comparison to the similar samples surveyed in 2008 and 2009.
- The 2010 survey was conducted by telephone 10/11/10—11/04/10 among 1,907 respondents drawn from lists provided by IRS and allocated across four segments of past-year usage:
 - 1) 501 **Heavy Users Of e-Services** – Registered Users who have used 500+ TDS, 100+ EAR, or 250+ DA.
 - 2) 501 **Medium Users** – Registered Users who have used 50 to <500 TDS, 25 to <100 EAR, or 25 to <250 DA.
 - 3) 403 **Light Users** – Registered Users who have used TDS, EAR, or DA at least once but <50 TDS, <25 EAR, or <25 DA.
 - 4) 502 **Eligible Non-Users**. EROs, RAs, or Online Providers who are either Non-Registered or Registered But Inactive, or Newly-Registered, or Registered But With No Record of TDS, EAR, or DA Usage within the past year.

Detailed sample selection criteria is on Appendix Page 27.

NOTE: When the 3 **User** groups are shown in “Total”, they are weighted to real-world, de-duped Total User universe proportions (15% Heavy, 46% Medium, 39% Light).

Detailed Findings

STATISTICAL NOTATION USED IN REPORT

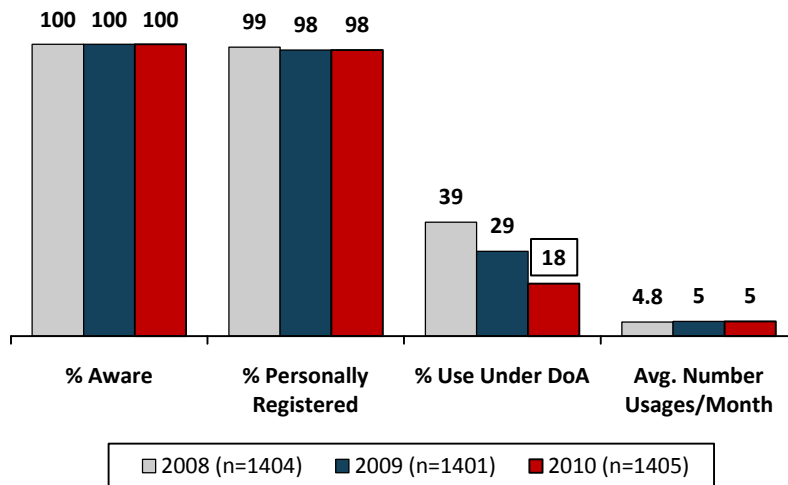
- Circled data are significantly HIGHER than comparative data at a 95% confidence level.
- Boxed data are significantly LOWER than comparative data at a 95% confidence level.

Findings Among Users Of e-Services

Awareness & Usage Of e-Services

- As found in each year's survey, virtually all Users were Aware of and personally Registered for e-Services; and with no significant change from year-to-year in Frequency Of Use (~5 x/month). However, the proportion saying they Use Under Delegation Of Authority (DoA) has declined each year.

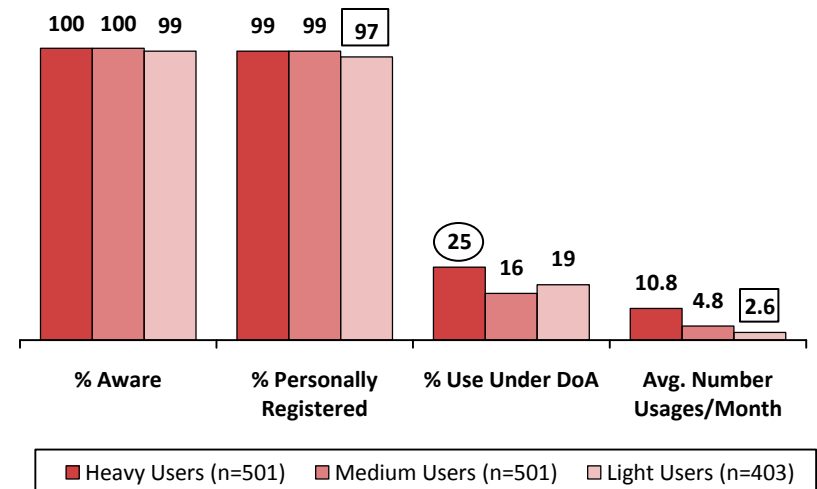
Awareness & Usage: Total Users, '08 To '10



- Q1: Prior to today, were you aware of...e-Services?
- Q2: Are you personally registered as a user of e-Services?
- Q3: ...ever access e-Services as result of being delegated authority by another member of your firm or organization?
- Q4: On average throughout the year, about how often would you say you access and use e-services at the IRS website? (Converted to Times/Month)

- 2010 data from the same measures showed that virtually all in each User segment acknowledged being Aware of and Registered for e-Services, but with differences by segment in Use Under DoA. Naturally, they also differed in Frequency Of Use.

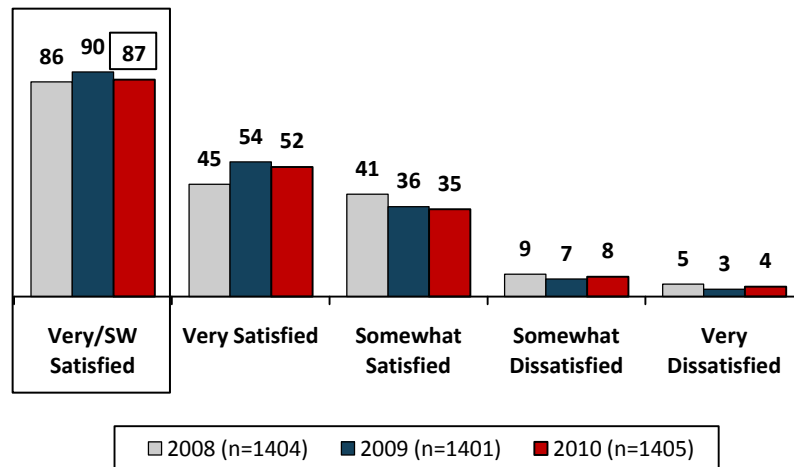
Awareness & Usage: By User Segments In '10



User Satisfaction With e-Services (Overall Program Satisfaction)

- Overall Satisfaction with e-Services (combined “very” plus “somewhat” satisfied ratings) declined by three points in 2010 – making this the first year that we have seen a drop on this key measure.

