

## Appendix E: Surveys

[E-1 Online Survey](#)

[E-2 Paper Participant Survey](#)

[E-3 Non-participant Survey](#)

[E-4 Control Group Survey](#)

Thank you for using ReadyReturn to file your 2005 California income tax return. We value your opinion and hope that you will take a few minutes to complete this survey. Your participation in this survey will help us evaluate the ReadyReturn pilot program and measure taxpayer interest in using this service in the future.

**Please respond to the following statements regarding your experience using ReadyReturn:**

- 1. ReadyReturn:**
- |  | Yes                   | No                    | No<br>Opinion         |
|--|-----------------------|-----------------------|-----------------------|
| a. was easy to understand.                               | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| b. made me feel less anxious about filing my tax return. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| c. kept my personal information secure.                  | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| d. is the type of service the government should provide. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

- 2. Compared to how I filed my tax return last year:**
- Note:** You may skip this question if you used ReadyReturn last year.
- |                                     | Yes                   | No                    | No<br>Opinion         |
|-------------------------------------|-----------------------|-----------------------|-----------------------|
| a. I saved time using ReadyReturn.  | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| b. I saved money using ReadyReturn. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| c. ReadyReturn was more convenient. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

**3. Would you use ReadyReturn again next year?**

- Yes
- No
- No Opinion

**4. Please rate your overall satisfaction with ReadyReturn?**

- Very satisfied
- Satisfied
- Dissatisfied
- Very dissatisfied
- No Opinion

**5. How long did it take you to complete and file your return using ReadyReturn?**

hour(s)     minutes

**6. How much money did you spend to complete and file your return using ReadyReturn (include any money you spent on tax preparation, software, etc?)**

\$

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**7. What were the main reasons you chose to use ReadyReturn? (CHECK ALL THAT APPLY)**

- I was invited to participate in the pilot project.
- It was easier than how I filed last year.
- I thought it would save me time.
- I thought it would save me money.
- I could get a faster refund.
- TeleFile is no longer available.
- Other, please specify

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**8. Did having the ReadyReturn invitational letter available in Spanish make it easier to file your tax return?**

- Yes
- No
- Not applicable

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**9. Would you like information to be available in a language other than English?**

- Yes, please specify what language
- No
- Not applicable

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**10. If this is the first time you e-filed your return, what are the main reasons you have not tried e-file before? (CHECK ALL THAT APPLY)**

- Not applicable; I have e-filed my return in the past.
- It costs too much.
- I didn't have access to the Internet.
- I have security concerns about e-filing.
- I have always filed a paper return.
- My preparer didn't offer it.
- It's too complicated.
- Other, please specify

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**11. In general, how do you prefer to prepare your tax return?**

- Complete my own paper return.
- Use a government Website.
- Use a non-government Website or software.
- Use a tax preparer/accountant.
- Other, please specify

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**12. In general, how do you prefer to file your tax return?**

Mail it.

e-file it.

Other, please specify

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**13. The State of California receives your wage and withholding information from your employer(s). How important is it to you to have access to this information?**

Very important

Somewhat important

Not very important

Not at all important

No opinion

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**14. How would you prefer to access your wage and withholding information?**

Online using the Franchise Tax Board's Website

Online using tax preparation software

Through a tax preparer/accountant

Other, please specify

No opinion

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**15. If you have any additional comments, please provide them in the space below:**

Submit

Clear and Start Again

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STATE OF CALIFORNIA  
**FRANCHISE TAX BOARD**  
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STEVE WESTLY  
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**ReadyReturn Easy as 1-2-3**

July 2006

Earlier this year you used ReadyReturn to file your 2005 California personal income tax return. You now have the opportunity to share your opinions of this pilot program.

The following survey is **voluntary**. Your input will **help us** evaluate the ReadyReturn pilot program and measure taxpayer interest in using this type of service. Please be assured that we keep all information you provide strictly confidential. Your name will never be connected with your answers.

Once you have completed the survey, return it to us using the enclosed self-addressed postage-paid envelope. If you have any questions or need help completing the survey, contact Christie Trykar of the Stakeholder Value Research Unit by phone at (916) 845-7979 or send an email to [ReadyReturnSurvey@ftb.ca.gov](mailto:ReadyReturnSurvey@ftb.ca.gov).

Thank you for your time and participation. Your prompt reply is appreciated.

