



**Inland Revenue**  
Te Tari Taake

19 May 2023

[Redacted]

Dear [Redacted]

Thank you for your request of 20 April 2023, made under the Official Information Act 1982 (OIA). You requested:

- 1) *Please provide a copy of all surveys which Inland Revenue has sent to any customers in the past three years.*
- 2) *Please also provide any internal codes of conduct relating to communicating with clients who are experiencing liquidation, if any exist.*

On 9 May 2023, you clarified that in question 2 of your request, you are:

*... looking for any codes of best practice or expectations of conduct the IRD has for staff dealing with customers who are either currently in liquidation or who are insolvent and intending to liquidate. If there are no written codes for this, that's all I need to know.*

Thank you for clarifying this part of your request.

**Question 1: All surveys Inland Revenue sent to customers in the past three years**

We have interpreted "surveys" to be formal questionnaires Inland Revenue has sent to customers (people who file a tax return, including companies, trusts, partnerships, individuals and clubs).

The surveys we sent to customers from January 2020 to April 2023 are listed in the table below. Some surveys are ongoing so do not have a specific date.

The surveys are released to you in full except for survey number 35. Personal details in survey 35 are withheld under section 9(2)(a) of the OIA, to protect the privacy of natural persons. No public interest in releasing the withheld information has been identified that would be sufficient to outweigh the reasons for withholding.

Number	Survey name	Survey topic	Survey date	Released in full?
1	<i>RDTI Pilot_Touchpoint 1</i>	Research Development Tax Incentive	Created 21 Feb 2020	Yes
2	<i>RDTI Pilot_Touchpoint 2</i>	Research Development Supplementary returns	29 May 2020	Y
3	<i>SME Compliance Cost Survey Questionnaire</i>	Time and cost of doing taxes for small-to-medium businesses.	2021	Y
4	<i>Bereavement survey May 2022</i>	How we can support customers experiencing bereavement and loss.	May 2022	Y

5	<i>Community Seminar Evaluation</i>	Customer feedback of webinars, workshops and seminars.	Undated	Y
6	<i>CS questions for CX&amp;P – V2</i>	Customer experiences of child support.	Undated	Y
7	<i>Cust Perceptions – WFF Debt Survey</i>	Customer experiences of Working for Families tax credits	Undated	Y
8	<i>Customer Experience</i>	Customers’ experiences of interacting with Inland Revenue	Undated	Y
9	<i>Disputes Review Unit</i>	Customer experiences of adjudications.	Undated	Y
10	<i>Go Live Release 4 Pulse Survey for Employers</i>	Customer experience of submitting employer information.	2020	Y
11	<i>FAM Awareness – Policy Team</i>	Awareness of Working for Families tax credits.	Undated	Y
12	<i>FINAL Health Survey for Business customers</i>	Challenges faced by businesses.	Undated	Y
13	<i>FINAL Health Survey for Ind/Fam Customers</i>	Individual experiences of income tax assessments.	Undated	Y
14	<i>IR-Connection – your voice, your thoughts</i>	Recruitment video (mp4)	Undated	Y
15	<i>Go-Live – AutoCalc 2020 Individuals Questionnaire</i>	Customer responses to emails automatically calculating their tax situation.	2020	Y
16	<i>Questionnaire Investment Income Go-Live Survey 2020</i>	Responses to changes to investment income reporting.	2020	Y
17	<i>GO Live Businesses</i>	Business experiences of using myIR.	2021	Y
18	<i>Go Live Child Support 2 – end of survey testing</i>	Child support customer experiences of using myIR.	2021	Y
19	<i>GO Live Individuals</i>	Individual experiences of using myIR.	2021	Y
20	<i>GO Live Intermediaries</i>	Intermediaries’ (e.g. tax agents’) experiences of using myIR.	2021	Y
21	<i>Go Live R4 Autocalc – Paper Assessments</i>	Customer experiences of tax assessment letters	Created 10 June 2020	Y
22	<i>Survey: Hidden economy</i>	Customer attitudes to cash jobs	Modified 15 Oct 2020	Y
23	<i>IITA Auto Debt Letter</i>	Customer reactions to example income tax assessment letter	2022	Y
24	<i>IITA Auto Write-off letter</i>	Customer reactions to example income tax assessment letter	2022	Y

25	<i>IITA More info letter</i>	Customer reactions to example income tax assessment letter	2022	Y
26	<i>IR Brand Recruitment Script Testing</i>	Customer reactions to recruitment video (see survey no. 14)	Undated	Y
27	<i>Go Live Release 4 Pulse Survey for KiwiSaver Customers</i>	Customer experience of using the KiwiSaver service in myIR	Undated	Y
28	<i>Marketing &amp; Communications – Bank account survey</i>	Customer experience of automatic tax assessments and updating bank account details	Undated	Y
29	<i>RRL_Pre-Campaign</i>	Awareness of changes to tax treatment of losses regarding residential investment properties	Undated	Y
30	<i>Short-process rulings</i>	Customer experience of short-process rulings	Undated	Y
31	<i>Go Live Release 4 Pulse Survey for Student Loan customers</i>	Experience of changes in myIR for student loan customers	Undated	Y
32	<i>Tax Agents – Voice of the customer</i>	Tax agents' experience of working with IR	Updated 27 June 2022	Y
33	<i>Tax Counsel Office Survey</i>	Customer views of Public Statements service	Undated	Y
34	<i>Tax Publication Subscriber Survey</i>	Customer views on tax publications	Undated	Y
35	<i>Taxpayer Rulings – Agent Feedback</i>	Tax agents' experience of taxpayer ruling process	Undated	Released in part
36	<i>Tuned In</i>	Customer feedback on the contact centre	Undated	Y
37	<i>IVR language preferences survey</i>	Words customers expect and prefer	March 2023	Y
38	<i>Account visibility survey</i>	Customer use of myIR	Jan 2023	Y
39	<i>Tax cohort feedback survey</i>	Preferences of customers who are part of the tax cohort	Feb 2023	Y
40	<i>IITA survey</i>	Customer awareness of tax codes	Dec 2022	Y
41	<i>IVR voice preferences survey</i>	Customer views on call centre voices	Nov 2022	Y

You can find reports summarising the results of our surveys, including earlier surveys, on our website ([ird.govt.nz](http://ird.govt.nz)) or at the link [Research and evaluation reports \(ird.govt.nz\)](#).

In addition, Inland Revenue has recently finished a project about high-wealth individuals. Documents about the high-wealth individuals research project are published on our website at: [Online document library - High-wealth individuals research project \(ird.govt.nz\)](#)

The four surveys listed below are refused under section 18(d) of the OIA, as the information is publicly available.

Ref	Survey name	Date
A	<i>Family details collection questionnaire guide</i>	Nov 2021
B	<i>Entity questionnaire guide</i>	Feb 2022
C	<i>Financial questionnaire guide</i>	Jun 2022
D	<i>Supplemental Financial Statement Guide</i>	Aug 2022

**Question 2: Inland Revenue’s codes of best practice or expectations of conduct for staff communicating with customers who are in liquidation or are insolvent and intending to liquidate**

Inland Revenue follows the Companies Act 1993, which applies to everyone (not only Inland Revenue). Under section 289 of the Companies Act, a statutory demand is the first step in legal proceedings to wind up an insolvent company. A statutory demand is essentially a test to see whether a company can pay its debts when they fall due.

Inland Revenue only triggers a liquidation action where the amount of tax owing is material and previous attempts to obtain or negotiate payment have been unsuccessful, or where a negotiated payment has further defaulted.

When a company goes into liquidation, the powers of the directors are suspended, so Inland Revenue only deals with the liquidator or their staff. There are no codes of best practice or expectations of conduct for communicating with the liquidator.

There are no codes of best practice or expectations of conduct for communicating with customers who are in difficulty but not yet in liquidation. This part of your request is therefore refused under section 18(g) of the OIA, as Inland Revenue does not hold the information requested.

**Rights of review**

If you disagree with my decision on your OIA request, you can ask an Inland Revenue review officer to review my decision. To ask for an internal review, please email: [CommissionersCorrespondence@ird.govt.nz](mailto:CommissionersCorrespondence@ird.govt.nz).

Alternatively, under section 28(3) of the OIA, you have the right to ask the Ombudsman to investigate and review my decision. You can contact the office of the Ombudsman at: [info@ombudsman.parliament.nz](mailto:info@ombudsman.parliament.nz). If you choose to have an internal review, you can still ask the Ombudsman for a review.

**Publishing of OIA response**

Please note that Inland Revenue regularly publishes responses to requests that may be of interest to the wider public on its website. We consider that this response is of public interest so will publish this response in due course. Your personal details, or any information that would identify you, will be removed before it is published.

Thank you for your request.

Yours sincerely



Al Warren  
**Acting Customer Segment Leader, Micro-Business and Not-for-Profit**

# Survey: RDTI Pilot\_Touchpoint 1

Created on: Feb 21, 2020 8:55 AM

Last modified on: Nov 25, 2020 12:14 PM

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Thank you for taking time to complete this questionnaire. Your responses will help us to refine the process of enrolling for and receiving the Research Development Tax Incentive, to make it as straightforward as possible. Your individual responses are completely confidential and will only be seen by Inland Revenue's research team. Only 'grouped' information will ever be included in any report, so you cannot be identified. At the conclusion of the pilot evaluation, we will share with you a summary of our findings and how these have been implemented. Click on the 'next' button below to continue

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Question: How did your experience of enrolling for the Research Development Tax Incentive compare to your expectations?

1 – It did not meet my expectations
2
3
4 - It met my expectations
5
6
7 - It exceeded my expectations

Display Logic:

Show this item when the following condition is met:

How did your experience of enrolling for the Research Development Tax Incentive compare to your expectations? Equals 1 – It did not meet my expectations, 2, 3

Question: Please tell us what it was about the experience that did not meet your expectations:

Long text from respondent
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BEGIN Table

Question: Thinking about your experience of enrolling for the R&D Tax Incentive, how much do you agree or disagree that:

Table Sub-Question: It was easy for me to get the information I needed

Strongly agree
Agree
Somewhat agree
Neither agree nor disagree
Somewhat disagree
Disagree
Strongly disagree

Table Sub-Question: I felt confident that I was doing the right thing

Strongly agree
Agree
Somewhat agree
Neither agree nor disagree
Somewhat disagree
Disagree
Strongly disagree

Table Sub-Question: The amount of time involved was acceptable

Strongly agree
Agree
Somewhat agree
Neither agree nor disagree
Somewhat disagree
Disagree
Strongly disagree



Table Sub-Question: It was free from stress or frustration

Strongly agree
Agree
Somewhat agree
Neither agree nor disagree
Somewhat disagree
Disagree
Strongly disagree

Table Sub-Question: I felt reassured I got it right

Strongly agree
Agree
Somewhat agree
Neither agree nor disagree
Somewhat disagree
Disagree
Strongly disagree

END Table of Thinking about your experience of enrolling for the R&D Tax Incentive, how much do you agree or disagree that:

Display Logic:

Show this item when the following condition is met:

It was easy for me to get the information I needed Equals Somewhat disagree, Disagree, Strongly disagree

Question: Please tell us what you found challenging about getting the information you needed:

Long text from respondent

Display Logic:

Show this item when the following condition is met:

I felt confident that I was doing the right thing Equals Somewhat disagree, Disagree, Strongly disagree

Question: Please tell us what would have helped you feel more confident:

Long text from respondent

Display Logic:

Show this item when the following condition is met:

The amount of time involved was acceptable Equals Somewhat disagree, Disagree, Strongly disagree

Question: Please tell us how much time it took, and what would consider an acceptable amount of time:

Long text from respondent

Display Logic:

Show this item when the following condition is met:

It was free from stress or frustration Equals Somewhat disagree, Disagree, Strongly disagree

Question: Please tell us what you found stressful or frustrating about the process:

Long text from respondent

Display Logic:

Show this item when the following condition is met:

I felt reassured I got it right Equals Somewhat disagree, Disagree, Strongly disagree

Question: Please tell us how we could provide more reassurance:

Long text from respondent

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BEGIN Table

Question: Now we have some questions specifically about your participation in the R&D Tax Incentive pilot. Thinking about when you were invited to participate in the pilot, how much do you agree or disagree that:

Table Sub-Question: I was clear about what would be expected of me as a pilot participant.

Strongly agree
Agree
Somewhat agree
Neither agree nor disagree
Somewhat disagree
Disagree
Strongly disagree

Table Sub-Question: The initial conversation was followed up in a timely manner

Strongly agree
Agree
Somewhat agree
Neither agree nor disagree
Somewhat disagree
Disagree
Strongly disagree

Table Sub-Question: I was provided with the information I needed to make a decision about whether to participate

Strongly agree
Agree
Somewhat agree
Neither agree nor disagree
Somewhat disagree
Disagree
Strongly disagree

END Table of Now we have some questions specifically about your participation in the R&D Tax Incentive pilot. Thinking about when you were invited to participate in the pilot, how much do you agree or disagree that:

Display Logic:

Show this item when the following condition is met:

I was clear about what would be expected of me as a pilot participant. Equals Somewhat disagree, Disagree, Strongly disagree

Question: Please tell us what you found unclear about our expectations:

Long text from respondent

Display Logic:

Show this item when the following condition is met:

The initial conversation was followed up in a timely manner Equals Somewhat disagree, Disagree, Strongly disagree

Question: Please tell us how long it took us to follow up, and what would consider an acceptable amount of time:

Long text from respondent

Display Logic:

Show this item when the following condition is met:

I was provided with the information I needed to make a decision about whether to participate Equals Somewhat disagree, Disagree, Strongly disagree

Question: Please tell us what additional information you would have found useful to make a decision:

Long text from respondent

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Question: If you have thoughts on how the process could be improved, please share these with us:

Long text from respondent

Question: Please tell us what worked well for you:

Long text from respondent

Question: In some instances, we may wish to follow up on responses for clarification or additional detail. If your responses to the preceding questions raise concerns, or points for clarification, may we contact you to follow up?

Yes
No

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Thank You Page

Thank you very much. Your questionnaire is now complete. We appreciate the time you have put into this.

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# Survey: RDTI Pilot\_Touchpoint 2

Created on: May 29, 2020 6:55 AM

Last modified on: Nov 25, 2020 12:17 PM

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Thank you for taking time to complete this questionnaire. Your responses will help us to refine the process of completing and submitting the RD Supplementary Return, to make it as straightforward as possible. At the conclusion of the pilot evaluation, we will share with you a summary of our findings and how these have been implemented. Click on the 'next' button below to continue

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Short text from respondent

Question: How did your experience of completing the RD Supplementary Return compare to your expectations?