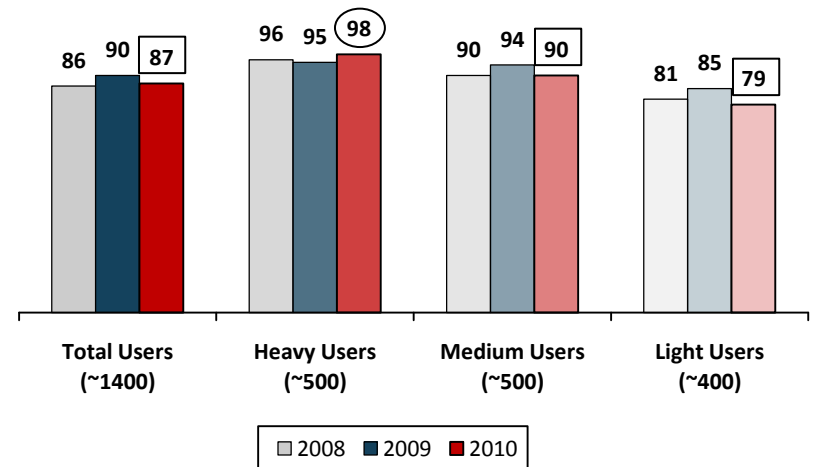
Satisfaction With e-Services: Total Users, '08 To '10



NOTE: 1-2% “Don’t Know” responses not included in chart.

- The decrease in Overall Satisfaction came entirely from Light Users and Medium Users. Satisfaction with the Program among Heavy Users was higher this year than in any past year.

% Very/SW Satisfied: By Total & By User Segments, '08 To '10

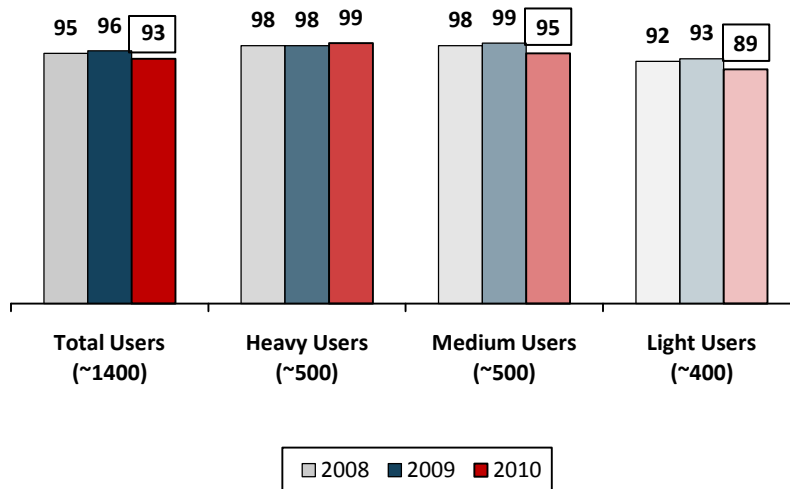


Q5: Thinking about the total e-Services program, including ALL of the specific services that you’re familiar with, how satisfied are you with the e-Services program overall?

Recommendation Intent & Specific Likes Of e-Services Program

- The proportion of Users who said they Would Recommend e-Services to other tax professionals also declined slightly. This decrease also occurred among Medium and Light Users, with Heavy Users stable from year to year.

% Would Recommend e-Services To Others:
By Total Users & By User Segments, '08 To '10



Q6: Would you recommend e-Services to other professionals like yourself?

- The top Specific Likes Of The e-Services Program were *Ease/Convenience, Having Access To Client Info/Files/Data/Transcripts, and Speed Of Access/Service* -- but with notably lower mentions of the Program's *Ease/Convenience* in this year's survey.

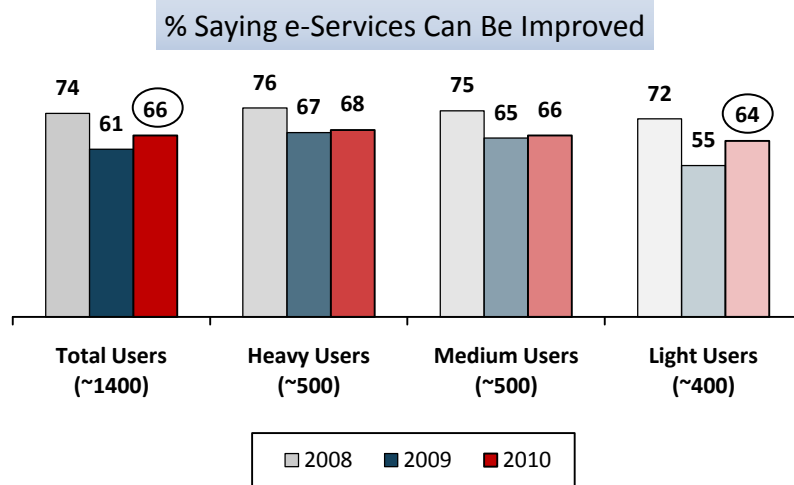
Top Likes: By Total Users '08-'10 & User Segments In '10

	Total 2008 Users (1404) %	Total 2009 Users (1401) %	Total 2010 Users (1405) %	2010 Heavy Users (501) %	2010 Medium Users (501) %	2010 Light Users (403) %
<u>Ease/Convenience (Net)</u>	37	42	32	35	29	34
Accessibility/easy access to info	13	12	4	5	3	6
Not having to make phone calls	7	10	7	9	5	8
It's online/always available	7	8	2	2	1	3
<u>Having Access To Client Info/Files/Data/Transcripts (Net)</u>	35	42	38	41	43	31
<u>Speed Of Access/Service (Net)</u>	37	36	38	38	41	36
Fast access to info/data/transcripts	20	21	19	19	19	18
Fast responses/get answers quickly	4	4	5	5	6	4
<u>Like Specific Services (Net)</u>	28	26	27	29	29	24
Transcript Delivery System	13	10	12	13	14	9
Power Of Attorney/can file a POA	9	9	10	10	11	8

Q7: What if anything do you particularly like about the e-Services program overall?

Can e-Services Be Improved? How?

- In line with the lower Satisfaction ratings this year, there was an increase in the proportion of Users who said e-Services Can Be Improved – especially among Light Users.



- Voluntary Suggestions For Program Improvement centered around improving the user interface and making e-Services easier to use. Suggestions are summarized to the right, with a 2009-2010 breakout of Light Users (the segment showing the most change) – although their suggestions do not tell us very much about their concerns with the Program.

Q8: Can the overall e-Services program be improved in any way?