Sincerely,

Christie Trykar  
Research Analyst

/pg



FRANCHISE TAX BOARD

# ReadyReturn Survey

## ReadyReturn Easy as 1-2-3

1. Please respond to the following statements regarding your experience using ReadyReturn.

**ReadyReturn**

- |  | Yes                      | No                       | No Opinion               |
|--|--------------------------|--------------------------|--------------------------|
| a. was easy to understand.                               | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| b. made me feel less anxious about filing my tax return. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| c. kept my personal information secure.                  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| d. is the type of service the government should provide. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

**Compared to how I filed my tax return last year:**

- |                                     | Yes                      | No                       | No Opinion               | N/A - I used ReadyReturn last year. |
|-------------------------------------|--------------------------|--------------------------|--------------------------|-------------------------------------|
| e. I saved time using ReadyReturn.  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |
| f. I saved money using ReadyReturn. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |
| g. ReadyReturn was more convenient. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            |

2. If available, would you use ReadyReturn again next year?

- Yes
- No
- No Opinion

3. Please rate your overall satisfaction with ReadyReturn?

- Very Satisfied
- Satisfied
- Dissatisfied
- Very Dissatisfied
- No Opinion

4. What were the main reasons you chose to use ReadyReturn? **(CHECK ALL THAT APPLY)**

- I was invited to participate in the pilot program.
- It was easier than how I filed last year.
- I thought it would save me time.
- I thought it would save me money.
- I could get a faster refund.
- TeleFile is no longer available.
- Other (Please specify: \_\_\_\_\_)

5. Did having the ReadyReturn invitational letter available in Spanish make it easier to file your tax return?

- Yes
- No
- Not applicable (i.e., I do not read Spanish)

6. Would you like information to be available in a language other than English?

- Yes (Please specify what language: \_\_\_\_\_)
- No
- Not applicable

7. How long did it take you to complete and file your 2005 California personal income tax return?  
 \_\_\_\_\_ hours \_\_\_\_\_ minutes
8. How much money did you spend to complete and file your 2005 California personal income tax return (include any money you spent on tax preparation, software, etc.)?  
 \$\_\_\_\_\_
9. In general, how do you prefer to prepare your tax return?  
 Complete my own paper return.  
 Use a government Website.  
 Use a non-government Website or software.  
 Use a tax preparer/accountant.  
 Other (Please specify: \_\_\_\_\_)
10. In general, how do you prefer to file your tax return?  
 Mail it.  
 e-file it.  
 Other (Please specify: \_\_\_\_\_)
11. The State of California receives your wage and withholding information from your employers. How important is it to you to have access to this information?  
 Very important  
 Somewhat important  
 Not very important  
 Not at all important  
 No opinion
12. How would you prefer to access your wage and withholding information?  
 Online using the Franchise Tax Board's Website  
 Online using tax preparation software  
 Through a tax preparer/accountant  
 Other (Please specify: \_\_\_\_\_)  
 No opinion
13. If you have any additional comments, please provide them in the space below:  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**Thank you for taking the time to complete this survey!**  
**If you have any questions, please contact the Stakeholder Value Research Unit at (916) 845-7979.**



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STEVE WESTLY  
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JOHN CHIANG  
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MICHAEL C. GENEST  
Member

**ReadyReturn Easy as 1-2-3**

July 2006

Earlier this year we invited you to participate in the ReadyReturn pilot program. We have now randomly selected you to share your opinions of this pilot program.

The following survey is **voluntary**. Your input will **help us** evaluate the ReadyReturn pilot program and measure taxpayer interest in using this type of service.

**Even though our records indicate you did not use ReadyReturn to file your 2005 California personal income tax return, we hope you will complete this survey.** Please be assured that we keep all information you provide strictly confidential. Your name will never be connected with your answers.

Once you have completed the survey, return it to us using the enclosed self-addressed postage-paid envelope. If you have any questions or need help completing the survey, contact Christie Trykar of the Stakeholder Value Research Unit by phone at (916) 845-7979 or send an email to [ReadyReturnSurvey@ftb.ca.gov](mailto:ReadyReturnSurvey@ftb.ca.gov).

Thank you for your time and participation. Your prompt reply is appreciated.

Sincerely,

Christie Trykar  
Research Analyst

/ng



FRANCHISE TAX BOARD

ReadyReturn Survey

ReadyReturn Easy as 1-2-3

1. How did you prepare your 2005 California personal income tax return?

- Completed my own paper return.
- Used Franchise Tax Board's CalFile.
- Used a non-government Website or software.
- Used a tax preparer/accountant.
- Other (Please specify: \_\_\_\_\_)
- I have not prepared my 2005 return yet. **(PLEASE SKIP TO QUESTION 5)**

2. How did you file your 2005 California personal income tax return?

- I mailed my return.
- I e-filed my return.
- Other (Please specify: \_\_\_\_\_)
- I have not filed my 2005 return yet. **(PLEASE SKIP TO QUESTION 5)**

3. How long did it take you to complete and file your 2005 California personal income tax return?

\_\_\_\_\_ hours \_\_\_\_\_ minutes

4. How much money did you spend to complete and file your 2005 California personal income tax return (include any money you spent on tax preparation, software, etc.)?