1 – It did not meet my expectations
2
3
4 - It met my expectations
5
6
7 - It exceeded my expectations

Display Logic:

Show this item when the following condition is met:

How did your experience of completing the RD Supplementary Return compare to your expectations?

Equals 1 – It did not meet my expectations, 2, 3

Question: Please tell us what it was about the experience that did not meet your expectations:

Long text from respondent

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BEGIN Table

Question: Thinking about your experience of completing the R&D Supplementary Return, how much do you agree or disagree that:

Table Sub-Question: I knew what information I needed to provide

Strongly agree
Agree
Somewhat agree
Neither agree nor disagree
Somewhat disagree
Disagree
Strongly disagree

Table Sub-Question: I felt confident that I was doing the right thing

Strongly agree
Agree
Somewhat agree
Neither agree nor disagree
Somewhat disagree
Disagree
Strongly disagree

Table Sub-Question: The amount of time involved was acceptable

Strongly agree
Agree
Somewhat agree
Neither agree nor disagree
Somewhat disagree
Disagree
Strongly disagree

Table Sub-Question: It was free from stress or frustration

Strongly agree
Agree
Somewhat agree
Neither agree nor disagree
Somewhat disagree
Disagree
Strongly disagree

Table Sub-Question: I felt reassured I got it right

Strongly agree
Agree
Somewhat agree
Neither agree nor disagree
Somewhat disagree
Disagree
Strongly disagree

END Table of Thinking about your experience of completing the R&D Supplementary Return, how much do you agree or disagree that:

Display Logic:

Show this item when the following condition is met:

I knew what information I needed to provide Equals Somewhat disagree, Disagree, Strongly disagree

Question: Please tell us what we could have done to help you better understand what information you needed to provide:

Long text from respondent
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Display Logic:

Show this item when the following condition is met:

I felt confident that I was doing the right thing Equals Somewhat disagree, Disagree, Strongly disagree

Question: Please tell us what would have helped you feel more confident:

Long text from respondent

Display Logic:

Show this item when the following condition is met:

The amount of time involved was acceptable Equals Somewhat disagree, Disagree, Strongly disagree

Question: Please tell us how much time it took, and what would consider an acceptable amount of time:

Long text from respondent

Display Logic:

Show this item when the following condition is met:

It was free from stress or frustration Equals Somewhat disagree, Disagree, Strongly disagree

Question: Please tell us what you found stressful or frustrating about the process:

Long text from respondent

Display Logic:

Show this item when the following condition is met:

I felt reassured I got it right Equals Somewhat disagree, Disagree, Strongly disagree

Question: Please tell us how we could provide more reassurance:

Long text from respondent

Question: Have you submitted your RD Supplementary Return?.

Yes
No

Display Logic:

Show this item when the following condition is met:

Have you submitted your RD Supplementary Return?. Equals Yes

BEGIN Table

Question: Thinking about your experience of submitting the R&D Supplementary Return, how much do you agree or disagree that:

Table Sub-Question: I felt confident I had submitted my return correctly

Strongly agree
Agree
Somewhat agree
Neither agree nor disagree
Somewhat disagree
Disagree
Strongly disagree

Table Sub-Question: The information on the status of my submission was helpful

Strongly agree
Agree
Somewhat agree
Neither agree nor disagree
Somewhat disagree
Disagree
Strongly disagree

END Table of Thinking about your experience of submitting the R&D Supplementary Return, how much do you agree or disagree that:

Display Logic:

Show this item when the following condition is met:

I felt confident I had submitted my return correctly Equals Somewhat disagree, Disagree, Strongly disagree

Question: Please tell us what would have helped you feel more confident that you had submitted your return correctly:

Long text from respondent

Display Logic:

Show this item when the following condition is met:

The information on the status of my submission was helpful Equals Somewhat disagree, Disagree, Strongly disagree

Question: Please tell us what would have made the status information in myIR more helpful:

Long text from respondent

Display Logic:

Show this item when the following condition is met:

Have you submitted your RD Supplementary Return?. Equals No

Question: If there is a specific reason you have yet not submitted your return, please tell us what this is:.

Long text from respondent

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Question: If you have thoughts on how the process could be improved, please share these with us:

Long text from respondent

Question: Please tell us what worked well for you:

Long text from respondent

Question: In some instances, we may wish to follow up on responses for clarification or additional detail. If your responses to the preceding questions raise concerns, or points for clarification, may we contact you to follow up?

Yes
No

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Thank You Page

Thank you very much. Your questionnaire is now complete. We appreciate the time you have put into this.

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# 2021 SME Compliance Cost Survey Questionnaire

## Start of INTRODUCTION block of information

Display This Question:

- If Q1 = 1
- Or Q1 = 2
- Or Q1 = 3
- Or Q1 = 4

- Q1 Which of these best describes how you feel about tax?
- I really prefer not to think about it too much
  - I keep a close eye on my tax situation

Values:

- 1 = Prefer not to think about tax
- 2 = Keep a close eye on my tax

## Thanks for taking part!

### How long will it take?

This survey should take around 15 minutes, depending on the taxes your business pays. If you're not able to do the whole survey at one sitting, close your browser window. When you're ready to resume, re-open your email invitation and answer the question again - you'll be taken back to the survey to the place where you left off. All of your earlier answers will have been securely saved.

### What does it cover?

The first part asks about how much time your business spends doing business taxes. Later, there are questions about the value of that time. There are also questions about costs of using other parties outside your business like accountants and tax agents, if you use them.

### Your business was randomly selected

We randomly selected tax numbers for this survey, and yours was one of the numbers selected. The name of the business registered against that tax number is \${e://Field/BUSINESS\_NAME}.

### More than one business?

If you have more than one business, please answer this survey about \${e://Field/BUSINESS\_NAME}, not your other business(es).

### Privacy

Please be assured your privacy will be protected and your answers are confidential. Information you provide will only be used for research purposes. Your answers will be combined with those of others. Only grouped information will be included in any report or presentation of the findings.

Page break

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## RUNNING YOUR BUSINESS block of questions

### Q12 Running your business

Which of the following did your business pay or complete a return for during the last 12 months (Include those where an accountant or tax agent completed the return on behalf of the business).

- GST
- Income tax (including Provisional tax)
- Employer Information (payday filing)
- Fringe Benefit Tax (including a nil return)
- None of the above

Values identical to 2018 survey:  
 GST = 1  
 Income tax = 2  
 Employer Information (payday filing) = 4  
 FBT = 5  
 None = 6

Page break -----

Q13 Which of the following has your business used for tax purposes in the last 12 months? *Select all that apply*

- A tax agent or tax adviser
- An accountant / bookkeeper
- A payroll service
- A tax lawyer
- None of the above

Values:  
 1 = Tax agent or tax adviser  
 2 = Accountant / bookkeeper  
 3 = Payroll service  
 4 = Tax lawyer  
 5 = None

Page break -----

Q14 Which of the following does your business use to manage its accounts? *Select all that apply*

- A desktop accounting software package
- An online accounting system
- Spreadsheets (e.g. in Excel) developed in-house
- Paper-based filing and accounting system
- No particular filing system, but I keep records of my accounts and paperwork
- Some other method
- Don't keep records
- Don't know
- None of the above

Values:  
 1 = A desktop accounting software package  
 2 = An online accounting system  
 3 = Spreadsheets  
 4 = Paper-based  
 5 = No particular filing system  
 6 = Some other method  
 7 = Don't keep records  
 8 = Don't know  
 9 = None

Page break -----

Display This Question:

If Q14 = 1  
Or Q14 = 2

Q15 Who is the supplier of your accounting software or online accounting system?

- Accomplish Cash Manager
- Accredo
- Cashbook Complete
- CRS Software / Cash Manager Rural
- MYOB
- Quicken / QuickBooks
- Reckon
- Xero
- Other supplier
- Not sure / don't know

Values:  
1 = Accomplish Cash Manager  
2 = Accredo  
3 = Cashbook Complete  
4 = CRS Software / Cash Manager Rural  
5 = MYOB  
6 = Quicken / QuickBooks  
7 = Reckon  
8 = Xero  
9 = Other supplier  
10 = Not sure / don't know

Page break

Q16 Does your business use a separate bank account for tax?

- Yes
- No
- Not sure / don't know

Values:  
1 = Yes  
2 = No  
3 = Not sure/don't know

Page break

Q17 How many people has your business had on its payroll in the last 12 months? That is, the cumulative number of unique individuals on your payroll in the last year. Count all the people who were paid by the business, including part-timers.

- 0 people
- 1-5 people
- 6-10 people
- 11-20 people
- 21-30 people
- 31-49 people
- 50 or more people
- Not sure / don't know

Values:  
0 = 0 people  
1 = 1-5 people  
2 = 6-10 people  
3 = 11-20 people  
4 = 21-30 people  
5 = 31-49 people  
6 = 50 or more people  
7 = Not sure / don't know

Page break

Display This Question:  
If Q17 ≠ 0

Q18 How does your business process staff wages (payroll)? *Select all that apply*

Display This Choice:  
If Q13 = 3

- A payroll service provider does it for us
- A desktop payroll software package
- An online payroll system
- Spreadsheets (e.g. in Excel), developed in-house
- Paper-based system
- No particular system, but I keep records of my staff and their wages
- Some other method
- None of the above

Values:

- 1 = A payroll service provider does it for us
- 2 = A desktop payroll software package
- 3 = An online payroll system
- 4 = Spreadsheets
- 5 = Paper-based system
- 6 = No particular system
- 7 = Some other method
- 8 = None

Page break

Display This Question:  
If Q17 ≠ 0

Q19 Were any of the people on your payroll in the last 12 months, seasonal or temporary workers?

- Yes
- No
- Not sure / don't know

Values:

- 1 = Yes
- 2 = No
- 3 = Not sure / don't know

Page break

Display This Question:  
If Q19 = 1

Q20 And what percentage of the total number of people on your payroll in the last 12 months, were seasonal or temporary workers? *Please enter numbers without the percentage sign (%)*

 %

Values:  
Numeric  
Minimum = 0  
Maximum = 100

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## TIME & COST OF BUSINESS TAXES block of information

Display This Question:  
If Q12 ≠ 6

### Time and cost of doing your business taxes

You may have heard the phrase "tax compliance" before - which is just another way of saying the time and cost to your business of doing its taxes.

#### What counts as tax compliance?

Activities like:

- recording tax information
- calculating and paying tax
- dealing with Inland Revenue using accountants, tax agents and other tax advisors
- learning about tax matters.

#### What doesn't count as tax compliance

Activities like:

- processing customer invoices / cash received
- following up debtors
- banking, paying bills and wages
- stock control
- investment planning unrelated to tax.

#### Time spent by people in your business

You'll be asked to estimate how much time is spent on business taxes by people inside your business - including you. Please estimate the time spent on each activity.

#### Cost of outside help

If you use outside parties like an accountant or tax agent to help with your business' taxes, you'll be asked to estimate how much they cost your business last year.

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GST block of questions

Display This Question:  
If Q12 = 1

- Q21 **GST**  
How frequently does your business file GST?
- Each month
  - Every 2 months
  - Every 6 months
  - Once every 12 months
  - Not sure / don't know

Values:  
1 = Each month  
2 = Every 2 months  
3 = Every 6 months  
4 = Once every 12 months  
5 = Not sure / don't know

Page break

Display This Question:  
If Q12 = 1

- Q22 Thinking of the last time you dealt with your business' GST obligations, please estimate how much time it took for each of these activities. *Make sure to take account of how often your business files GST. For example, if you file monthly, work out how much time was spent doing your business' GST last month. If you do some activities annually, divide the annual time by how frequently you file GST.*

	Hours	Minutes
Recording information needed for GST (e.g. GST amounts)	▼ Not applicable Not sure/ don't know (1 ... 250+)	▼ Not applicable ot sure / don't know (1 ... 59)
Calculating GST, completing and returning tax forms, paying GST	▼ Not applicable Not sure/ don't know (1 ... 250+)	▼ Not applicable ot sure / don't know (1 ... 59)
Dealing with tax agents, advisors and accountants about GST (including providing information to them)	▼ Not applicable Not sure/ don't know (1 ... 250+)	▼ Not applicable ot sure / don't know (1 ... 59)
Learning about new or existing tax laws (e.g. from newsletters, Tax Information Bulletin, the Internet)	▼ Not applicable Not sure/ don't know (1 ... 250+)	▼ Not applicable ot sure / don't know (1 ... 59)
Dealing with Inland Revenue about GST (e.g. letters, phone calls, visits, email)	▼ Not applicable Not sure/ don't know (1 ... 250+)	▼ Not applicable ot sure / don't know (1 ... 59)
Advice about GST (e.g. whether to apply for a refund)	▼ Not applicable Not sure/ don't know (1 ... 250+)	▼ Not applicable ot sure / don't know (1 ... 59)
Other GST activities	▼ Not applicable Not sure/ don't know (1 ... 250+)	▼ Not applicable ot sure / don't know (1 ... 59)

Values in Hours drop down boxes  
888 = Not applicable  
999 = Not sure/don't know  
0 to 250+

Values in Minutes drop down boxes  
888 = Not applicable  
999 = Not sure/don't know  
0 to 59

Page break

Display This Question:  
If Q12 = 1

Q23 What percentage of the  $\{e://Field/GSTHoursTotal\}$  hours and  $\{e://Field/GSTMinutesRemainder\}$  minutes required for GST was spent by the following people? Please enter numbers without the % sign and make sure the rows add up to 100%.

Owners, partners, directors, trustees (this could include you)  %

Display This Choice:  
If Q17 ≠ 0

Paid employees (e.g. clerks, managers, internal accountants, IT staff)  %

Unpaid friends or relatives  %

Total  %

Values for each row  
Numeric  
Minimum = 0  
Maximum = 100

Page break

Display This Question:  
If Q12 = 1

Q24 During the last 12 months, how stressful did you find meeting your requirements for GST, including finding the money?

- 1 = Not at all stressful
- 2
- 3
- 4 = Moderately stressful
- 5
- 6
- 7 = Extremely stressful

Values  
1 = Not at all stressful  
2 = 2  
3 = 3  
4 = Moderately stressful  
5 = 5  
6 = 6  
7 = Extremely stressful

Page break



Display This Question:

If Q14 = 1  
And Q12 = 1  
Or Q14 = 2  
And Q12 = 1

Q25 Do you use your desktop accounting software or online accounting service to help with preparing your GST returns?

- Yes
- No
- Not sure / don't know

Values:

1 = Yes  
2 = No  
3 = Not sure/don't know

Page break

Display This Question:

If Q12 = 1

Q26 How does your business send its GST returns through to Inland Revenue?