How e-Services Can Be Improved – Total Users '10 (With Break-Out Of Light Users '09 vs. '10)

	Total '10 Users		Light Users	
	%	(1405)	'09 %	'10 %
<i>Total e-Services Users in 2010</i>				
<u>% With Suggestions For OVERALL PROGRAM</u>	45		41	47
<u>Improve Specific Aspects Of e-Services</u>	23		28	24
Make PoA registration easier and faster	5		8	4
Eliminate the password re-set	7		7	9
Provide better resolution to problems	2		3	2
Provide info on transcripts	3		1	2
<u>Improve The User Interface</u>	19		20	23
Make site user-friendly/easier to nav./fewer screens	10		11	14
Make site less confusing/less cumbersome	5		6	5
Make site more reliable/with less down-time	2		3	1
Make system run faster/less time-consuming	2		4	1
<u>% With Suggestions SPECIFIC TO TDS</u>	9		9	7
Make it faster/less cumbersome/limit # of screens	1		2	0
Improve PoA related to TDS (make easier/less confusing)	1		2	1
Provide more information from prior years	1		0	0
Expand info on transcripts/provide more detail	1		1	0
Allow retrieval/easier access to individual transcripts	1		0	2
<u>% With Suggestions FOR DA</u>	5		6	2
Improve the PoA related to DA	3		4	1
<u>% With Suggestions FOR EAR (More help/online chat)</u>	3		1	3
<u>% With Suggestions FOR POA</u>	2		1	2

Q9: In what specific ways should it be improved?

Satisfaction With Program Dimensions

- With drops in Satisfaction and Recommendation and increases in Can Be Improved in 2010 came generally lower Satisfaction with many Program Dimensions. Specifically, there were lower ratings (especially among Light Users) for *Site Security, Site Appearance, How Long Before Response/Acknowledgment, Ease Of Log-In, How Long It Takes To Find Information, How Long It Takes To Complete An Action, Ease Of Site Navigation, and On-Screen Instructions.*
- Results from probes on several related issues can be found on Appendix Page 23 and these show that:
 - **For Improvement of Tutorials:** while the rating of Tutorials At The Site For Different e-Services improved (see last attribute in table to the right), there was still a clear perceived need for improvement in the Overall Tutorial For The Full Suite Of e-Services (see Page 23).
 - **Probing for Awareness of Other Info/Training** showed that 68% of Users were aware of training via the Nationwide Tax Forums, with about 50% aware of Practitioner Phone Forums/Webinars and Small Business Tax Workshops. However, only about 40% were aware of Tax Practitioner Institute Seminars, Practitioner Liaison Meetings, or Practitioner Video & Audio Presentations.

% Very/Somewhat Satisfied With Program Dimensions:
Total Users, '08 To '10 And By User Segments in '10

	Total 2008 Users (1404) %	Total 2009 Users (1401) %	Total 2010 Users (1405) %	2010 Hvy Users (501) %	2010 Med Users (501) %	2010 Light Users (403) %
Total Users						
Level Of Security Provided By Site	90	94	91	94	94	86
Overall Appearance Of e-Services Site	90	93	90	94	92	85
Having Type Of Info That You Need	88	90	90	95	94	83
How Long For Response/Acknowledgment	85	89	86	94	91	78
Availability Of Specific Services You Need	85	88	88	92	91	82
Ease Of Understanding Of Content At Site	84	89	87	95	91	78
Ease Of Log-In/Identification	82	89	85	92	89	77
How Long Takes To Find Info Looking For	82	88	84	94	88	76
How Long Takes To Complete An Action	81	86	82	87	84	77
Determining Status Of Actions/Queries	80	85	83	92	85	78
Ease Of Navigation Of e-Services Site	78	84	80	89	85	71
On-Screen Instructions At e-Services Site	77	83	80	85	83	74
Ease Of Getting Started w/e-Services	68	77	74	79	77	69
Availability Of Help At e-Svcs. Help Desk	64	59	67	71	72	61
Need To Re-Set Password Every 6 Mos.	45	49	46	57	49	38
Tutorials At Site For Different e-Services	41	30	37	33	36	40

Q10: Tell me how satisfied you are with that aspect of the e-Services program.

Drivers To Satisfaction With e-Services

- While Dimensional ratings show satisfaction with specific aspects of e-Services, they do not tell us which are the Key Drivers – i.e., those attributes with the greatest impact on Overall Satisfaction. To see the Key Drivers, as in 2009, we applied Correlation Analysis to Overall and Attribute satisfaction ratings.
 - Correlation Analysis yields output showing level of correlation as “scores”. The closer the score to “1”, the stronger the correlation.; and the attributes with the highest correlation scores are the “Key Drivers”.
 - To the right are the correlation scores of e-Services Dimensional attributes rank-ordered by 2010 (vs. 2009), along with the very/somewhat satisfied ratings of each one.
 - This analysis shows that, *among the 16 attributes of the e-Services Program that were rated in the study**, **there are now 4 Key Drivers and all are rated lower this year than in 2009**. Each warrants attention and improvement going forward.
- * *Keep in mind that this analysis is limited to inputs, i.e., the 16 attributes covered in the study. There may be other variables or attributes which were not covered in the study, but which could have stronger impact or correlation to Overall Satisfaction than those attributes shown here.*

Key Drivers To Satisfaction With e-Services: Total Users, '09 To '10

	Key Drivers Correlation Scores		% Very/SW Satisfied	
	2009	2010	2009 (%)	2010 (%)
1. How Long Takes To Find Info You're Looking For	.46	.54	88	84
2. How Long It Takes To Complete An Action	.44	.54	86	82
3. Ease Of Navigation Of e-Services Site	.42	.53	84	80
4. Ease Of Understanding Content At Site	.43	.49	89	87
5. Having The Type Of Info That You Need	.43	.47	90	90
6. How Long To Get Response/Acknowledgement	.34	.47	89	86
7. Availability Of Specific Services You Need	.45	.46	88	88
8. Ease Of Log-In/Identification	.35	.46	89	85
9. Determining Status Of Your Actions/Queries	.42	.43	85	83
10. On-Screen Instructions At e-Services Site	.37	.41	83	80
11. Overall Appearance Of e-Services Site	.36	.40	93	90
12. Ease Of Getting Started With e-Services	.31	.38	77	74
13. Level Of Security Provided By e-Services Site	.25	.30	94	91
14. Need To Re-Set Password Every 6 Months	.16	.28	49	46
15. Availability Of Help At e-Services Help Desk	.22	.12	59	67
16. Tutorials At Site For Different e-Services	.27	.07	30	37

Blue highlighting = 2010 Key Drivers of Overall Program Satisfaction.

Red = a substantial increase in correlation from 2009 to 2010.

