

**Findings From The 1065 e-file
Customer Satisfaction Research**

**Benchmarking Satisfaction Prior To
Transition Of 1065 To MeF**

Prepared for:



Publication 4207 (2/2007)

February, 2007

Catalog # 36964Z

Prepared By:



Background, Purpose, Method, Timing & Scope

In 2007, IRS will begin transitioning the 1065 e-file from its legacy program to Modernized e-file.

IRS commissioned the Customer Satisfaction Study reported here to establish a benchmark against which it can measure in 2008 the progress of 1065 e-file. The key benchmarks include...

- § Satisfaction and other measures taken among 1065 e-filers Users.
- § And interest in and reasons for non-usage among 1065 Paper Filers.

The benchmark survey was conducted among 3 distinct business taxpayer groups:

- § Mandated Users of 1065 e-file – firms with more than 100 partners (Schedules K-1).
- § Non-Mandated Users of 1065 e-file – firms with 100 or fewer partners (Schedules K-1).
- § Eligible Non-Users of 1065 e-file (paper filers) – Mandated vs. Non-Mandated falling out naturally.

The study was conducted by telephone from Russell's national telephone interviewing center in Wayne NJ, during the period of November 16, 2006 through January 12, 2007.

Respondents were drawn from randomly selected IRS lists of 1065 e-file Users and Non-Users.

To qualify for the study, respondents had to be the person who is responsible for preparing and submitting Form 1065 for each organization surveyed. In many cases (especially among smaller Partnerships), the actual preparer was an external agent/outside preparer referred to the Russell interviewer by the organization.

A total of 632 interviews was completed...

- § 132 with Mandated Users of 1065 e-file.
 - Note: The IRS list used to screen for the Mandated User cell was too small to yield the proposed ending sample (n=250).
- § 250 with Non-Mandated Users of 1065 e-file.
- § And 250 with Eligible Non-Users of 1065 e-file.

NOTE: While the purpose of this study was to benchmark 1065 e-file performance among the 3 sample groups, we considered comparing data here to past 1065 e-file Customer Satisfaction surveys. We are able to reference past data in the case of Non-Users, who are comprised here in the same way as in past surveys. However, Users here are divided into Mandated vs. Non-Mandated Users and there is no similar division of Users in past surveys. So, our focus here is to benchmark the current situation among the two User groups.

Key Findings