Display This Choice:

If Q4 = 1  
Or Q4 = 2  
Or Q4 = 4

- Accountant or bookkeeper or tax agent / advisor or lawyer does it

Display This Choice:

If Q5 = 1  
Or Q5 = 2

- Direct from accounting software or online accounting service
- Through Inland Revenue's website (myIR)
- In the post
- Other method
- Not sure / don't know

Values

1 = Accountant or bookkeeper or tax agent / advisor or lawyer does it  
2 = Direct from accounting software or online accounting service  
3 = Through Inland Revenue's website (myIR)  
4 = In the post  
5 = Other method  
6 = Not sure / don't know

Page break

INCOME TAX & PROVISIONAL TAX block of questions

Display This Question:  
If Q12 = 2

Q27 Income Tax & Provisional Tax

Thinking about completing your business' last annual Income Tax (and Provisional Tax) return, please estimate how much time it took for each of the following activities.

	Hours	Minutes
Recording information needed for Income Tax and Provisional Tax (e.g. recording business expenses)	▼ Not applicable Not sure/ don't know (1 ... 250+)	▼ Not applicable ot sure / don't know (1 ... 59)
Calculating tax, completing and returning tax forms, paying tax	▼ Not applicable Not sure/ don't know (1 ... 250+)	▼ Not applicable ot sure / don't know (1 ... 59)
Dealing with tax agents, advisors and accountants about Income Tax and / or Provisional Tax (including providing information to them)	▼ Not applicable Not sure/ don't know (1 ... 250+)	▼ Not applicable ot sure / don't know (1 ... 59)
Learning about new or existing tax laws (e.g. from newsletters, Tax Information Bulletin, the Internet)	▼ Not applicable Not sure/ don't know (1 ... 250+)	▼ Not applicable ot sure / don't know (1 ... 59)
Dealing with Inland Revenue about Income Tax and / or Provisional Tax (e.g. letters, phone calls, visits, email)	▼ Not applicable Not sure/ don't know (1 ... 250+)	▼ Not applicable ot sure / don't know (1 ... 59)
Advice about Income Tax and / or Provisional Tax (e.g. for losses)	▼ Not applicable Not sure/ don't know (1 ... 250+)	▼ Not applicable ot sure / don't know (1 ... 59)
Other Income Tax and Provisional Tax activities	▼ Not applicable Not sure/ don't know (1 ... 250+)	▼ Not applicable ot sure / don't know (1 ... 59)

Values in Hours drop down boxes  
888 = Not applicable  
999 = Not sure/don't know  
0 to 250 +

Values in Minutes drop down boxes  
888 = Not applicable  
999 = Not sure/don't know  
0 to 59

Page break

Display This Question:  
If Q12 = 2

Q28 What percentage of the  $\{e://Field/INCHoursTotal\}$  hours and  $\{e://Field/INCMinutesRemainder\}$  minutes required for Income Tax and Provisional Tax was spent by the following people? Please make sure the rows add up to 100%.

Owners, partners, directors, trustees (this could include you)  %

Display This Choice:  
If Q17 ≠ 0

Paid employees (e.g. clerks, managers, internal accountants, IT staff)  %

Unpaid friends or relatives  %

Total  %

Values for each row  
Numeric

Minimum = 0  
Maximum = 100

Page break

Display This Question:  
If Q12 = 2

Q29 During the last 12 months, how stressful did you find meeting your requirements for Income Tax and Provisional Tax, including finding the money?

- 1 = Not at all stressful
- 2
- 3
- 4 = Moderately stressful
- 5
- 6
- 7 = Extremely stressful

Values  
1 = Not at all stressful  
2 = 2  
3 = 3  
4 = Moderately stressful  
5 = 5  
6 = 6  
7 = Extremely stressful

Page break

Display This Question:  
If Q14 = 1  
And Q12 = 2

Or Q14 = 2  
And Q12 = 2

Q30 Do you use your desktop accounting software or online accounting service to help with preparing your Income Tax or Provisional Tax returns?

- Yes
- No
- Not sure / don't know

Values:  
1 = Yes  
2 = No  
3 = Not sure/don't know

Page break

Display This Question:  
If Q12 = 2

Q31 How does your business send its Income Tax or Provisional Tax returns through to Inland Revenue?

Display This Choice:

If Q4 = 1

Or Q4 = 2

Or Q4 = 4

- Accountant or bookkeeper or tax agent / advisor or lawyer does it

Display This Choice:

If Q5 = 1

Or Q5 = 2

- Direct from accounting software or online accounting service  
 Through Inland Revenue's website (myIR)  
 In the post  
 Other method  
 Not sure / don't know

Values

1 = Accountant or bookkeeper or tax agent / advisor or lawyer does it

2 = Direct from accounting software or online accounting service

3 = Through Inland Revenue's website (myIR)

4 = In the post

5 = Other method

6 = Not sure / don't know

Page break

Display This Question:  
If Q12 = 2  
And Q31 = 2

Q32 Is your accounting software or online service Accounting Income Method or AIM-capable?  
(Accounting Income method is a provisional tax option that uses accounting software to work out how much provisional tax small businesses will have to pay throughout the year.)

- Yes  
 No  
 Not sure / don't know

Values:

1 = Yes

2 = No

3 = Not sure / don't know

Page break

**KIWISAVER block of questions**

Display This Question:  
If Q17 ≠ 0  
And Q12 = 3

**Q33 KiwiSaver**

Does your business make contributions to any of your employees' KiwiSaver accounts?

- Yes
- No
- Not sure / don't know

Values:  
1 = Yes  
2 = No  
3 = Not sure/don't know

Page break

Display This Question:  
If Q33 = 1

When estimating the time your business spends on KiwiSaver, make sure to include:

- helping employees enroll or opt-out of KiwiSaver
- deductions from employees' wages or salaries
- employer contributions to employees' KiwiSaver accounts
- working out and paying ESCT (Employer Superannuation Contribution Tax)
- contribution holidays
- changes to employees' contribution rates.

**Q34** Thinking of the last time you dealt with your business' KiwiSaver obligations, please estimate how much time it took for each of these activities.

	Hours	Minutes
Recording information needed for KiwiSaver (e.g. enrolling employees, processing opt-outs)	▼ Not applicable Not sure/ don't know (1 ... 250+)	▼ Not applicable ot sure / don't know (1 ... 59)
Calculating, completing and returning KiwiSaver forms, paying KiwiSaver (including making KiwiSaver deductions and paying your employer contributions)	▼ Not applicable Not sure/ don't know (1 ... 250+)	▼ Not applicable ot sure / don't know (1 ... 59)
Dealing with tax agents, advisors and accountants about KiwiSaver (including providing information to them)	▼ Not applicable Not sure/ don't know (1 ... 250+)	▼ Not applicable ot sure / don't know (1 ... 59)
Learning about new or existing tax laws (e.g. from newsletters, Tax Information Bulletin, the Internet)	▼ Not applicable Not sure/ don't know (1 ... 250+)	▼ Not applicable ot sure / don't know (1 ... 59)
Dealing with Inland Revenue about KiwiSaver (e.g. letters, phone calls, visits, email)	▼ Not applicable Not sure/ don't know (1 ... 250+)	▼ Not applicable ot sure / don't know (1 ... 59)

Advice about KiwiSaver	▼ Not applicable Not sure/ don't know (1 ... 250+)	▼ Not applicable ot sure / don't know (1 ... 59)
Other KiwiSaver activities	▼ Not applicable Not sure/ don't know (1 ... 250+)	▼ Not applicable ot sure / don't know (1 ... 59)

<i>Values in Hours drop down boxes</i> 888 = Not applicable 999 = Not sure/don't know 0 to 250 +	<i>Values in Minutes drop down boxes</i> 888 = Not applicable 999 = Not sure/don't know 0 to 59
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Page break -----

*Display This Question:*  
If Q33 = 1

Q35 What percentage of the  $\{e://Field/KSHoursTotal\}$  hours and  $\{e://Field/KSMinutesRemainder\}$  minutes required for KiwiSaver was spent by the following people? Please make sure the rows add up to 100%.

Owners, partners, directors, trustees (this could include you)  %

*Display This Choice:*  
If Q17 ≠ 0

Paid employees (e.g. clerks, managers, internal accountants, IT staff)  %

Unpaid friends or relatives  %

Total  %

*Values for each row*  
 Numeric  
 Minimum = 0  
 Maximum = 100

Page break -----

*Display This Question:*  
If Q33 = 1

Q36 During the last 12 months, how stressful did you find meeting your requirements for KiwiSaver, including finding the money?

- 1 = Not at all stressful
- 2
- 3
- 4 = Moderately stressful
- 5
- 6
- 7 = Extremely stressful

*Values*  
 1 = Not at all stressful  
 2 = 2  
 3 = 3  
 4 = Moderately stressful  
 5 = 5  
 6 = 6  
 7 = Extremely stressful

Page break

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**EMPLOYER INFORMATION (payday filing) block of questions**

Display This Question:  
If Q12 = 3

**Q43 Employer information (payday filing)**

How often does your business do payday filing of employment information for Inland Revenue?

- Monthly
- Fortnightly (once every 2 weeks)
- Weekly
- Other frequency
- Not sure / don't know

Values:  
1 = Monthly  
2 = Fortnightly (once every 2 weeks)  
3 = Weekly  
4 = Other frequency  
5 = Not sure / don't know

Page break

Display This Question:  
If Q12 = 3  
And Q33 = 1

The next questions are about the time your business spends on payday filing of employment information, in addition to the time spent on KiwiSaver and ECST that you've already mentioned.

Display This Question:  
If Q12 = 3

**Q44 In addition to PAYE and ACC Earner levies, remember to include any time spent on:**

- employees' Student Loan repayments
- employees' child support payments
- employees' payroll giving (charitable donations)
- withholding taxes for contractors.

Thinking of the last time you did payday filing of your business' employment information, please estimate how much time it took for each of these activities. *Please take account of how often you do payday filing. For example, if you file weekly, work out how much time was spent doing your business' employment information last week. If you do some of the activities annually, divide the annual time by how often you do payday filing.*

	Hours	Minutes
Recording employment information needed (e.g. employee tax codes)	▼ Not applicable Not sure/ don't know (1 ... 250+)	▼ Not applicable ot sure / don't know (1 ... 59)
Calculating PAYE, completing and returning the employment information, paying PAYE	▼ Not applicable Not sure/ don't know (1 ... 250+)	▼ Not applicable ot sure / don't know (1 ... 59)
Dealing with tax agents, advisors, and accountants about PAYE (including providing information to them	▼ Not applicable Not sure/ don't know (1 ... 250+)	▼ Not applicable ot sure / don't know (1 ... 59)



Dealing with payroll service providers about PAYE (including providing information to them)	▼ Not applicable Not sure/ don't know (1 ... 250+)	▼ Not applicable ot sure / don't know (1 ... 59)
Learning about new or existing tax laws (e.g. from newsletters, PAYE deductions worksheet, the Internet)	▼ Not applicable Not sure/ don't know (1 ... 250+)	▼ Not applicable ot sure / don't know (1 ... 59)
Dealing with Inland Revenue about employer information and payday filing (e.g. letters, phone calls, visits, email)	▼ Not applicable Not sure/ don't know (1 ... 250+)	▼ Not applicable ot sure / don't know (1 ... 59)
Advice about PAYE	▼ Not applicable Not sure/ don't know (1 ... 250+)	▼ Not applicable ot sure / don't know (1 ... 59)
Other employment information or payday filing activities	▼ Not applicable Not sure/ don't know (1 ... 250+)	▼ Not applicable ot sure / don't know (1 ... 59)

Values in Hours drop down boxes 888 = Not applicable 999 = Not sure/don't know 0 to 250      +	Values in Minutes drop down boxes 888 = Not applicable 999 = Not sure/don't know 0 to 59
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Page break -----

Display This Question:  
If Q12 = 3

**Q45** What percentage of  $\{e://Field/PDFHoursTotal\}$  hours and  $\{e://Field/PDFMinutesRemainder\}$  minutes required for payday filing of employer information was spent by the following people? Please make sure the rows add up to 100%.

Owners, partners, directors, trustees (this could include you)  %

Display This Choice:  
If Q17 ≠ 0

Paid employees (e.g. clerks, managers, internal accountants, IT staff)  %

Unpaid friends or relatives  %

---

Total  %

Values for each row Numeric Minimum = 0 Maximum = 100
--

Page break -----

Display This Question:  
If Q12 = 3

Q46 During the last 12 months, how stressful did you find meeting your payday filing requirements, including finding the money for PAYE?

- 1 = Not at all stressful
- 2
- 3
- 4 = Moderately stressful
- 5
- 6
- 7 = Extremely stressful

Values  
1 = Not at all stressful  
2 = 2  
3 = 3  
4 = Moderately stressful  
5 = 5  
6 = 6  
7 = Extremely stressful

Page break

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FBT block of questions

Display This Question:  
If Q12 = 4

Q47 Fringe Benefit Tax

Fringe Benefit Tax How frequently does your business file Fringe Benefit Tax?

Select one

- Each quarter
- Once a year
- Other frequency
- Not sure / don't know

Values:  
1 = Each quarter  
2 = Once a year  
3 = Other frequency  
4 = Not sure/don't know

Page break

Display This Question:  
If Q12 = 4

Q48 Thinking of the last time you dealt with your business' Fringe Benefit Tax (FBT) obligations, please estimate how much time it took for each of these activities. Remember to take account of how often your business files FBT. For example, if you file quarterly, work out how much time was spent doing your business' FBT last quarter.

	Hours	Minutes
Recording information needed for Fringe Benefit Tax	▼ Not applicable Not sure/ don't know (1 ... 250+)	▼ Not applicable ot sure / don't know (1 ... 59)
Calculating tax, completing and returning tax forms, paying tax	▼ Not applicable Not sure/ don't know (1 ... 250+)	▼ Not applicable ot sure / don't know (1 ... 59)
Dealing with tax agents, advisors and accountants about Fringe Benefit Tax (including providing information to them)	▼ Not applicable Not sure/ don't know (1 ... 250+)	▼ Not applicable ot sure / don't know (1 ... 59)
Dealing with payroll service providers about Fringe Benefit Tax (including providing information to them)	▼ Not applicable Not sure/ don't know (1 ... 250+)	▼ Not applicable ot sure / don't know (1 ... 59)
Learning about new or existing tax laws (e.g. from newsletters, Tax Information Bulletin, the Internet)	▼ Not applicable Not sure/ don't know (1 ... 250+)	▼ Not applicable ot sure / don't know (1 ... 59)
Dealing with Inland Revenue about Fringe Benefit Tax (e.g. letters, phone calls, visits, email)	▼ Not applicable Not sure/ don't know (1 ... 250+)	▼ Not applicable ot sure / don't know (1 ... 59)

Advice about Fringe Benefit Tax	▼ Not applicable Not sure/ don't know (1 ... 250+)	▼ Not applicable ot sure / don't know (1 ... 59)
Other Fringe Benefit Tax activities	▼ Not applicable Not sure/ don't know (1 ... 250+)	▼ Not applicable ot sure / don't know (1 ... 59)

<i>Values in Hours drop down boxes</i> 888 = Not applicable 999 = Not sure/don't know 0 to 250 +	<i>Values in Minutes drop down boxes</i> 888 = Not applicable 999 = Not sure/don't know 0 to 59
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Page break -----

*Display This Question:*  
*If Q12 = 4*

Q49 What percentage of  $\{e://Field/FBTHoursTotal\}$  hours and  $\{e://Field/FBTMinutesRemainder\}$  minutes required for Fringe Benefit Tax was spent by the following people? Please make sure the rows add up to 100%.