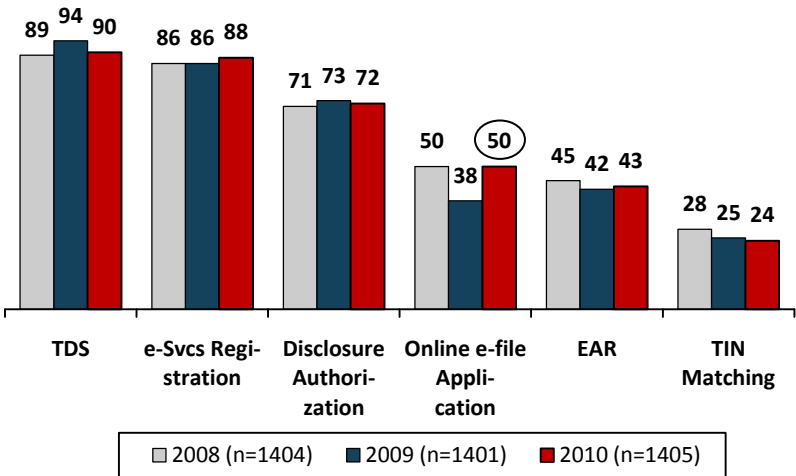
□ = Significantly lower Dimensional rating in 2010.

○ = Significantly higher Dimensional rating in 2010.

Specific e-Services Used & Frequency Of Use Of Each

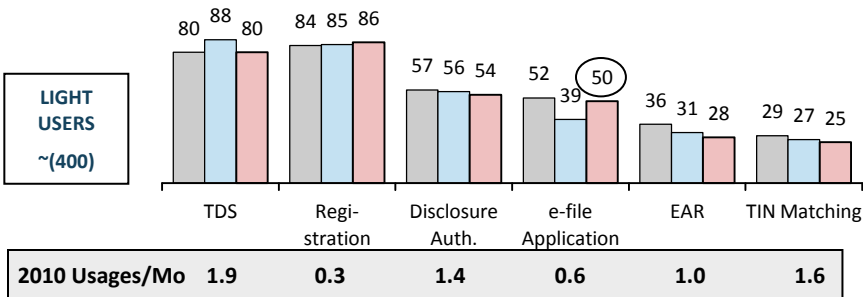
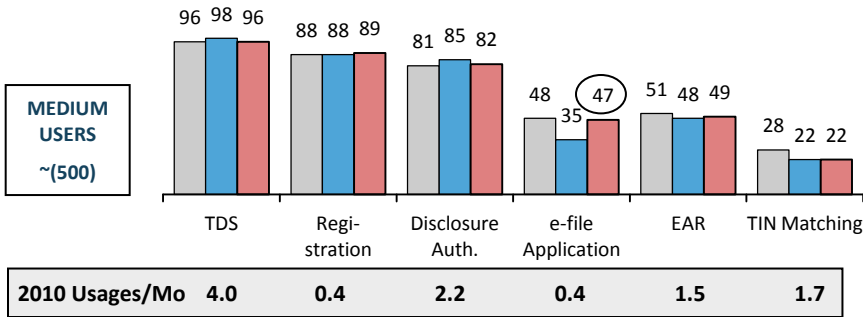
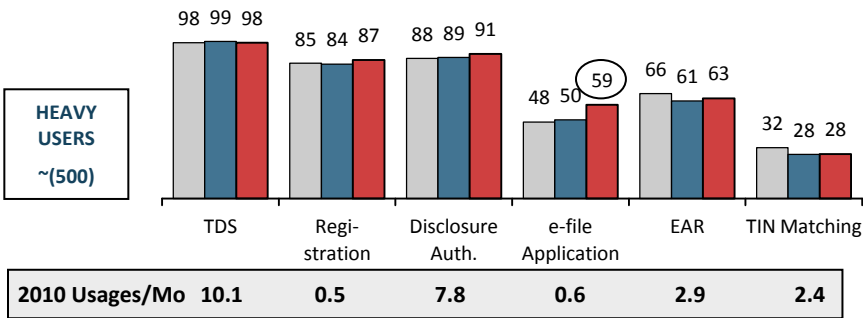
- Next, in terms of Usage Of Specific e-Services, only one service showed a significant change in claimed usage in 2010 (vs. 2009) – Online e-file Application, which returned to the same level found in 2008 (indicating that its 2009 decrease may have been an anomaly).

e-Services Used: Total Users, '08 To '10



- Frequency Of Usage of each service (see scores in shaded boxes for each segment to the right) was again highest, naturally, among the Heavy Users.

Usage & Monthly Frequency Of Use: By Segment: '08 To '10



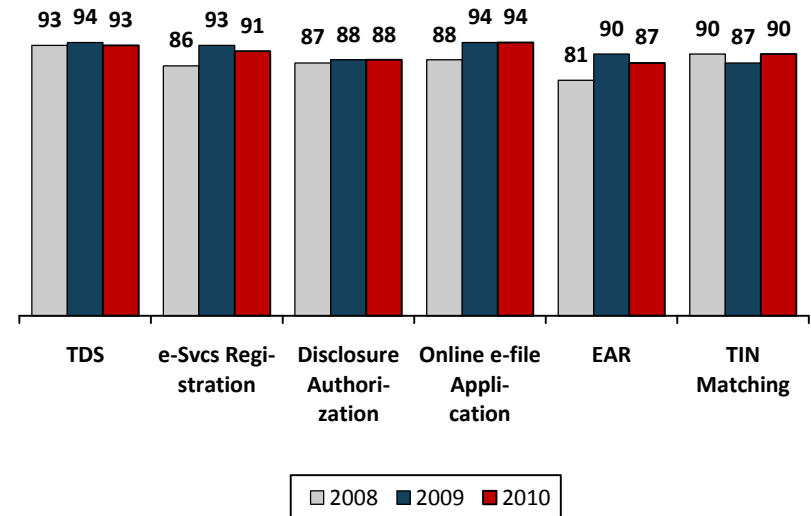
Q12: Which specific e-Services have you ever used?
 Q13: About how often do you use (EACH SERVICE USED)?

Probes On Services & Level Of Satisfaction With Each e-Service

- As shown on Appendix Page 23, probing for Other Services Wanted by Users yielded a wide range of low-level mentions, led by the 3% mentions of...
 - Ability to check on payment history*
 - Ability to get copies of returns/past returns*
 - Ability to access prior-year information*
- As also shown on Appendix Page 23, responses to additional probing on How IRS Can Stimulate Usage Of Disclosure Authorization showed that...
 - The primary issue again, as in 2009, was lack of demand and the suggestion here was for IRS to *create demand*.
 - At a far lower level, again as in '09, came mentions of *need more information about it and make it easier to use*.

- Next, Users were asked to rate their level of Satisfaction With Each e-Service Used. Results showed no significant change in Satisfaction this year (vs. 2009) for any of the six services.

% Of Users Very/Somewhat Satisfied With Each Service: Total Users, '08 To '10



Base Sizes Vary Depending On # Claimed Users Of Each Service

Q14: Based upon your experience in using this service, how satisfied are you with it?

Points Of Possible Improvement In Each Service

- Finally, Users who rated themselves less than “very” satisfied with a service were asked for their Suggestions For Improvement Of Each Service.
- Below and to the right are the top Suggestions for each of the 6 services. Very few meet/exceed 10% mention.