\$ \_\_\_\_\_

5. What were the main reasons you didn't participate in the ReadyReturn pilot program?

**(CHECK ALL THAT APPLY)**

- I needed to file my federal tax return first.
- I had to make more changes than the ReadyReturn Website allowed.
- It was too confusing.
- I prefer to use a tax preparer/accountant.
- I prefer to use a non-government e-file company.
- I don't think filing returns using the Internet is secure.
- I didn't feel comfortable receiving a return completed by the government.
- I didn't have time.
- I need the information in another language.  
(Please specify what language: \_\_\_\_\_)
- Other (Please specify: \_\_\_\_\_)

6. How did you use the ReadyReturn information we sent you? **(CHECK ALL THAT APPLY)**

- I used it to double-check my figures.
- I used it to complete my return myself.
- I gave it to my tax return preparer/accountant.
- I did not use it.
- Other (Please specify: \_\_\_\_\_)

7. In general, how do you prefer to prepare your tax return?

- Complete my own paper return.
- Use a government Website.
- Use a non-government Website or software.
- Use a tax preparer/accountant.
- Other (Please specify: \_\_\_\_\_)

8. In general, how do you prefer to file your tax return?

- Mail it.
- e-file it.
- Other (Please specify: \_\_\_\_\_)

9. The State of California receives your wage and withholding information from your employers. How important is it to you to have access to this information?

- Very important
- Somewhat important
- Not very important
- Not at all important
- No opinion

10. How would you prefer to access your wage and withholding information?

- Online using the Franchise Tax Board's Website
- Online using tax preparation software
- Through a tax preparer/accountant
- Other (Please specify: \_\_\_\_\_)
- No opinion

11. If you have any additional comments, please provide them in the space below:

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**Thank you for taking the time to complete this survey!**  
**If you have any questions, please contact the Stakeholder Value Research Unit at (916) 845-7979.**



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**ReadyReturn Easy as 1-2-3**

July 2006

For the last two years, the Franchise Tax Board has offered a pilot program called ReadyReturn. As part of this program, we selected taxpayers from around the state and provided them with a completed 2005 California personal income tax return using information from their W-2s.

Although we did not randomly select you to participate in the pilot program, we have selected you to participate in this survey. We would like your opinions **about the ReadyReturn concept and filing taxes in general**. Please be assured that we keep all information you provide strictly confidential. Your name will never be connected with your answers.

Once you have completed the survey, return it to us using the enclosed self-addressed postage-paid envelope. If you have any questions or need help completing the survey, contact Christie Trykar of the Stakeholder Value Research Unit by phone at (916) 845-7979 or send an email to [ReadyReturnSurvey@ftb.ca.gov](mailto:ReadyReturnSurvey@ftb.ca.gov).

Thank you for your time and participation. Your prompt reply is appreciated.

Sincerely,

Christie Trykar  
Research Analyst

/cg



FRANCHISE TAX BOARD  
**ReadyReturn Survey**

**ReadyReturn Easy as 1-2-3**

1. How did you prepare your 2005 California personal income tax return?

- Completed my own paper return.
- Used Franchise Tax Board's CalFile.
- Used a non-government Website or software.
- Used a tax preparer/accountant.
- Other (Please specify: \_\_\_\_\_)
- I have not prepared my 2005 return yet. (**PLEASE SKIP TO QUESTION 5**)

2. How did you file your 2005 California personal income tax return?

- I mailed my return.
- I e-filed my return.
- Other (Please specify: \_\_\_\_\_)
- I have not filed my 2005 return yet. (**PLEASE SKIP TO QUESTION 5**)

3. How long did it take you to complete and file your 2005 California personal income tax return?

\_\_\_\_\_ hours \_\_\_\_\_ minutes

4. How much money did you spend to complete and file your 2005 California personal income tax return (include any money you spent on tax preparation, software, etc.)?

\$ \_\_\_\_\_

5. ReadyReturn is a new service the State of California is piloting. Please respond to the following statements based upon the description of ReadyReturn:

A completed tax return is mailed to you from the Franchise Tax Board. The return is pre-filled using wage information sent to the State from your employers. You can verify the return, sign it, and mail it or you can go online to make necessary changes and e-file the return.

- |   | Yes                      | No                       | No Opinion               |
|---|--------------------------|--------------------------|--------------------------|
| a. I would be interested in using this service.                             | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| b. This service would make me feel less anxious about filing my tax return. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| c. This is the type of service the government should provide.               | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

6. In general, how do you prefer to prepare your tax return?

- Complete my own paper return.
- Use a government Website.
- Use a non-government Website or software.
- Use a tax preparer/accountant.
- Other (Please specify: \_\_\_\_\_)

7. In general, how do you prefer to file your tax return?

- Mail it.
- e-file it.
- Other (Please specify: \_\_\_\_\_)

8. The State of California receives your wage and withholding information from your employers. How important is it to you to have access to this information?

- Very important
- Somewhat important
- Not very important
- Not at all important
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- Online using the Franchise Tax Board's Website
- Online using tax preparation software
- Through a tax preparer/accountant
- Other (Please specify: \_\_\_\_\_)
- No opinion

10. If you have any additional comments, please provide them in the space below:

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**Thank you for taking the time to complete this survey!**

**If you have any questions, please contact the Stakeholder Value Research Unit at (916) 845-7979.**