Owners, partners, directors, trustees (this could include you)  %

*Display This Choice:*  
*If Q17 ≠ 0*

Paid employees (e.g. clerks, managers, internal accountants, IT staff)  %

Unpaid friends or relatives  %

Total  %

*Values for each row*  
*Numeric*  
*Minimum = 0*  
*Maximum = 100*

Page break -----

*Display This Question:*  
*If Q12 = 4*

Q50 During the last 12 months, how stressful did you find meeting your requirements for Fringe Benefit Tax, including finding the money?

- 1 = Not at all stressful
- 2
- 3
- 4 = Moderately stressful
- 5
- 6
- 7 = Extremely stressful

*Values*  
 1 = Not at all stressful  
 2 = 2  
 3 = 3  
 4 = Moderately stressful  
 5 = 5  
 6 = 6  
 7 = Extremely stressful

Page break -----

Display This Question:

If Q14 = 1  
And Q12 = 4

Or Q14 = 2  
And Q12 = 4

- Q51 Do you use your desktop accounting software or online accounting service to help with preparing your Fringe Benefit Tax returns?
- Yes
  - No
  - Not sure / don't know

Values:

1 = Yes  
2 = No  
3 = Not sure/don't know

Page break -----

Display This Question:

If Q12 = 4

- Q52 How does your business send its Fringe Benefit Tax returns through to Inland Revenue?

Display This Choice:

If Q13 ≠ 5

- Payroll services provider, accountant or bookkeeper or tax agent / advisor or lawyer does it

Display This Choice:

If Q18 = 2

Or Q18 = 3

- Direct from accounting software or online accounting service
- Through Inland Revenue's website (myIR)
- In the post
- Other method
- Not sure / don't know

Values:

1 = Payroll services provider, accountant or bookkeeper or tax agent / advisor or lawyer does it  
2 = Direct from accounting software or online accounting service  
3 = Through Inland Revenue's website (myIR)  
4 = In the post  
5 = Other method  
6 = Not sure / don't know

Page break -----

VALUE OF TIME block of questions

Value of time

This question is about the value of time for the internal people doing the business' taxes:

- Owners, partners, directors, trustees - this could include you
- Paid employees.

Display This Question:  
If Q12 ≠ 6

Owners, partners, directors, trustees

Q53 What is the hourly pay before tax, for the person who spends most time on your business taxes?  
TIP: divide an annual salary by 2,087 to get an hourly rate (2,087 is the number of working hours in a year). Enter hourly rates as dollars and cents separated by a decimal point without a \$ sign (that is, 00.00).

\$

Values  
Numeric  
Minimum = 0  
No maximum

Display This Question:  
If Q17 ≠ 0

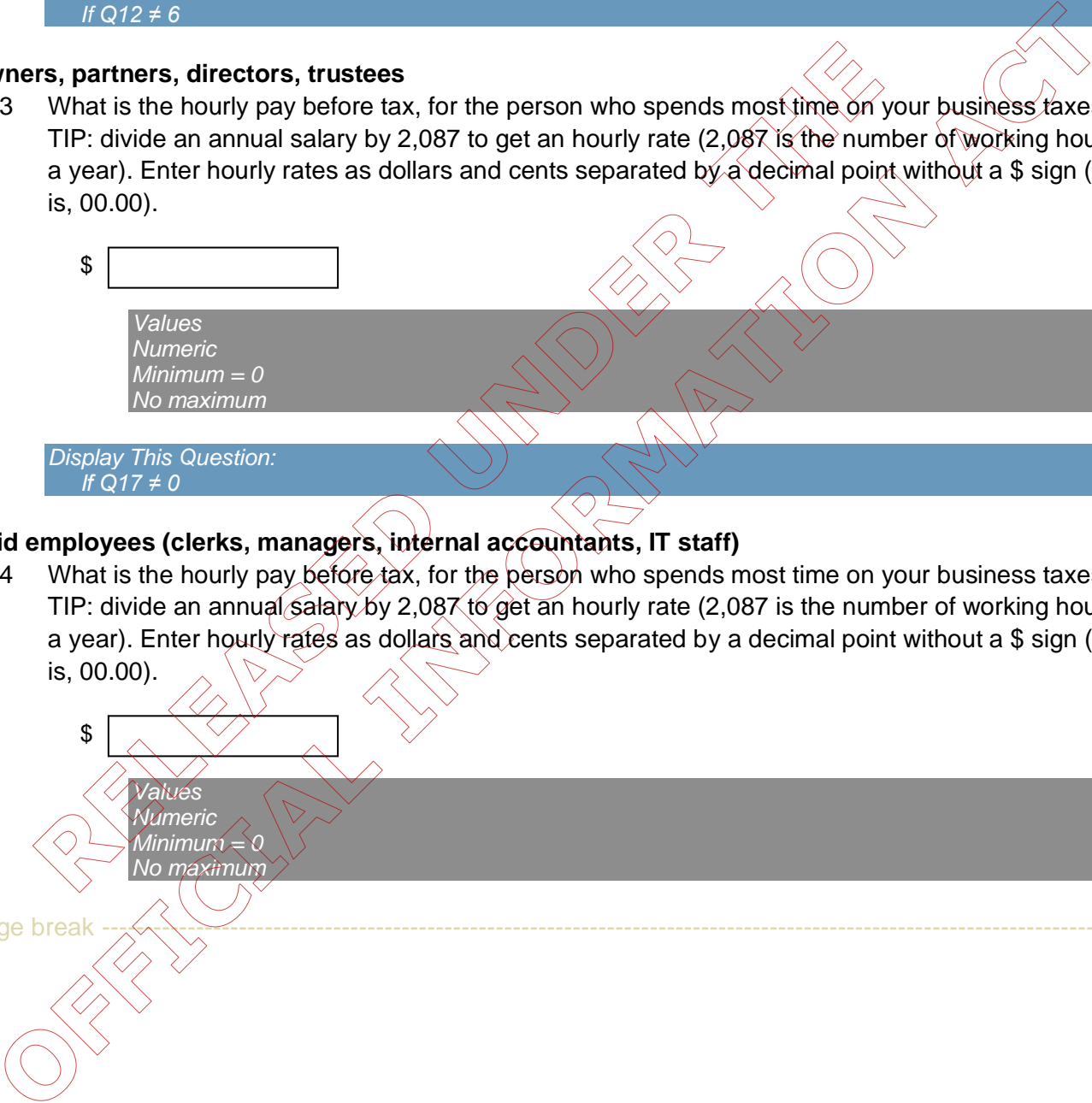
Paid employees (clerks, managers, internal accountants, IT staff)

Q54 What is the hourly pay before tax, for the person who spends most time on your business taxes?  
TIP: divide an annual salary by 2,087 to get an hourly rate (2,087 is the number of working hours in a year). Enter hourly rates as dollars and cents separated by a decimal point without a \$ sign (that is, 00.00).

\$

Values  
Numeric  
Minimum = 0  
No maximum

Page break -----



**COSTS OF EXTERNAL ADVICE block of questions**

Display This Question:  
If Q13 ≠ 5

**Q55 Costs of external advice and services**

The next questions about the cost of getting tax advice and services from parties outside of your business, such as accountants or tax agents.

How much has your business paid the following for tax advice and services over the last 12 months? *Please enter GST-inclusive amounts, using numbers without the \$ sign*

Display This Choice:  
If Q4 = 2

Accountant or bookkeeper

\$

Display This Choice:  
If Q4 = 3

Payroll service

\$

Display This Choice:  
If Q4 = 1

Tax agent or tax advisor

\$

Display This Choice:  
If Q4 = 4

Tax lawyer

\$

TOTAL

\$

Values:  
Numeric  
Minimum = 0  
No maximum

Page break -----

Display This Question:  
If Q12 ≠ 5

**Q56** Did your business pay for any one-off specialist tax advice in the last 12 months (e.g. for a change in business structure, requirements when exporting)?

- Yes
- No
- Not sure / don't know

Values:  
1 = Yes  
2 = No  
3 = Not sure/don't know

Page break -----

Display This Question:  
If Q56 = 1

Q57 Roughly, how much of the cost of this specialist tax advice or services was for each of the following taxes? Please enter GST-inclusive amounts, using numbers without the \$ sign. If you don't know exactly, give your best estimate.

GST	\$	<input type="text"/>
Income Tax (including Provisional Tax) - include the cost of annual accounts if they are mainly done for tax purposes	\$	<input type="text"/>
Fringe Benefit Tax (FBT)	\$	<input type="text"/>
PAYE (including Child Support, Student Loans, ACC earner levy but excluding ESCT)	\$	<input type="text"/>
KiwiSaver	\$	<input type="text"/>
Other taxes (e.g. RWT or Resident Withholding Tax)	\$	<input type="text"/>
<hr/>		
TOTAL	\$	<input type="text"/>

Values:  
Numeric  
Minimum = 0  
No maximum

Page break

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**TAX AUDIT block of questions**

**Q58 Tax audits**

Please be assured that your answers are kept private and confidential. Information you provide will only be used for research purposes.

Has your business had an Inland Revenue tax audit during the last 12 months?

- Yes
- No
- Not sure / don't know

Values:  
 1 = Yes  
 2 = No  
 3 = Not sure/don't know

Page break -----

Display This Question:  
 If Q58 = 1

**Q59** Please estimate the time spent within your business as a result of the tax audit (the hours you or your staff have spent interacting with Inland Revenue as part of the audit)

	Hours	Minutes
Time spent by you or your staff interacting with Inland Revenue as part of the audit	▼ Not applicable Not sure/ don't know (1 ... 250+)	▼ Not applicable ot sure / don't know (1 ... 59)

Values in Hours drop down boxes  
 888 = Not applicable  
 999 = Not sure/don't know  
 0 to 250 +

Values in Minutes drop down boxes  
 888 = Not applicable  
 999 = Not sure/don't know  
 0 to 59

Page break -----

Display This Question:  
 If Q58 = 1

**Q60** Please estimate the external costs of the tax audit to your business (e.g. fees paid to an accountant or lawyer to help you during the tax audit), excluding any change in tax liability or penalties. Please enter GST-inclusive amounts, using numbers without the \$ sign

\$

Values  
 Numeric  
 Minimum = 0  
 No maximum

Page break -----

COMPLIANCE PERCEPTIONS block of questions

Display This Question:  
If Q12 ≠ 5

Q61 What's affecting the time and costs of doing your business taxes?

Did anything happen in the last 12 months, for example a business expansion or closure, that meant the time and cost of doing your business taxes was unusually high or unusually low?

- Yes
- No
- Not sure / don't know

Values:  
1 = Yes  
2 = No  
3 = Not sure/don't know

Page break

Display This Question:  
If Q61 = 1

Q62 Please describe them briefly:

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Values:  
Alpha numeric free text

Page break

Display This Question:  
If Q12 ≠ 5

Q63 Overall during the last 12 months, other than the stress involved in finding the money, how stressful did you find meeting your business tax requirements?

- 1 = Not at all stressful
- 2
- 3
- 4 = Moderately stressful
- 5
- 6
- 7 = Extremely stressful

Values  
1 = Not at all stressful  
2 = 2  
3 = 3  
4 = Moderately stressful  
5 = 5  
6 = 6  
7 = Extremely stressful

Page break

Display This Question:  
If Q12 ≠ 5

Q64 Compared to the year before, do you think meeting your business' tax responsibilities is...

- 1 = Getting easier
- 2
- 3
- 4 = About the same
- 5
- 6
- 7 = Getting harder

Values  
1 = Getting easier  
2 = 2  
3 = 3  
4 = About the same  
5 = 5  
6 = 6  
7 = Getting harder

Page break

Display This Question:  
If Q64 >= 5

Q65 What is making it harder for your business to meet its tax responsibilities?

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Values:  
Alpha numeric free text

Display This Question:  
If Q64 <= 3

Q66 What is making it easier for your business to meet its tax responsibilities?

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Values:  
Alpha numeric free text

Page break

Display This Question:  
If Q12 ≠ 5

Q67 What difference has Inland Revenue made to the time and costs of doing your business taxes, over the last 12 months?

- 1 = Made it much easier
- 2
- 3
- 4 = Made no real difference
- 5
- 6
- 7 = Made it much harder

Values  
 1 = Made it much easier  
 2 = 2  
 3 = 3  
 4 = Made no real difference  
 5 = 5  
 6 = 6  
 7 = Made it much harder

Page break

Display This Question:  
If Q67 >= 5

Q68 In what ways has Inland Revenue made it harder?

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Values:  
 Alpha numeric free text

Display This Question:  
If Q67 <= 3

Q69 In what ways has Inland Revenue made it easier?

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Values:  
 Alpha numeric free text

Page break

Display This Question:  
If Q12 ≠ 6

Q70 How much do you personally agree or disagree with the following statements?

	Strongly agree	Slightly agree	Agree	Neutral	Slightly disagree	Disagree	Strongly disagree
My business is paying the right amount of tax	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other businesses are paying the right amount of tax	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The amount of time my business spends on tax matters is acceptable to me	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Values:  
1 = Strongly agree  
2 = Slightly agree  
3 = Agree  
4 = Neutral  
5 = Slightly disagree  
6 = Disagree  
7 = Strongly disagree

Page break -----

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**OTHER RULES & REGULATIONS block of questions**

**Q71 Complying with other rules & regulations**

Which of the following rules or regulations has your business had to comply with in the last 12 months?

- Food safety
- Local government
- Tax
- Transport safety
- Workplace health & safety
- None of these

Values:  
 1 = Food safety  
 2 = Local government  
 3 = Tax  
 4 = Transport safety  
 5 = Workplace health and safety  
 6 = None

Page break

Display This Question:  
 If Q71 ≠ 6

Carry Forward Selected Choices from "Q71"

**Q72** For each of the areas your business has dealt with, has the effort by your business increased or decreased compared to 12 months ago?