Top Points Of Improvement In Services: 2010

	<u>Total Users</u>
	%
<u>TDS:</u> Base = Users Less Than “Very” Satisfied With Service	(243)
Make it more user-friendly	7
Easier/faster PoA process	6
Make it easier to understand/less confusing/complicated	3
Ability to access information from prior year	3
Clarify error/rejection codes	3
Needs to be faster	3
Make it easier to navigate	3
<u>e-Services Registration:</u> Base = Users Less Than “Very” Satisfied	(277)
Make it less confusing/complicated	9
Have to wait to get PW/PIN#/Letter in mail instead of email	8
Make it more user-friendly	7
Better/clearer on-screen instructions at help site	5
Make registration process easier	3
Make it less cumbersome	3
Make the system run faster	3
Make it easier to navigate	3
Make it easier to understand	3
No need to register again after password expires	3

Top Points Of Improvement In Services: 2010 (Cont’d.)

	<u>Total Users</u>
	%
<u>Disclosure Authorization:</u> Base = Users Less Than “Very” Satisfied	(332)
Make PoA process easier/quicker	10
Make it more user-friendly	8
Make it less cumbersome	7
Make it less time consuming	7
Make it easier to file for people who haven’t filed recently	6
Make it less confusing/complicated	5
Too much information is required	5
<u>e-file Application:</u> Base = Users Less Than “Very” Satisfied	(132)
Make it more user friendly	11
Better/clearer on-screen instructions at help site	7
Make it less confusing/complicated	4
Make the system run faster/less time consuming	3
Make the registration process easier	3
Make it easier to navigate	3
<u>EAR:</u> Base = Users Less Than “Very” Satisfied	(228)
Faster/quicker response to problems	9
Better response need for resolving problems	8
Make the process less time consuming	4
More helpful/knowledgeable reps	4
Prefer to resolve issues with live rep	4
Should be able to resolve more issues	4
<u>TIN Matching:</u> Base = Users Less Than “Very” Satisfied	(100)
Better process of matching system data with client info	6
Clarify error/rejection codes	4

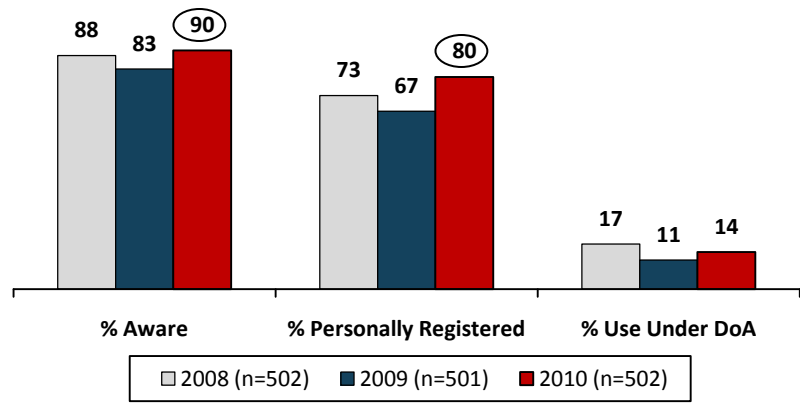
Q15: What specifically would you suggest to the IRS that would improve this particular service?

Findings Among Non-Users Of e-Services

Non-User Awareness, Usage & Likelihood Of Future Use

- After hearing a general Program description (see Page 25), Non-Users were asked their awareness and usage of e-Services. 2010 results showed increases in both Non-User Awareness, and Registration.
 - Note: Non-Users were drawn from the Program’s database and sampled identically to ‘08 and ‘09, with identification in the database as “non-registered users, registered but inactive, newly-registered, or registered but with no record of TDS, EAR, or DA usage within the past year.”

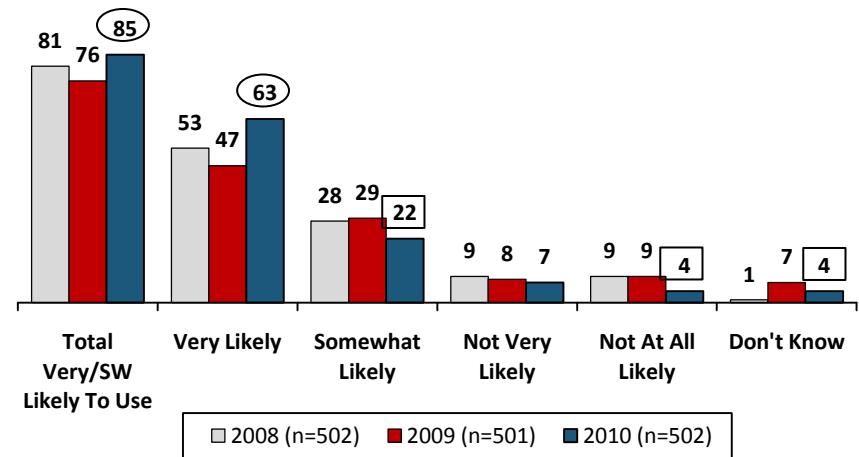
Awareness & Usage Of e-Services: Non-Users, 2008 To 2010



Q1: Prior to today, were you aware of...e-Services?
 Q2: Are you personally registered as a user of e-Services?
 Q3: ...ever access e-Services site...being delegated authority by another member of firm?

- Based upon the same general description of the Program, Non-Users were asked about their Likelihood Of Using e-Services (or using it more) in the future.
- Results showed a significant increase over last year in the proportion of Non-Users who said they were likely to use e-Services, with a particularly sharp increase in those “very likely” to use it.

Non-Users’ Likelihood Of Use Of e-Services, 2008 To 2010



Q18: Based upon everything you now know about e-Services, how likely are you to use it, or use it more often, in the future?

Perceived Likes, Reasons For Non-Use & Suggestions For Stimulating Use

- Non-Users’ perceptions of what they Would Like About e-Services again centered around *ease or convenience* and then *speed in use* – with both perceptions especially strong among those likely to use the Program.

Non-Users’ Perceived Likes Of e-Services, 2010

	Total Non-Users (502) %	Very Likely To Use (317) %	Very/SW Likely To Use (427) %	Not Very/At All Likely (57) %
<u>Ease/Convenience (Net)</u>	<u>37</u>	<u>42</u>	<u>41</u>	<u>18</u>
Would be easy/very convenient	12	15	14	4
Less paperwork	5	6	5	5
<u>Speed In Use (Net)</u>	<u>27</u>	<u>34</u>	<u>30</u>	<u>12</u>
Would be fast/quick to use	10	13	11	5
Quick to get information/data	5	6	5	2
<u>Would Like Specific Services (Net)</u>	<u>18</u>	<u>17</u>	<u>18</u>	<u>16</u>
Transcript delivery system	5	6	5	5
<u>Information (Net)</u>	<u>16</u>	<u>17</u>	<u>16</u>	<u>11</u>
Access to client information files	6	6	6	7
Access to data/information	4	5	5	2
<u>Could Not Name Anything Liked</u>	<u>6</u>	<u>2</u>	<u>3</u>	<u>21</u>

Q19: What if anything do you think you would like about the e-Services program?

- The primary Reason For Non-Use was again (as in ‘09) *lack of need*, followed by *lack of info/awareness*.
- And the top Suggestions For Stimulating Usage were once again to *make it easier to use*, *provide more information about it*, and *increase awareness*.

Top 2010 Reasons For Non-Use & Suggestions For Stimulating Usage

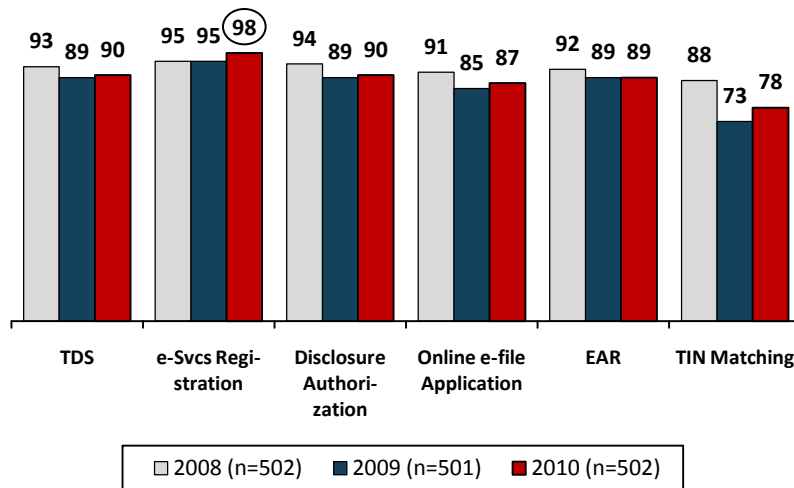
	Total Non-Users (502) %	Very Likely To Use (317) %	Very/SW Likely To Use (427) %	Not Very/At All Likely (57) %
<u>All Mentions Of “No Need” (Net)</u>	<u>45</u>	<u>44</u>	<u>45</u>	<u>47</u>
Don’t need to use it often	10	13	11	5
<u>Lack Of Info/Awareness (Total)</u>	<u>22</u>	<u>19</u>	<u>21</u>	<u>14</u>
Not aware/didn't know about it	12	12	13	5
Don't know enough about it	6	4	6	4
<u>TO STIMULATE USE, IRS SHOULD...</u>				
Make it easier/more user-friendly	15	12	15	19
Provide more education/info	10	10	10	9
Increase awareness of it	10	8	10	7
Nothing/no suggestions	49	53	50	53

Q20:two most important reasons not using e-services?
Q21: Anything IRS can do to make you more interested.

Qualification For & Likelihood Of Use Of Specific e-Services

- Next, after hearing a detailed description of each e-Service (see Page 26), Non-Users were asked if they are Personally Qualified To Use Each Service. 2010 results here showed only one significant change – an increase in mentions of e-Services Registration.

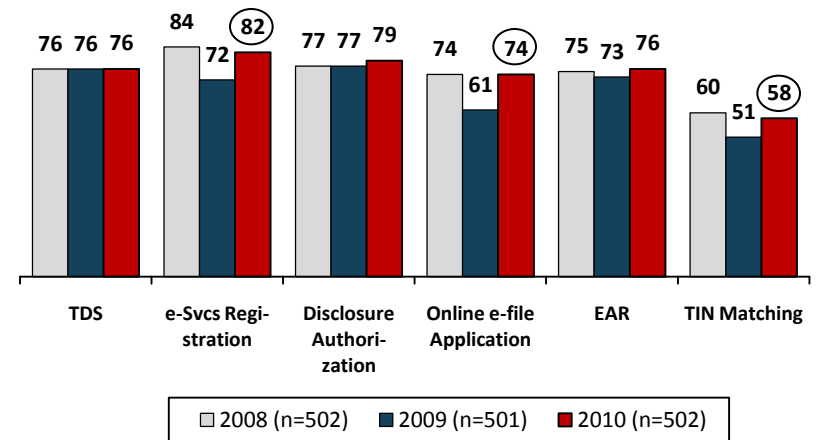
% Of Non-Users In 2010 Who Said That They Are Personally Qualified To Use Each Service



Q23: Based upon the (DETAILED) description, is this a service that you personally would qualify to use?

- Finally for Non-Users, Likelihood Of Usage Of Each Service was higher this year for several services, leaving interest similarly high in 5 of the 6 services. The exception was TIN Matching – which continued to generate less interest than the other services.

% Of Non-Users in 2010 Who Were Very/Somewhat Likely To Use Specific e-Services In The Future



Q24: Assuming you did qualify to use this service, how likely would you be to use it, or use it more, in the future?

Other Learning From Both Users & Non-Users

Usage Of Other Websites & Are There Lessons There For IRS?

- To see if IRS can learn from the website preferences of this audience, respondents were asked about Usage Of Different Types Of Websites. The top types were the same as last year – Online Banking, Government, and Shopping websites. e-Services Users again had higher levels of usage of each type of site than Non-Users.

Other Website Usage & Frequency Of Use

	TOTAL USERS (1405) %	NON- USERS (502) %
<u>% Use Online Banking</u>	64	59
Average Freq. Of Use Per Week	4.6	4.8
<u>% Use Gov't. Sites Other Than irs.gov</u>	75	67
Average Freq. Of Use Per Week	2.8	2.3
<u>% Use Shopping Websites</u>	58	51
Average Freq. Of Use Per Week	1.1	1.1
<u>% Use Credit Card Records & Points Sites</u>	39	32
Average Freq. Of Use Per Week	1.6	1.6
<u>% Use Service Sites—Photo, Memorials, etc.</u>	13	10
Average Freq. Of Use Per Week	1.1	1.1
<u>% Use Blogs Or Discussion Sites</u>	21	15
Average Freq. Of Use Per Week	3.7	3.4

Q36: Please tell me whether you ever use that type of Online service or site.
Q37: About how often do you use it?

- Those using each type of website were asked Which One Specific Site Was Best Of Its Type. Responses were widely distributed, so only the top mentions are shown below – with highlighting of those with notably high mentions.