	Significantly increased	Increased	Slightly increased	No change	Slightly decreased	Decreased	Significantly decreased
Food safety	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Local government	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tax	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transport safety	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Workplace health & safety	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Values:  
 7 = Significantly increased  
 6 = Increased  
 5 = Slightly increased  
 4 = No change  
 3 = Slightly decreased  
 2 = Decreased  
 1 = Significantly decreased

Page break

**BUSINESS EXPERIENCE block of questions**

**Q73 Business experience**

About how many years' experience in total, do you have owning or managing any business?

- Less than 5 years
- 5-10 years
- 11-20 years
- More than 20 years
- Prefer not to say

Values  
 1 = Less than 5 years  
 2 = 5-10 years  
 3 = 11-20 years  
 4 = More than 20 years  
 5 = Prefer not to say

Page break

**Q74** How confident would you say you are when it comes to dealing with government-related matters?

- Not confident
- Moderately confident
- Very confident
- No opinion

Values  
 1 = Not confident  
 2 = Moderately confident  
 3 = Very confident  
 4 = No opinion

Page break

**Q80** Which of the following apply to your business?

- Totally or partly-owned by whānau, hapū, or iwi Māori
- Promotes Māori culture / tikanga
- Employs assets received from Treaty settlement claims
- Provide services for Māori
- None of these apply

Values:  
 1 = Totally or partly-owned by whānau, hapū, or iwi Māori  
 2 = Promotes Māori culture / tikanga  
 3 = Employs assets received from Treaty settlement claims  
 4 = Provide services for Māori  
 5 = None

Page break

**Q81** In your opinion, what's the situation that  $\{e://Field/BUSINESS\_NAME\}$  is in right now?

- Starting out / in start-up mode
- Surviving / in survival mode
- Actively growing
- Keeping about the same
- Getting the business ready for sale
- Winding up the business / getting ready to close down
- Not sure / don't know

Values:  
 1 = Starting out / in start-up mode  
 2 = Surviving / in survival mode  
 3 = Actively growing

4 = Keeping about the same  
5 = Getting the business ready for sale  
6 = Winding up the business / getting ready to close down  
7 = Not sure / don't know

Page break -----

Q75 If there are any other comments you'd like to make about the topic of this survey, please type them below.

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Values:  
Alpha numeric free text

Page break -----

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RESULTS SUMMARY block of questions

Display This Question:  
If Q12 ≠ 6

Q76 Results summary

Would you like to get a summary of how your industry compares to others, as a thank you for your time?

- Yes please!
- No thank you

Values:  
1 = Yes please!  
2 = No thank you

Page break

Display This Question:  
If Q76 = 1

Q77 Would you like your summary emailed to you, or do you want a hard copy sent to you by post?

- Email
- Hard copy sent by post

Values:  
1 = Email  
2 = Hard copy sent by post

Page break

Display This Question:  
If Q77 = 1

Q78 Which email address would you like it sent to?

- \${m:./Email1}
- Other email address (please type in)

Values:  
Valid email address

Page break

Display This Question:  
If Q77 = 2

Q79 Please enter the postal address you want it sent to.

Address line 1

Address line 2

City

Postal code

Page break

Thank You!

Your time and effort are sincerely appreciated. We'll be publishing the results on our website at

the end of the year. View earlier [compliance cost reports for small and medium enterprises](#). You can close your browser window now.

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# Bereavement survey May 2022

## Survey Flow

Block: Intro (12 Questions)

Page Break

Start of Block: Intro

Intro

Your feedback today will help Inland Revenue understand better ways to support customers during times of bereavement and loss.

Page Break

Q1

Have you been the executor of a will\*, or responsible for or involved in managing the final affairs of a relative, friend, or associate?

*\*an executor of a will is the person named to carry out the wishes of the deceased after they pass away. When someone dies with a legally valid will, the state approves the named executor to act on it. This could include paying outstanding debts, distributing money and/or property, and more.*

- Yes (1)
- No (2)
- Don't know (4)

Page Break

Display This Question:

If Have you been the executor of a will\*, or responsible for or involved in managing the final affai... =  
Yes

Q2

What was the most recent role you performed?

- Executor (1)
- Supporting the executor (2)
- Professional capacity (e.g., Lawyer for the deceased or beneficiary) (3)
- Representing family, or friends, or associates, or beneficiaries of the deceased (4)
- Supporting family, or friends, or associates, or beneficiaries of the deceased (5)
- Witness (e.g., signing a legal document as a witness, or appearing as a witness during a legal matter relating to a will or estate) (6)
- Other (please specify) (7)

\_\_\_\_\_

Page Break

Display This Question:

If Have you been the executor of a will\*, or responsible for or involved in managing the final affai... = Yes

Q3

How long ago did you perform that role?

- Within the last two years (1)
- 3 to 5 years ago (2)
- 5 to 10 years ago (3)
- Longer than 10 years ago (4)
- Don't Know (5)

---

Page Break

Display This Question:

If Have you been the executor of a will\*, or responsible for or involved in managing the final affai... = Yes

Q4

What was your relationship to the person who passed away?

- Family member (1)
  - Friend (2)
  - Associate (3)
  - Rather not say (5)
  - Other (please specify) (4)
- 

---

Page Break

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Display This Question:

If Have you been the executor of a will\*, or responsible for or involved in managing the final affai... =  
Yes

Q5

Can you tell us about any experience you've had with Inland Revenue when finalising the tax affairs for a relative, friend or associate?

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Page Break

Q6

In your opinion, what is an acceptable length of time after a person passes away before Inland Revenue contacts the executors and/or family to begin finalising their tax affairs?

- Less than 1 month (1)
- 1 to 2 months (2)
- 3 to 4 months (3)
- 5 to 6 months (4)
- 6 months or more (6)

Page Break

Q7

If a deceased person's tax affairs are straight forward, how long do you think it should take Inland Revenue to finalise that person's tax affairs once contact has been made with the executor and/or the family?

- Less than 1 month after Inland Revenue starts their process (1)
- 1 to 2 months (2)
- 3 to 4 months (3)
- 5 to 6 months (4)
- 6 months or more (6)

---

Page Break

Q8

In your opinion, what communication methods would be most preferred for Inland Revenue to contact the deceased persons' executor and/or family? (Please select all that apply)

- Phone Call (1)
  - Email (2)
  - Letter (3)
  - myIR account (4)
  - Face-to-face (5)
  - Third Party Agent (6)
  - Other (please specify) (7)
-



Page Break

Q9

Given your own background and experiences, is there anything you think Inland Revenue needs to consider when dealing with family members, friends or loved ones of those who have passed?

Yes (1)

No (2)

Page Break

*Display This Question:*

*If Given your own background and experiences, is there anything you think Inland Revenue needs to co... = Yes*

Q10

What is it you think we should consider?

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Page Break

*Display This Question:*

*If Ethnicity Indicator != Yes*

*And Ethnicity Indicator != Prefer not to say*

Q11

What ethnicity do you associate yourself with?

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(Please select all that apply)

- New Zealand European (1)
- Māori (2)
- Samoan (3)
- Cook Island Māori (4)
- Tongan (5)
- Niuean (6)
- Australian (7)
- Chinese (8)
- Indian (9)
- Another Pacific group (please tell us) (10)

---

Another Asian group (please tell us) (11)

---

Another European group (please tell us) (14)

---

A group not mentioned above (please tell us) (12)

---

Prefer not to say (13)

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Page Break

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End of Block: Intro

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# Community Seminar Evaluation

We are interested in hearing about your experience at the recent webinar/seminar/workshop you attended. **Your feedback is important**, and will help us maintain and improve the quality of our service.

This should take about 5 minutes to complete.

1 Did you attend an in-person seminar/workshop or an online webinar?

- seminar/workshop (1)
- webinar (2)

*Display This Question:*

*If We are interested in hearing about your experience at the recent webinar/seminar/workshop you att... = seminar/workshop*

2 What  $\{Q32/ChoiceGroup/SelectedChoices\}$  are you providing feedback on?

- Introduction to business (1)
  - GST workshop (2)
  - Employers workshop (3)
  - IR3 completion workshop (4)
  - Other (please tell us what it was (5))
-

Display This Question:

If We are interested in hearing about your experience at the recent webinar/seminar/workshop you att... = webinar

Q33

2 What  $\{Q32/ChoiceGroup/SelectedChoices\}$  are you providing feedback on?

- Introduction to business (1)
  - GST (2)
  - Employers (3)
  - IR3 completion (4)
  - Other (please tell us what it was) (5)
- 

**Date of Attendance:**

Date of attendance:

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*Display This Question:*

*If We are interested in hearing about your experience at the recent webinar/seminar/workshop you att... = seminar/workshop*

Seminar/workshop location:

- Northland (1)
- Auckland (2)
- Waikato (3)
- Bay of Plenty (4)
- Gisborne (5)
- Taranaki (6)
- Manawatu-Whanganui (7)
- Hawke's bay (8)
- Wellington (9)
- Nelson-Tasman (10)
- Marlborough (11)
- West Coast (12)
- Canterbury (13)
- Otago (14)
- Southland (15)

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Display This Question:

If Seminar/workshop location: = Auckland

And We are interested in hearing about your experience at the recent webinar/seminar/workshop you att... = seminar/workshop

Venue

- Takapuna (1)
- Manukau (2)
- Central Auckland (3)
- Henderson (4)
- West Harbour (5)

Display This Question:

If Seminar/workshop location: = Waikato

Venue

- Hamilton (1)
- Taupo (2)
- Tokoroa (3)

Display This Question:

If Seminar/workshop location: = Bay of Plenty

Venue

- Tauranga (1)
- Rotoroua (2)
- Whakatane (3)



Display This Question:

If Seminar/workshop location: = Manawatu-Whanganui

Venue

- Whanganui (1)
- Palmerston North (2)
- Dannevirke (3)
- Pahiatua (4)

Display This Question:

If Seminar/workshop location: = Wellington

Venue

- Porirua (1)
- Masterton (2)
- Wellington (3)
- Paraparaumu (4)
- Seaview (5)

Display This Question:

If Seminar/workshop location: = Nelson-Tasman

Venue

- Nelson (1)
- Golden Bay (2)

Display This Question:

If Seminar/workshop location: = West Coast

Venue

- Greymouth (1)
- Hokitika (2)
- Westport (3)

Display This Question:

If Seminar/workshop location: = Canterbury

Venue

- Christchurch (1)
- Timaru (2)
- Ashburton (3)

Display This Question:

If Seminar/workshop location: = Otago

Venue

- Dunedin (1)
- Queenstown (2)
- Wanaka (3)
- Alexandra (4)
- Oamaru (5)

Display This Question:  
 If Seminar/workshop location: = Southland

Venue

- Invercargill (1)
- Te Anau (2)

3.  $\{Q32/ChoiceGroup/SelectedChoices\}$  content

Thinking about the content of the  $\{Q32/ChoiceGroup/SelectedChoices\}$  you attended, please read each statement carefully, and decide how strongly you agree or disagree with each one. (Please select the answer that applies)

	Strongly disagree (1)	Disagree (2)	Somewhat disagree (7)	Neutral (3)	Somewhat agree (6)	Agree (4)	Strongly agree (5)
There was enough time to cover the content (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The visuals were clear and easy to understand (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I learnt a lot from the webinar/seminar/workshop (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The presenter was knowledgeable (4)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The presenter was well-prepared (5)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Page Break

4 Delivery

Thinking about the presentation of the  $\{Q32/ChoiceGroup/SelectedChoices\}$  you attended, please read each statement carefully, and decide how strongly you agree or disagree with each one. (Please select the answer that applies)

	Strongly disagree (1)	Disagree (2)	Somewhat disagree (7)	Neutral (3)	Somewhat agree (6)	Agree (4)	Strongly agree (5)
The presenter checked we understood the information provided (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We were encouraged to ask questions (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The presenter gave informative answers (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The presenter was knowledgeable (4)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The presenter was well-prepared (5)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Page Break

5 Your experience

Thinking about your understanding of the information presented, should we:

▼ Make it easier to understand (1) ... Make it more challenging (3)

---

6 Overall

How satisfied were you with the overall quality of the [\\${Q32/ChoiceGroup/SelectedChoices}](#)?

- Very satisfied (5)
- Satisfied (7)
- Somewhat satisfied (4)
- Neutral (3)
- Somewhat dissatisfied (2)
- Dissatisfied (6)
- Very dissatisfied (1)

7 How did the [\\${Q32/ChoiceGroup/SelectedChoices}](#) compare to what you expected?

- Much worse than expected (1)
  - Worse than expected (2)
  - Same as expected (3)
  - Better than expected (4)
  - Much better than expected (5)
-

8 Would you recommend this  $\{Q32/ChoiceGroup/SelectedChoices\}$  to others?

- Yes (1)
- Maybe (2)
- No (3)
- Don't know (4)

9 What one thing would you change to improve the  $\{Q32/ChoiceGroup/SelectedChoices\}$ ?

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---

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---

---

Finally, please tell us a little bit about yourself.

10 What age group do you belong to?

- Under 20
- 20-29
- 30-39
- 40-49
- 50-59
- 60+

11 Gender

▼ Male (1) Female (2)... Gender diverse (3)

12 Are you:

- An advisor (1)
  - A business owner (2)
  - An employee (3)
  - Finance/Accounts person (4)
  - From a community group (5)
  - From a government agency (6)
  - A new resident in New Zealand (7)
  - A primary caregiver (8)
  - A tertiary student (9)
  - A high school student (10)
  - Thinking about starting a new business (11)
  - Tax agent (12)
  - Other (please tell us) (13)
- 

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*Display This Question:*

*If 12 Are you: = An advisor*

Please tell us how many years' experience you have as an advisor.

- Less than 1 year
- 1 - 2 years
- 2 - 5 years
- 5 - 10 years
- More than 10 years

---

*Display This Question:*

*If 12 Are you: = A business owner*

Please tell us how many years' experience you have as a business owner.

- Less than 1 year
- 1 - 2 years
- 2 - 5 years
- 5 - 10 years
- More than 10 years

---

*Display This Question:*

*If 12 Are you: = Finance/Accounts person*

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Please tell us how many years' experience you have as a finance/accounts person.

- Less than 1 year
- 1 - 2 years
- 2 - 5 years
- 5 - 10 years
- More than 10 years

---

*Display This Question:*

*If 12 Are you: = Tax agent*

Please tell us how many years' experience you have as a tax agent

- Less than 1 year
- 1 - 2 years
- 2 - 5 years
- 5 - 10 years
- More than 10 years

---

*Display This Question:*

*If 12 Are you: = Thinking about starting a new business*

Will this be your first business, or have you owned businesses previously?

- First business (1)
- Have owned another business previously (2)

13 Which industry do you work in?

- I am not currently employed
  - Agriculture, Forestry & Fishing
  - Mining
  - Manufacturing
  - Electricity, Gas, Water & Waste Services
  - Construction
  - Information & Telecommunications
  - Financial & Insurance Services
  - Property or Business Services
  - Government
  - Education
  - Health & Community Services
  - Wholesale or Retail Trade
  - Hospitality - Accommodation or Cafes and Restaurants
  - Transport & Storage
  - Cultural & Recreation Services
  - Personal services (i.e. gardener, hairdresser, etc.)
  - Non Profit Sector
- 

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14 And lastly, how did you hear about the \${Q32/ChoiceGroup/SelectedChoices}?

- From an IR website (1)
  - From an IR mail-out (2)
  - IR Contact Centre / 0800 number (3)
  - From an IR email (4)
  - From an IR staff member (5)
  - From another website (6)
  - Google search (7)
  - From my employer (8)
  - From a Tax Agent / Accountant (9)
  - IR flyer / pamphlet (10)
  - From a colleague or friend (11)
  - Word of mouth (12)
  - Other Government agency (13)
  - Other - How did you find out? (14)
- 

End of Block: Block 4

---

# CS questions for CX&P - V2

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## Start of Block: Intro and payments

### Intro

Thanks for taking the time to share your feedback today.

To begin, we'd like to understand more about your experiences with Child Support.

---

Page Break

*Display This Question:*

*If FAM Group = CPR*

*Or FAM Group = PCC and CPR*

Q1 Since November 2021, have you received any Child Support payments?

Yes (1)

No (2)

---

Page Break

*Display This Question:*

*If Since November 2021, have you received any Child Support payments? = Yes*

Q2 Do you feel your Child Support payments are coming through...?

Faster than they were before November 2021 (1)

Same (2)

Slower than they were before November 2021 (3)

Don't know (0)

End of Block: Intro and payments

---

Start of Block: myIR EX

Q3 Thinking about all your Child Support interactions with Inland Revenue (IR) **this year**, have you done any of the following tasks?

Please select all that apply.

- Checked myIR after getting an alert from IR (1)
  - Applied for Child Support (2)
  - Changed something about your Child Support arrangement (3)
  - Made a Child Support payment (4)
  - Checked Working for Families and Child Support (5)
  - Looked for information – e.g., payment dates/amounts (6)
  - Cancelled the Child Support you were receiving (7)
  - Waived an amount of money owed to you (8)
  - Lodged an objection about your Child Support (9)
  - Changed care arrangement for a child/ren (10)
  - Browsed the Child Support section of myIR (11)
  - Something else (please tell us) (12)
- 

- None of the above (0)

*Skip To: Q10 If Thinking about all your Child Support interactions with Inland Revenue (IR) this year, have you d... = None of the above*

Page Break

---

Display This Question:

If Thinking about all your Child Support interactions with Inland Revenue (IR) this year, have you d...  
!= None of the above

**Q4 How did you interact with Inland Revenue for these tasks?**

Please select all that apply.

Display This Choice:

If Thinking about all your Child Support interactions with Inland Revenue (IR) this year, have you d...  
= Checked myIR after getting an alert from IR

Display This Choice:

If Thinking about all your Child Support interactions with Inland Revenue (IR) this year, have you d...  
= Applied for Child Support

Display This Choice:

If Thinking about all your Child Support interactions with Inland Revenue (IR) this year, have you d...  
= Changed something about your Child Support arrangement

Display This Choice:

If Thinking about all your Child Support interactions with Inland Revenue (IR) this year, have you d...  
= Made a Child Support payment

Display This Choice:

If Thinking about all your Child Support interactions with Inland Revenue (IR) this year, have you d...  
= Checked Working for Families and Child Support

Display This Choice:

If Thinking about all your Child Support interactions with Inland Revenue (IR) this year, have you d...  
= Looked for information – e.g., payment dates/amounts

Display This Choice:

If Thinking about all your Child Support interactions with Inland Revenue (IR) this year, have you d...  
= Cancelled the Child Support you were receiving

Display This Choice:

If Thinking about all your Child Support interactions with Inland Revenue (IR) this year, have you d...  
= Waived an amount of money owed to you

Display This Choice:

If Thinking about all your Child Support interactions with Inland Revenue (IR) this year, have you d...  
= Lodged an objection about your Child Support

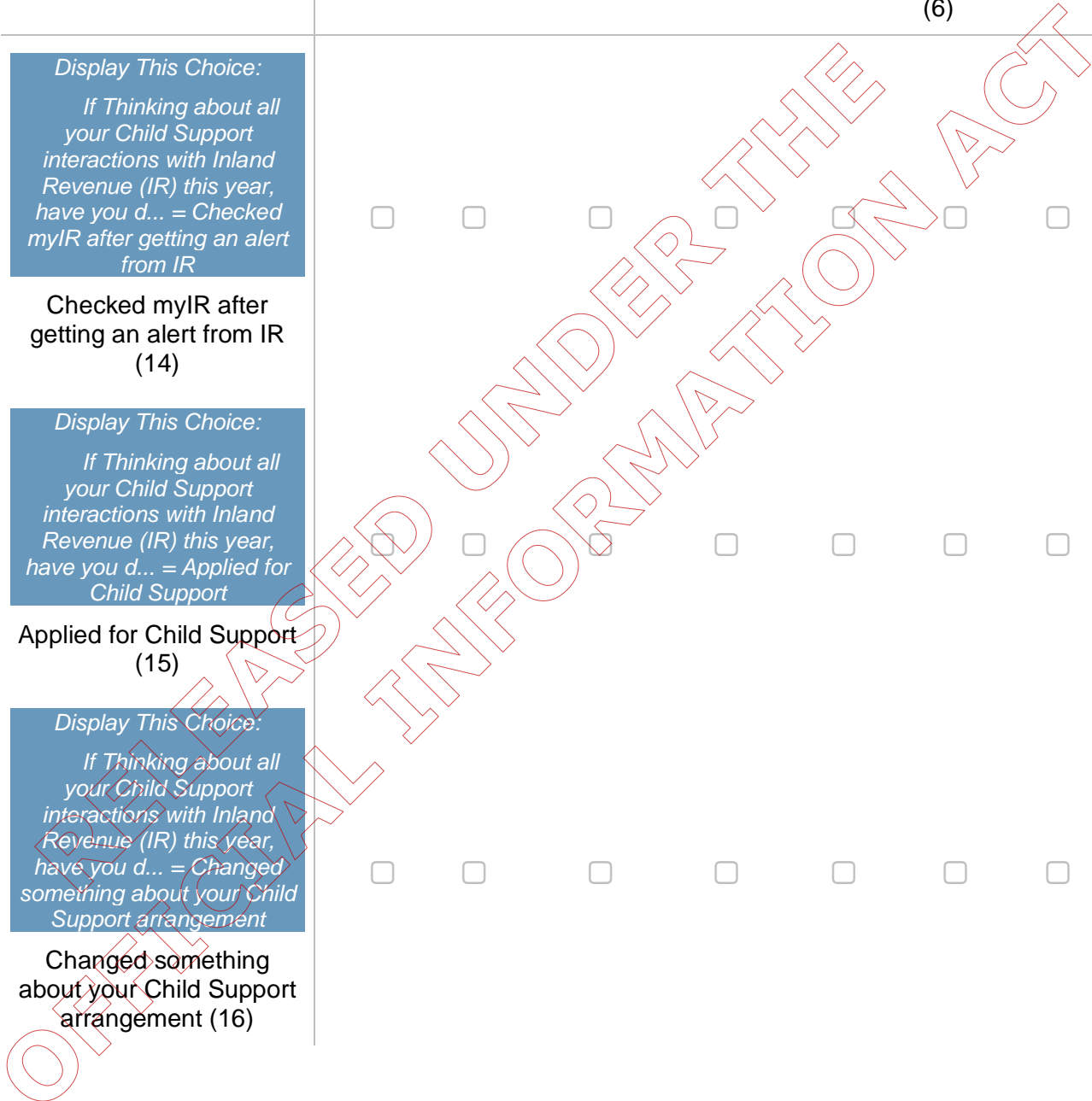
Display This Choice:

If Thinking about all your Child Support interactions with Inland Revenue (IR) this year, have you d...  
= Changed care arrangement for a child/ren

Display This Choice:

If Thinking about all your Child Support interactions with Inland Revenue (IR) this year, have you d...  
= Something else (please tell us)

	Used myIR (1)	Phoned IR (2)	Sent IR a message in myIR (3)	Visited IR's website (4)	Visited an IR office (5)	Sent IR a letter in the post (6)	Can't recall (0)
<p><i>Display This Choice:</i>                      If Thinking about all your Child Support interactions with Inland Revenue (IR) this year, have you d... = Checked myIR after getting an alert from IR</p> <p>Checked myIR after getting an alert from IR (14)</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p><i>Display This Choice:</i>                      If Thinking about all your Child Support interactions with Inland Revenue (IR) this year, have you d... = Applied for Child Support</p> <p>Applied for Child Support (15)</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p><i>Display This Choice:</i>                      If Thinking about all your Child Support interactions with Inland Revenue (IR) this year, have you d... = Changed something about your Child Support arrangement</p> <p>Changed something about your Child Support arrangement (16)</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



*Display This Choice:*  
*If Thinking about all your Child Support interactions with Inland Revenue (IR) this year, have you d... = Made a Child Support payment*

**Made a Child Support payment (17)**

*Display This Choice:*  
*If Thinking about all your Child Support interactions with Inland Revenue (IR) this year, have you d... = Checked Working for Families and Child Support*

**Checked Working for Families and Child Support (18)**

*Display This Choice:*  
*If Thinking about all your Child Support interactions with Inland Revenue (IR) this year, have you d... = Looked for information – e.g., payment dates/amounts*

**Looked for information – e.g., payment dates/amounts (19)**

*Display This Choice:*  
*If Thinking about all your Child Support interactions with Inland Revenue (IR) this year, have you d... = Cancelled the Child Support you were receiving*

**Cancelled the Child Support you were receiving (20)**





*Display This Choice:*  
*If Thinking about all your Child Support interactions with Inland Revenue (IR) this year, have you d... = Waived an amount of money owed to you*

**Waived an amount of money owed to you (21)**

*Display This Choice:*  
*If Thinking about all your Child Support interactions with Inland Revenue (IR) this year, have you d... = Lodged an objection about your Child Support*

**Lodged an objection about your Child Support (22)**

*Display This Choice:*  
*If Thinking about all your Child Support interactions with Inland Revenue (IR) this year, have you d... = Changed care arrangement for a child/ren*

**Changed care arrangement for a child/ren (23)**

*Display This Choice:*  
*If Thinking about all your Child Support interactions with Inland Revenue (IR) this year, have you d... = Something else (please tell us)*

**Something else (25)**

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Display This Question:

If How did you interact with Inland Revenue for these tasks? Please select all that apply. = Used myIR

RELEASED UNDER THE  
OFFICIAL INFORMATION ACT

Q5 You said that you used myIR for the below Child Support tasks. Which of these were you able to successfully complete yourself in myIR?  
Please select all that apply.

Display This Choice:

If How did you interact with Inland Revenue for these tasks? Please select all that apply. = Checked myIR after getting an alert from IR [ Used myIR ]

- Checked myIR after getting an alert from IR (1)

Display This Choice:

If How did you interact with Inland Revenue for these tasks? Please select all that apply. = Applied for Child Support [ Used myIR ]

- Applied for Child Support (2)

Display This Choice:

If How did you interact with Inland Revenue for these tasks? Please select all that apply. = Changed something about your Child Support arrangement [ Used myIR ]

- Changed something about your Child Support arrangement (3)

Display This Choice:

If How did you interact with Inland Revenue for these tasks? Please select all that apply. = Made a Child Support payment [ Used myIR ]

- Made a Child Support payment (4)

Display This Choice:

If How did you interact with Inland Revenue for these tasks? Please select all that apply. = Checked Working for Families and Child Support [ Used myIR ]

- Checked Working for Families and Child Support (5)

Display This Choice:

If How did you interact with Inland Revenue for these tasks? Please select all that apply. = Looked for information – e.g., payment dates/amounts [ Used myIR ]

- Looked for information – e.g., payment dates/amounts (6)

Display This Choice:

If How did you interact with Inland Revenue for these tasks? Please select all that apply. = Cancelled the Child Support you were receiving [ Used myIR ]

- Cancelled the Child Support you were receiving (7)

Display This Choice:

If How did you interact with Inland Revenue for these tasks? Please select all that apply. = Waived an amount of money owed to you [ Used myIR ]

- Waived an amount of money owed to you (8)

Display This Choice:

If How did you interact with Inland Revenue for these tasks? Please select all that apply. = Lodged an objection about your Child Support [ Used myIR ]

- Lodged an objection about your Child Support (9)

Display This Choice:

If How did you interact with Inland Revenue for these tasks? Please select all that apply. = Changed care arrangement for a child/ren [ Used myIR ]

- Changed care arrangement for a child/ren (10)

Display This Choice:

If How did you interact with Inland Revenue for these tasks? Please select all that apply. = Something else [ Used myIR ]

- Something else (11)
- I wasn't able to complete any of these tasks in myIR (0)

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Page Break

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Display This Question:

If You said that you used myIR for the below Child Support tasks. Which of these were you able to su... = I wasn't able to complete any of these tasks in myIR

Or If

You said that you used myIR for the below Child Support tasks. Which of these were you able to su... , Checked myIR after getting an alert from IR Is Displayed

And You said that you used myIR for the below Child Support tasks. Which of these were you able to su... != Checked myIR after getting an alert from IR

Or If

You said that you used myIR for the below Child Support tasks. Which of these were you able to su... , Applied for Child Support Is Displayed

And You said that you used myIR for the below Child Support tasks. Which of these were you able to su... != Applied for Child Support

Or If

You said that you used myIR for the below Child Support tasks. Which of these were you able to su... , Changed something about your Child Support arrangement Is Displayed

And You said that you used myIR for the below Child Support tasks. Which of these were you able to su... != Changed something about your Child Support arrangement

Or If

You said that you used myIR for the below Child Support tasks. Which of these were you able to su... , Made a Child Support payment Is Displayed

And You said that you used myIR for the below Child Support tasks. Which of these were you able to su... != Made a Child Support payment

Or If

You said that you used myIR for the below Child Support tasks. Which of these were you able to su... , Checked Working for Families and Child Support Is Displayed

And You said that you used myIR for the below Child Support tasks. Which of these were you able to su... != Checked Working for Families and Child Support

Or If

You said that you used myIR for the below Child Support tasks. Which of these were you able to su... , Looked for information – e.g., payment dates/amounts Is Displayed

And You said that you used myIR for the below Child Support tasks. Which of these were you able to su... != Looked for information – e.g., payment dates/amounts

Or If

You said that you used myIR for the below Child Support tasks. Which of these were you able to su... , Cancelled the Child Support you were receiving Is Displayed

And You said that you used myIR for the below Child Support tasks. Which of these were you able to su... != Cancelled the Child Support you were receiving

Or If

You said that you used myIR for the below Child Support tasks. Which of these were you able to su... , Waived an amount of money owed to you Is Displayed

And You said that you used myIR for the below Child Support tasks. Which of these were you able to su... != Waived an amount of money owed to you

Or If

You said that you used myIR for the below Child Support tasks. Which of these were you able to successfully do yourself?  
, Lodged an objection about your Child Support Is Displayed

And You said that you used myIR for the below Child Support tasks. Which of these were you able to successfully do yourself?  
!= Lodged an objection about your Child Support

Or If

You said that you used myIR for the below Child Support tasks. Which of these were you able to successfully do yourself?  
, Changed care arrangement for a child/ren Is Displayed

And You said that you used myIR for the below Child Support tasks. Which of these were you able to successfully do yourself?  
!= Changed care arrangement for a child/ren

Or If

You said that you used myIR for the below Child Support tasks. Which of these were you able to successfully do yourself?  
, Something else Is Displayed

And You said that you used myIR for the below Child Support tasks. Which of these were you able to successfully do yourself?  
!= Something else

Q6 What changes would you need made to myIR for you to be able to successfully do these things yourself?