BEST Site Within Each Type

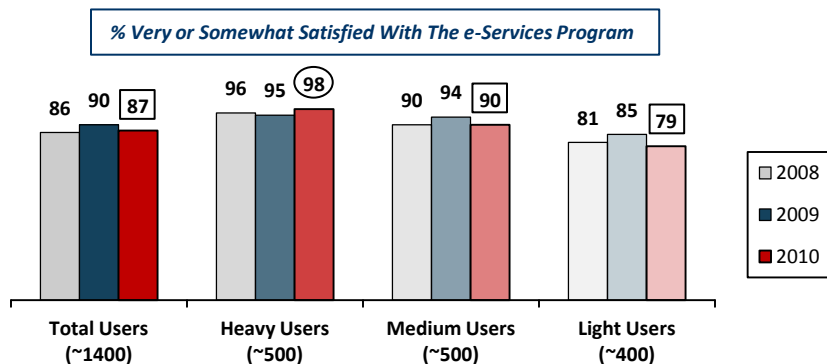
Total Users (BASE VARIES BY SITE TYPE)	TOTAL USERS %	NON- USERS %
<u>BEST Online Banking Sites</u>		
Bank of America	13	13
<u>BEST Other Gov't. Sites</u>		
Social Security Administration	12	7
<u>BEST Blog/Discussion Sites</u>		
Facebook	23	25
<u>BEST Credit Card Sites</u>		
American Express	15	9
Chase	14	11
<u>BEST Shopping Websites</u>		
Amazon	36	31
Ebay	8	9
<u>BEST Service Sites</u>		
Snapfish	11	2
Kodak	6	4
Shutterstock	5	4

Q39: Of all of the different sites you've ever used for this online service/activity, which one would you say is the best at serving your needs?

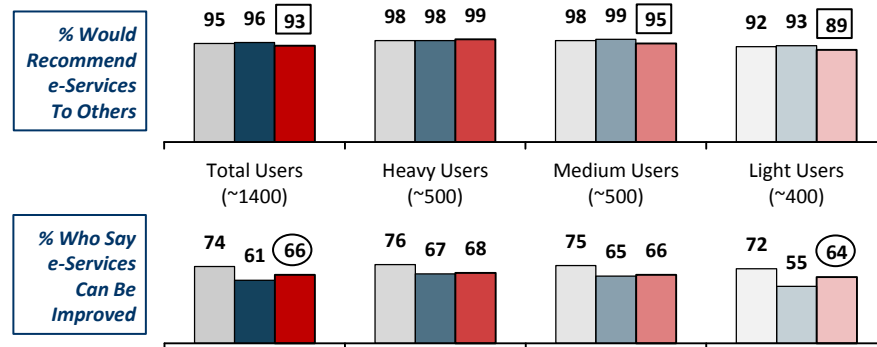
Key Findings

Key Findings

2010 results showed **lower Overall Satisfaction with e-Services**, with **decreases occurring mainly among Light Users and to a lesser extent, Medium Users** (with Heavy Users actually higher).



There were also **declines in Recommendation, with more saying e-Services Can Be Improved**. Again, it was the Light Users (and to some extent, the Medium Users) who were driving these changes.



The positive news from the 2010 study came among **Non-Users**, who had **higher awareness and claimed registration** than last year, along with **higher likelihood of use** of e-Services.

- 85% of Non-Users (vs 76% in 2009) were very/somewhat likely to use the e-Services Program, with the “very likely” rating alone increasing by 16 points, from 47% to 63%.
- Top perceived benefits of the Program were again *Ease/Convenience* and *Speed*, though the main reasons for non-use were still *Lack Of Need*, followed at a lower level by *Lack Of Awareness*.
- Finally, Non-Users had similarly high interest in 5 of the 6 specific Services; the exception was TIN Matching, which had significantly lower interest than the others.

With the Program’s key metrics pointing downward, we looked at Satisfaction with Specific Services and not finding any significant changes (see Page 12), focused on Dimensional ratings of e-Services. Repeating the 2009 Drivers analysis, we found that there are now **4 Key Drivers to Satisfaction with the Overall Program**...

- How Long It Takes To Find The Information That You’re Looking For
- How Long It Takes To Complete An Action
- Ease Of Navigation Of The e-Services Site
- Ease Of Understanding The Content At The e-Services Site

Each of these Key Drivers was rated lower in 2010 and this likely played a role in the declines in Program metrics. Naturally, these 4 dimensions warrant attention and, if possible, improvement.

Appendix

Data From Probes On Password, Tutorials/Training, Other Services & DA

Probes On 6-Mo. Password Re-Set, Tutorial & Other Info/Training

	Total Users	Heavy	Medium	Light
Less Than Very Satisfied w/Tutorials At Diff. Sites	(294)	(87)	(102)	(105)
	%	%	%	%

Q11B—Tutorials That Need Improvement

	%	%	%	%
Overall Tutorial For Full Suite Of e-Services	62	64	64	60
Disclosure Authorization Tutorial	21	21	21	22
Transcript Delivery System Tutorial	20	16	21	20
e-Services Registration Tutorial	19	16	21	19
Electronic Account Resolution Tutorial	12	9	13	11
Online e-file Application Tutorial	10	9	11	10
TIN Matching Tutorial	10	5	9	11

Q11C—Awareness Of Other Info/Training Via...

Total Users	(1405)	(501)	(501)	(403)
	%	%	%	%
IRS Nationwide Tax Forums	68	68	67	70
Nat'l/Local Practitioner Ph Forums, Webinars	54	58	53	54
Small Business Tax Workshop	49	50	49	50
Tax Practitioner Institute Seminars	42	45	37	46
Practitioner Liaison Meetings	39	43	38	39
Practitioner Video & Audio Presentations	38	42	37	38

Q11D—Other Types/Forms Of Training Suggested

Total Suggested Any Other Training	34	26	32	41
More Webinars	4	4	5	4
More Online Tutorials	5	2	4	6
More Local Events (Seminars, etc.)	6	3	5	8

Q16—Probe For Other e-Services Wanted

Less Than Very Satisfied With Avail. Of Services	Total Users	Heavy	Medium	Light
	(643)	(216)	(231)	(196)
	%	%	%	%

Ability to check on payment history	3	2	2	4
Get copies of returns/past returns	3	1	5	3
Ability to access prior-year information	3	3	3	2
Greater access to client info/transcripts	2	3	2	3
Ability to access info w/o a PoA	2	0	2	3
Access W2 information	2	0	3	1

Q17—Probe For How IRS Can Stimulate Usage Of Disclosure Authorization

Total Not Using DA Frequently/Ever	Total Users	Heavy	Medium	Light
	(924)	(161)	(389)	(374)
	%	%	%	%

Lack Of Need (Create Demand)

Depends if client wants/need it	15	23	16	13
No need for it	11	10	12	11

Need More Info About It

Don't know enough about it	5	6	4	6
Don't know how to use it	2	1	1	2
Need education/info on use	1	1	1	2

Make It Easier To Use

Make it easier/less cumbersome	3	16	9	10
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Profile Data From Survey And From List Appends