Please be as detailed as possible.

---

Page Break

Display This Question:

If Thinking about all your Child Support interactions with Inland Revenue (IR) this year, have you done any of the following?  
= Browsed the Child Support section of myIR

Or How did you interact with Inland Revenue for these tasks? Please select all that apply. = Used myIR

Q7 When you've used myIR for your Child Support this year, have you found it easier or more difficult compared to times you used it **last year**?

- Easier than it was last year (1)
- Same (2)
- More difficult than it was last year (3)
- Don't know (0)

---

Page Break

Display This Question:

If When you've used myIR for your Child Support this year, have you found it easier or more difficul...  
= More difficult than it was last year



Q8 When using myIR for your Child Support, what things did you find difficult?  
Please select all that apply.

- Understanding the language IR used (1)
  - Finding my way around myIR (2)
  - Too many clicks to get where I wanted (3)
  - myIR did not give me all the information I needed (4)
  - Search tool was not helpful (5)
  - Process was not easy to understand (6)
  - I'm not familiar with myIR (7)
  - Information was not all in one place (8)
  - Instructions were not clear (9)
  - Updating my details (10)
  - Understanding the financial details for my Child Support situation (11)
  - Changing what I had done previously (12)
  - Saving what I had done (13)
  - Knowing I had done things correctly (14)
  - Finding out what happens next (15)
  - Something else (please tell us) (16)
- 
- Can't recall (0)

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Page Break



Display This Question:

If When you've used myIR for your Child Support this year, have you found it easier or more difficul...  
= Easier than it was last year

Q9 When using myIR for your Child Support, what things did you find easy?  
Please select all that apply.

- Understanding the language IR used (1)
  - Finding my way around myIR (2)
  - Not too many clicks to get where I wanted (3)
  - myIR gave me all the information I needed (4)
  - Search tool was helpful (5)
  - Process was easy to understand (6)
  - I'm familiar with myIR (7)
  - Information was all in one place (8)
  - Instructions were clear (9)
  - Updating my details (10)
  - Understanding the financial details for my Child Support situation (11)
  - Changing what I had done previously (12)
  - Saving what I had done (13)
  - Knowing I had done things correctly (14)
  - Finding out what happens next (15)
  - Something else (please tell us) (16)
- 
- Can't recall (0)

Page Break

Q10 What, if anything, would need to change to make your current Child Support arrangements work better for you and your children?  
Please be as detailed as possible.

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End of Block: myIR EX

Start of Block: IITA

Q11 Finally, the last few questions are about your income tax assessment experience this year.

Did you file an individual income tax return or receive an individual income tax assessment for the tax year ended 31 March 2022?

- Yes (1)
- No (2)
- Can't recall (0)

Page Break

Display This Question:

If Finally, the last few questions are about your income tax assessment experience this year. Did yo...  
= Yes

Q12 Was your income tax assessment experience this year better or worse than the year before?

- Better than the year before (1)
- The same as the year before (2)
- Worse than the year before (3)
- Didn't file an income tax return or get an income tax assessment the year before (0)

Page Break

Display This Question:

*If Was your income tax assessment experience this year better or worse than the year before? = Better than the year before*

Q13a Please tell us why your income tax assessment experience this year was better than last year?

Please be as detailed as possible.

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Page Break

Display This Question:

*If Was your income tax assessment experience this year better or worse than the year before? = Worse than the year before*

Q13b Please tell us why your income tax assessment experience this year was worse than last year?

Please be as detailed as possible.

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Page Break

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Q14 Thanks for your feedback today, we really appreciate your contributions through IR Connection.

In the future, what topics would you like to provide more feedback on?

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End of Block: IITA

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# Cust Perceptions - WFF Debt survey

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## Start of Block: Intro & Payment frequency

Working for Families tax credits are an annual entitlement for families with dependent children aged 18 and under to help with the cost of raising a family. The different ways a customer can receive their annual WfFTC entitlement are:

**Weekly or fortnightly payments** throughout the year – the annual entitlement is calculated at the start of the year based on a family's **estimated** annual income. It is then divided and paid as either 52 weekly or 26 fortnightly payments, or

**A lump-sum payment** at the end of the year - the annual entitlement is calculated off the family's **actual** annual income at the end of the year and is paid as one lump-sum.

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Page Break

Q1 Which of the following would be your **most preferred** way to receive your WfFTC entitlement?

- Weekly payments (8)
  - Fortnightly payments (9)
  - An end-of-year lump-sum payment (10)
  - Other (please specify) (11)
- 

---

*Display This Question:*

*If Which of the following would be your most preferred way to receive your WfFTC entitlement? = Weekly payments*

*Or Which of the following would be your most preferred way to receive your WfFTC entitlement? = Fortnightly payments*

*Or Which of the following would be your most preferred way to receive your WfFTC entitlement? = An end-of-year lump-sum payment*

*Or Or Which of the following would be your most preferred way to receive your WfFTC entitlement? Text Response Is Not Empty*

Q2 Why is this your most preferred way to receive your WfFTC?

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End of Block: Intro & Payment frequency

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Start of Block: WFF debt customers

Q3 Each customer's WfFTC entitlement for the year is confirmed through an end-of-year assessment. This could result in a WfFTC debt if a customer received more WfFTC than they were entitled to throughout the year.

Have you ever had a WfFTC debt?

- Yes (1)
- No (2)
- Unsure (3)

Skip To: End of Block If Each customer's WfFTC entitlement for the year is confirmed through an end-of-year assessment. Th... ! = Yes

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Page Break

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Q4 Thinking about your most recent WfFTC debt, which of the following best describes why you got the debt?

(Please select all that apply)

- The annual income estimate was too low (E.g., you received more income than what you expected or some of your income wasn't included in your estimate). (4)
  - The childcare you provided changed during the year (E.g., a child left your care or your proportion of shared care reduced). (5)
  - Your relationship status changed during the year (E.g., your relationship ended or a new one began). (6)
  - Your employment situation changed during the year (E.g., the number of hours you worked changed or you became self-employed). (7)
  - You don't know why you got a WfFTC debt (8)
  - Another reason (please specify) (9)
- 

Page Break

Q5 Which of the following best describes how your most recent WfFTC debt was resolved?

(Please select all that apply)

- You repaid it in full with one lump-sum payment. (4)
  - You repaid it via multiple, smaller payments over a period of time. (5)
  - Inland Revenue repaid some or all of the debt using a tax refund you had (E.g., income tax or GST refund). (6)
  - Some or all of the debt was written-off by Inland Revenue. (7)
  - Some of the debt is still outstanding. (8)
  - All of the debt is still outstanding. (9)
  - I can't recall how the debt was resolved. (10)
  - Other (please specify) (11)
- 

Page Break

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Q6 Overall, how easy or difficult did you find interacting with Inland Revenue about your most recent WffTC debt?

- Extremely easy (12)
- Easy (13)
- Somewhat easy (14)
- Neither easy nor difficult (15)
- Somewhat difficult (16)
- Difficult (17)
- Extremely difficult (18)
- I didn't interact with Inland Revenue to resolve my debt (19)

*Skip To: End of Block If Overall, how easy or difficult did you find interacting with Inland Revenue about your most recen... = I didn't interact with Inland Revenue to resolve my debt*

Page Break

Q7 For what reason was your interaction with Inland Revenue  
\${Q6/ChoiceGroup/SelectedChoices}?

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End of Block: WFF debt customers

Start of Block: WFF debt general

Q8 Have you ever done any of the following to avoid getting a WfFTC debt?

(Please select all that apply)

- Overestimated your annual family income to reduce your payments through the year. (4)
  - Chose to receive your WfFTC as a lump-sum payment at the end of the tax year instead of weekly or fortnightly payments through the year. (5)
  - Delayed or did not apply at all for WfFTC. (6)
  - Turned down employment opportunities or extra work. (7)
  - You have not done anything specific to avoid a WfFTC debt. (9)
  - Something else (please specify) (8)
- 

Page Break

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Q9 Like income tax debt, WfFTC debt has a due date for repayment. If it is paid late, penalties and interest may be applied to the debt.

Were you aware of this?

- Yes (4)
  - No (5)
  - Unsure (6)
-

Display This Question:

If Like income tax debt, WfFTC debt has a due date for repayment. If it is paid late, penalties and... = Yes

Or Like income tax debt, WfFTC debt has a due date for repayment. If it is paid late, penalties and... = No

Or Like income tax debt, WfFTC debt has a due date for repayment. If it is paid late, penalties and... = Unsure

Q10 How fair or unfair do you think it is that WfFTC debt is treated the same as income tax debt?

- Extremely unfair (4)
- Unfair (5)
- Somewhat unfair (6)
- Neither fair nor unfair (7)
- Somewhat fair (8)
- Fair (9)
- Extremely fair (10)

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Page Break

Q11 Why do you think it is  $\{Q10/ChoiceGroup/SelectedChoices\}$  that income tax debt and WfFTC debt are treated the same way?

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Page Break

Q12 One repayment option for WfFTC debt is through an instalment arrangement where you use your current weekly or fortnightly WfFTC payments to pay off your debt.

For example, last year you received a \$200 WfFTC debt. Your current WfFTC payments for this year are \$100 per week. For the next 10 weeks, you choose to reduce your weekly payments to \$80 and have the remaining \$20 automatically put towards paying off your debt.

How likely would you be to use this repayment option for any future WfFTC debt that may arise?

- Extremely likely (4)
- Likely (5)
- Somewhat likely (6)
- Neutral (7)
- Somewhat unlikely (8)
- Unlikely (9)
- Extremely unlikely (10)

---

Page Break

Display This Question:

If One repayment option for WfFTC debt is through an instalment arrangement where you use your curre... = Somewhat unlikely

Or One repayment option for WfFTC debt is through an instalment arrangement where you use your curre... = Unlikely

Or One repayment option for WfFTC debt is through an instalment arrangement where you use your curre... = Extremely unlikely

Q13 Please tell us why you would be  $\{Q12/ChoiceGroup/SelectedChoices\}$  to use this as a repayment option?

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End of Block: WFF debt general

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Start of Block: Income estimations

Q14 When estimating your family's annual income for WfFTC, how confident or unconfident are you that your estimation is accurate?

- Extremely confident (4)
- Confident (5)
- Somewhat confident (6)
- Neutral (7)
- Somewhat unconfident (8)
- Unconfident (9)
- Extremely unconfident (10)
- Never required to provide income estimate (11)

*Skip To: Q16 If When estimating your family's annual income for WfFTC, how confident or unconfident are you that... = Never required to provide income estimate*

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Page Break

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Q15 What aspects of your family's income and circumstances do you find difficult to predict for WfFTC purposes?

(Please select all that apply)

- How much you are going to receive from salary and wages (4)
  - How much Government financial assistance you/your partner will receive (5)
  - How much other income you/your partner will receive (E.g., interest income, dividends or investment income) (6)
  - How much business income you/your partner will receive (7)
  - How much child support or private maintenance you/your partner will receive (8)
  - How much child support or private maintenance you/your partner will pay (9)
  - Whether your childcare or relationship status will change (10)
  - I don't find any of these difficult to predict (11)
  - Other (Please specify) (12)
- 

Page Break

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Q16 Based on your understanding, which of the following types of income are included when estimating annual income for WfFTC?

(Please select all that apply)

- Salary and wages from employment (4)
  - Self-employed income (5)
  - Business income (E.g., shareholder salary or drawings) (6)
  - Income from main benefits (Jobseeker Support, Sole Parent Support, Supported Living payment) (7)
  - Other Government financial support (Accommodation Supplement, Disability Support) (8)
  - Child Support or private maintenance received (9)
  - Loans received (10)
  - Other income received (E.g., interest income, dividends, investment income) (11)
  - Other (Please specify) (12)
- 

Page Break

Q17 Based on your understanding, which of the following types of costs are included when estimating annual income for WfFTC?

(Please select all that apply)

- Child Support or private maintenance that you pay (4)
  - Business expenses (5)
  - Loan repayments (6)
  - Accommodation costs (E.g., rent, mortgage repayments, rates) (7)
  - Donations (8)
  - Ongoing or regular costs (E.g., insurance, power, internet, transport) (9)
  - Other (Please specify) (10)
- 

Page Break

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Q18 If there was an option to receive less frequent WfFTC payments throughout the year that were based on your actual circumstances instead of an estimate (reducing the likelihood of debt), how likely would you be to use this payment option?

For example, at the end of every three months, your WfFTC entitlement for those three months is calculated and paid to you based on what your family's actual income was during that period.

- Extremely likely (4)
- Likely (5)
- Somewhat likely (6)
- Neutral (7)
- Somewhat unlikely (8)
- Unlikely (9)
- Extremely unlikely (10)

End of Block: Income estimations

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## Instructions for scripting

1. Add a progress bar to each screen
2. Section headings in **orange** are a guide for stakeholders only and should be hidden from survey respondents
3. Routing and other scripting instructions are shown in **blue**.