Demographics And Membership In Professional Organizations

	TOTAL USERS (1405) %	Heavy Users (501) %	Med. Users (501) %	Light Users (403) %	NON- USERS (502) %
Total Users					
Demographics:					
% Male	61	67	60	60	63
% Female	39	33	40	40	37
Average Age	53.6	52.6	53.8	53.8	55.7
Professional Memberships:					
AICPA	39	41	42	35	21
NAEA	20	21	21	19	6
NATP	14	12	16	13	12
NSA	8	6	8	8	4
NSTP	4	2	4	4	3
AAACPA	2	4	2	1	1
All Other Mentions = 1% or Less					

Summary Of Data From Classification Questions

Professional Characteristics

	TOTAL USERS (1401) %	Heavy Users (501) %	Med. Users (500) %	Light Users (400) %	NON- USERS (501) %
Total Users					
Professional Characteristics:					
Acct/CPA, Tax Prep Just A Service	54	58	58	48	45
Enrolled Agent	29	28	29	29	11
Professional Tax Preparer	10	6	7	14	33
Business Taxpayer	3	2	4	3	6
Among Non-Big 2 Tax Professionals:					
% Full-Time Tax Professionals	81	87	83	76	52
Avg. # Years Involved In Tax Preparation	25	25	25	24	25
% Independent Tax Professionals	46	34	43	55	72
Among All Tax Pros (Big 2 Included):					
Avg. # Active Preparers In Firm	43	73	44	30	28
Avg. # Total Returns Prep'd. By Firm	1963	2512	1296	2553	446
Avg. % Of Returns For Business					
Avg. % Of Business Returns e-filed	28	32	29	26	19
Avg. % Of Returns For Individuals					
Avg. % Of Individual Returns e-filed	72	68	72	75	81
Among All Firms – Tax Prep & Otherwise:					
Avg. # Total Employees In Firm	66	128	70	38	48

Summary Of Data From Classification Questions

How e-Services Were Described OVERALL To ALL Respondents

The IRS's e-Services program is a suite of web-based products that allows registered tax professionals and taxpayers to electronically interact with and conduct business with the IRS. The e-Services suite of services includes e-Services Registration, Online e-file Application, Disclosure Authorization, Electronic Account Resolution, Transcript Delivery Service, and Taxpayer Identification Number (TIN) Matching.

- All tax professionals registered with e-Services can use the Registration and Online e-file Application services.
- And, all e-file providers who e-file 5 or more accepted returns a year can use the Disclosure Authorization, Electronic Account Resolution, and Transcript Delivery System services.
- In addition, any payer of income subject to backup withholding or their reporting agents can use the Taxpayer Identification Number or TIN Matching service.

To access e-Services, a tax practitioner or qualified taxpayer or their reporting agent must go to the e-Services site at the IRS's website, irs.gov, and register.

How e-Services Were Described IN DETAIL To NON-USERS

Earlier, we talked about the overall e-Services program. Now I'd like to read a more detailed description of each of the services available to you in the e-Services program at irs.gov, and ask you a couple of questions about each one.

1. **e-Services Registration** is a one-time, online process where you select a username, password and signature PIN. Successful registration is acknowledged onscreen and a confirmation letter is sent to your home.
2. **The Online e-file Application** allows the principal or responsible official of a firm to apply for participation in IRS e-file. Approved applications can be maintained by certain users and the ability to delegate e-Services incentive product access to other employees also exists.
3. **The Disclosure Authorization** service enables you to view, modify, and submit new or existing Powers of Attorney or Tax Information Authorizations receiving immediate acknowledgement of acceptance.
4. **The Electronic Account Resolution** service enables you to submit taxpayer account inquiries and receive a written response in your secure online mailbox within 3 business days. You must have a Power of Attorney, Form 2848, on file for the particular taxpayer, form, and tax period requested.
5. **The Transcript Delivery System** service enables you to submit requests and view online, taxpayer account transcripts, wage & income documents, return transcripts, and verification of non-filing letters. You must have a Power of Attorney, Form 2848, on file for the particular taxpayer, form, and tax period requested.
6. **TIN Matching** is a pre-filing service used to validate Taxpayer ID Numbers. It is available to Payers of income subject to backup withholding who filed within the past two years, any one of six information returns: Forms 1099-B, INT, DIV, OID, PATR, or MISC. You can match up to 25 payee TIN & name combinations in an Interactive online request or you can submit a Bulk file of up to 100,000 TIN and name combinations. Interactive requests are processed immediately and bulk requests can take up to 24 hours. Responses to both types of requests are delivered online.

How Users & Non-Users Were Identified From The IRS Database In 2010

Below are the criteria to be applied to the e-services databases creating the necessary data extract in 2010. Note: Principals can also be responsible officials on the same *e-file* application and both can appear on multiple *e-file* applications. Delegates can also appear on multiple *e-file* applications. There are four user categories for the survey:

Eligible Non-Users – If ERO, Reporting Agent, or Online Provider status = Accepted (2), and 1 or more Incentive or reporting agent product authorizations are present, and Principal, Responsible Official or Delegated User...

is not a registered user, or

is registered and registration status = (I) Inactive, or

is registered, registration status = (N) New but unconfirmed, and today's date \geq reg_create_dt + 60 days, or

is registered, registration status = (C), and there is no record of TDS, EAR, or DA usage within the past year (today's date – 365).

...then, extract data fields for unique records and categorize as Eligible Non-User. 446,426 records available in 2010 – but only 129,956 unique records after de-duping. **Need 10,000 unique records, randomly drawn**. Also, ensure inclusion of all registration status types, as there are a significant number of inactive users that, by itself, could easily satisfy the number of records needed.

Light (Low-Level) Users – Active e-services users. Users that are registered (REG_STATUS_CD=C), are eligible for e-services incentive products or reporting agent e-services and have used TDS, EAR, or DA at least once within the past year but TDS less than 50 times, EAR less than 25 times, or DA less than 25 times. 17,421 records available in 2010, but only 8,331 unique records after de-duping. **Need all de-duped records**.

Medium Users – Active e-service users. Users that are registered (REG_STATUS_CD=C), are eligible for e-services incentive products or reporting agent e-services and have used TDS at least 50 times but less than 500, EAR at least 25 times but less than 100, or DA at least 25 times but less than 250. 19,569 records available in 2010 – but only 9,935 unique records after de-duping. **Need all de-duped records**.

Heavy Users – Active e-service users. Users that are registered (REG_STATUS_CD=C), are eligible for e-services incentive products or reporting agent e-services and have used TDS at least 500 times, EAR at least 100 times, or DA at least 250 times. 5,948 records available in 2010 – but only 3,120 unique records after de-duping. **Need all de-duped records**.

Fields needed in extract for survey: Person Name (unique within each user group), Business Phone, Role: Delegated User, Principle, Responsible Official, Business Name, Organization Address.