## Customised survey introduction pages

RD1. Respondent definition

NON-BUSINESS INDIVIDUAL – recent contact	1
BUSINESS – recent contact	2
NON-BUSINESS INDIVIDUAL – random sample	3
BUSINESS – random sample	4

### Non-business Individuals recent contact

**CODE 1 IN RD1 & DISPLAY INTRODUCTION BELOW**

*Thank you for taking this short, but important survey.*

*Please note, your name and personal information will kept confidential to Kantar Public, formerly Colmar Brunton, and will not be provided to Inland Revenue. When answering questions, please don't include any information that could identify you.*

*The first few questions are about the **last** matter you personally contacted Inland Revenue about. Contact could include a phone call, sending or replying to an email, sending a letter or form to them in the post, a face to face meeting, visiting their website or using one of their online services.*

**Now go to CX1**

### Businesses recent contact

**CODE 2 IN RD1 & DISPLAY INTRODUCTION BELOW**

*Thank you for taking this short, but important survey.*

*Please note, your name and personal information will kept confidential to Kantar Public, formerly Colmar Brunton, and will not be provided to Inland Revenue. When answering questions, please don't include any information that could identify you.*

*The first few questions are about the **last** matter you contacted Inland Revenue about. Contact could include a phone call, sending or replying to an email, sending a letter or form to them in the post, a face to face meeting, visiting their website or using one of their online services.*

**Now go to CX1**

### Non-business Individuals random sample

**CODE 3 IN RD1 & DISPLAY INTRODUCTION BELOW**

Thank you for taking this short, but important survey.

Please note, your name and personal information will kept confidential to Kantar Public, formerly Colmar Brunton, and will not be provided to Inland Revenue. When answering questions, please don't include any information that could identify you.

Firstly, we're interested in what you think of Inland Revenue generally.

**Now go to IM1**

**Businesses random sample**

**CODE 4 IN RD1 & DISPLAY INTRODUCTION BELOW**

Thank you for taking this short, but important survey.

Please note, your name and personal information will kept confidential to Kantar Public, formerly Colmar Brunton, and will not be provided to Inland Revenue. When answering questions, please don't include any information that could identify you.

Firstly, we're interested in what you think of Inland Revenue generally.

**Now go to IM1**

**Individuals with business interests/entities with 0-1 employees recent contact**

**DISPLAY INTRODUCTION BELOW**

Thank you for taking this short, but important survey.

Please note, your name and personal information will kept confidential to Kantar Public, formerly Colmar Brunton, and will not be provided to Inland Revenue. When answering questions, please don't include any information that could identify you.

We're interested in the **last** matter you contacted Inland Revenue about. Contact could include a phone call, sending or replying to an email, sending a letter or form to them in the post, a face to face meeting, visiting their website or using one of their online services.

S1b. Was the last matter you contacted Inland Revenue about related to your business interests (such as a rental property, a trust, or being self-employed)?

Yes	1
No	2

**IF 2 CODED IN S1B, CODE 1 IN RD1 (INDIVIDUAL RECENT CONTACT)**

**IF 1 CODED IN S1B, CODE 2 IN RD1 (BUSINESS RECENT CONTACT)**

**Now go to CX1**

**Individuals with business interests/entities with 0-1 employees random sample**

**DISPLAY INTRODUCTION BELOW**

Thank you for taking this short, but important survey.

Please note, your name and personal information will kept confidential to Kantar Public, formerly Colmar Brunton, and will not be provided to Inland Revenue. When answering questions, please don't include any information that could identify you.

Firstly, we're interested in what you think of Inland Revenue generally.

**Now go to IM1**

## Types of interaction

CX1a. What was the last matter **mainly** about?

**PLEASE SELECT ONE ANSWER TO DESCRIBE THE MAIN PURPOSE OF YOUR CONTACT.**

To find out about your tax obligations or eligibility for something	1
To register/enrol for a tax or entitlement	2
To register or activate your myIR service/other online service	3
To check an IRD number, tax code, or tax rate to use	4
To update Inland Revenue about your details or a change in your situation	5
To file a return, submit a form, or provide information Inland Revenue asked me for	6
To make a payment or repayment to Inland Revenue	7
To check an account balance or transactions	8
To sort out an amount taken out of your pay or bank account/an employee's pay	9
To query what you owe Inland Revenue	10
To query a tax refund or other payment owed to you	11
To query an assessment of tax or an entitlement	12
To confirm that something has been received or processed	13
To fix a problem/mistake	14
To give Inland Revenue feedback	15
Something else (please tell us)	16

**ONLY SHOW CX1B IF 1 CODED IN CX1A**

CX1b. Just to check, is this a tax or entitlement you are already registered for?

Yes	1
No	2

**NOW GO TO CX2**

**ONLY SHOW CX1C IF 5 CODED IN CX1A**

CX1c. Just to check, what changed about your details or situation?

**PLEASE TYPE YOUR ANSWER BELOW AND BE AS DETAILED AS POSSIBLE. WHEN ANSWERING, PLEASE DON'T INCLUDE ANY INFORMATION THAT COULD IDENTIFY YOU, SUCH AS YOUR NAME OR IRD NUMBER.**

We know many people's situations will have changed with the outbreak of COVID-19. If you would prefer not to answer this question, that's completely fine.

**Now go to CX2**

## Product

CX2. And which of these did your issue or matter **mainly** relate to?

PLEASE SELECT ONE ANSWER TO DESCRIBE THE MAIN PURPOSE OF YOUR CONTACT.

**IF NON-BUSINESS INDIVIDUAL CUSTOMER, ONLY SHOW RESPONSE CATEGORIES 1,2,3,4,5,6,11,12. ALL OTHER CUSTOMERS, SHOW ALL RESPONSE CATEGORIES  
RANDOMISE OPTIONS BUT FIX CATEGORIES 11 & 12 TO SHOW LAST**

Working for Families	1
Student Loan	2
Child Support	3
Paid Parental Leave	4
KiwiSaver	5
Income tax	6
Provisional Tax	7
GST	8
PAYE and other employer deductions and returns	9
FBT (or Fringe Benefit Tax)	10
Something else (please tell us) _____	11
Don't know	12

## Channel

CX3a. How did you deal with Inland Revenue about this matter?

**SELECT ALL THAT APPLY**

Email	1
Text (txt) messaging	2
Online	3
Telephone (landline, mobile or smartphone)	4
Post	5
Face to face meeting	6
Don't know	7

**GO TO CX4**

**ONLY SHOW CX3B IF MORE THAN ONE OPTION CODED IN CX3A, AND ONLY DISPLAY OPTIONS CODED IN CX3A**

CX3b. And what was the **main** way you dealt with Inland Revenue?

**SELECT ONE ONLY**

Email	1
Text (txt) messaging	2
Online	3
Telephone (landline, mobile or smartphone)	4
Post	5
Face to face meeting	6
Don't know	7

**GO TO CX4**

CX3c. In total, how many times did you contact Inland Revenue to resolve this matter? (Make sure you include **all** the methods you used to contact Inland Revenue.)

It's still not resolved	1
Once	2
2 - 3 times	3
4 - 5 times	4
More than 5 times	5
Don't know	6

**ONLY SHOW CX3D IF 3 (ONLINE) ONLY OPTION CODED IN CX3A, OR 3 CODED IN CX3B**

CX3d. When you went online, what did you do?

**SELECT ALL THAT APPLY**

Used myIR or another online service on Inland Revenue's website	1
Visited the Inland Revenue website but didn't use myIR or any other online service	2
Used the Inland Revenue app	3
Posted to Inland Revenue's Facebook page or Twitter account	4
None of these	5

**ONLY SHOW CX3E IF 3 (ONLINE) ONLY OPTION CODED IN CX3A, OR 3 CODED IN CX3B**

CX3e. What kind of device did you use when you went online?

Desktop or laptop computer	1
Tablet or notebook	2
Smartphone	3
Another device	4
Don't know	5

**ONLY SHOW CX3F IF 3 (SMARTPHONE) CODED IN CX3E**

CX3f. And how easy was using your smartphone to do what you wanted to online?

**REVERSE ORDER OF SCALE FOR 50% OF SAMPLE**

Very difficult	1
Difficult	2
Somewhat difficult	3
Neutral	4
Somewhat easy	5
Easy	6
Very easy	7

**Now go to CX3I**

**ONLY SHOW CX3G IF 4 (TELEPHONE) ONLY OPTION CODED IN CX3A, OR 4 CODED IN CX3B. IF NON-BUSINESS INDIVIDUAL CUSTOMER, ONLY SHOW RESPONSE CATEGORIES 1,3 AND 4**

CX3g. When you used the telephone, what did you do?

**SELECT ALL THAT APPLY**

Spoke to someone in an Inland Revenue call centre (after calling an 0800 number)	1
Spoke to the Inland Revenue account manager for my business	2
Spoke to someone else at an Inland Revenue office or branch	3
None of the above	4

**NOW GO TO CX3I**

**ONLY SHOW CX3H IF 6 (FACE TO FACE) ONLY OPTION CODED IN CX3A, OR 6 CODED IN CX3B. IF NON-BUSINESS INDIVIDUAL CUSTOMER, ONLY SHOW RESPONSE CATEGORIES 2,3,4**

CX3h. When you met face to face, what did you do?

**SELECT ALL THAT APPLY**

Met with the Inland Revenue account manager for my business	1
Met a member of the reception staff at an Inland Revenue office or branch	2
Met with someone else from an Inland Revenue office or branch	3
None of these	4

**NOW GO TO CX3I**

CX3i. How did your experience of interacting with Inland Revenue <INSERT TEXT> compare to your expectations?

**FOR TEXT SUBSTITUTION USE RESPONSE TO CX3A IF SINGLE REPSONSE, OTHERWISE USE CX3B.**

**IF 1 CODED AT CX3A INSERT TEXT "USING EMAIL"**

**IF 2 CODED AT CX3A INSERT TEXT "USING TXT MESSAGING"**

**IF 3 CODED AT CX3A INSERT TEXT "BY GOING ONLINE"**

**IF 4 CODED AT CX3A INSERT TEXT "USING THE PHONE"**

**IF 5 CODED AT CX3A INSERT TEXT "BY POST"**

**IF 6 CODED AT CX3A INSERT TEXT "BY A FACE TO FACE MEETING"**

**REVERSE ORDER OF SCALE FOR 50% OF THE SAMPLE, BUT ALWAYS DISPLAY DON'T KNOW LAST**

It did not meet my expectations	1
	2
	3
It met my expectations	4
	5
	6
It exceeded my expectations	7
Don't know - I didn't have any expectations	8

### Ease, time & stress

CX4. Still thinking about the last matter you personally contacted Inland Revenue about, how much do you agree or disagree that...?

**REVERSE ORDER OF SCALE FOR 50% OF THE SAMPLE. RANDOMISE STATEMENTS.**

	Strongly agree	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree	Strongly disagree
It was easy for me to get the information I needed	1	2	3	4	5	6	7
I felt confident that I was doing the right thing	1	2	3	4	5	6	7
It was easy for me to do	1	2	3	4	5	6	7
The amount of time involved was acceptable	1	2	3	4	5	6	7
It was free from stress or frustration	1	2	3	4	5	6	7
I felt reassured I got it right	1	2	3	4	5	6	7
I knew what I needed to do next	1	2	3	4	5	6	7

### Overall satisfaction & ease

Now please think **overall** about the last matter you personally contacted Inland Revenue about.

CX5a. How satisfied or dissatisfied are you with your **overall interaction** with Inland Revenue?

**REVERSE ORDER OF SCALE FOR 50% OF THE SAMPLE**

Very dissatisfied	1
Dissatisfied	2
Somewhat dissatisfied	3
Neutral	4
Somewhat satisfied	5
Satisfied	6
Very satisfied	7

**ONLY SHOW CX5B IF 1-3 CODED IN CX5A**

CX5b. What made you feel dissatisfied?

**PLEASE BE AS DETAILED AS POSSIBLE. WHEN ANSWERING, PLEASE DON'T INCLUDE ANY INFORMATION THAT COULD IDENTIFY YOU, SUCH AS YOUR NAME OR IRD NUMBER.**

**ONLY SHOW CX5C IF 5-7 CODED IN CX5A**

CX5c. What made you feel satisfied?

**PLEASE BE AS DETAILED AS POSSIBLE. WHEN ANSWERING, PLEASE DON'T INCLUDE ANY INFORMATION THAT COULD IDENTIFY YOU, SUCH AS YOUR NAME OR IRD NUMBER.**



CX5d. How easy or difficult did you find it dealing with Inland Revenue?

**REVERSE ORDER OF SCALE FOR 50% OF THE SAMPLE**

Very difficult	1
Difficult	2
Somewhat difficult	3
Neutral	4
Somewhat easy	5
Easy	6
Very easy	7

Thanks, there are no more questions about your last interaction with Inland Revenue. Please click the forward arrow to continue.

### Views of Inland Revenue

IM1. Please note that for the next questions we're talking about how Inland Revenue goes about its business and **not** about tax rates or tax laws. By understanding people's views about them, Inland Revenue can learn how to improve the information and service it provides everyone in New Zealand.

Over the last year have your views of Inland Revenue...

Improved	1
Got worse	2
Stayed the same	3
I never really had any impression of Inland Revenue	4

**ONLY ASK IM2 IF 1 OR 2 CODED IN IM1**

IM2. What was it that changed your views of Inland Revenue?

**PLEASE BE AS DETAILED AS POSSIBLE. WHEN ANSWERING, PLEASE DON'T INCLUDE ANY INFORMATION THAT COULD IDENTIFY YOU, SUCH AS YOUR NAME OR IRD NUMBER.**

## Recall of information about tax and Inland Revenue

RI1. In the last 3 months have you seen or heard anything about Inland Revenue?

Yes	1
No	2
Don't know	3

GO TO C1

GO TO C1

RI2. What was it you saw or heard?

PLEASE BE AS DETAILED AS POSSIBLE. WHEN ANSWERING, PLEASE DON'T INCLUDE ANY INFORMATION THAT COULD IDENTIFY YOU, SUCH AS YOUR NAME OR IRD NUMBER.

RI3. And thinking about all information you've seen or heard about Inland Revenue, would you say it was...

Mostly positive	1
Mostly negative	2
A mix of both positive and negative	3
Don't know	4

RI4. And where did you see or hear something about Inland Revenue?

ROTATE CODES 1 TO 14 AND SHOW CODE 10 BEFORE CODE 11.

SELECT AS MANY AS APPLY

Friends or family	1
Work colleagues or employer	2
News/current affairs in any media (TV, radio, online, newspapers, etc)	3
In person from someone at Inland Revenue (phone or over the counter)	4
Inland Revenue's website	5
Emails from Inland Revenue	6
Letter in the post from Inland Revenue	7
Pamphlets or posters from Inland Revenue (that came in the post or were seen in other places)	8
Advertising from Inland Revenue (online, radio, newspapers, magazines)	9
Social media postings from Inland Revenue (Facebook, Twitter, LinkedIn)	10
Other social media postings (not from Inland Revenue)	11
Blog posts, or comments on blogs or online forums	12
Citizen's Advice Bureau	13
A person with a tax or legal qualification	14
Other (please tell us) _____	15
Don't know	16

## Customer sentiment (tax morale)

CS1 REMOVED FROM APRIL UNTIL 11 MAY 2020

### INTRODUCTORY TEXT FOR RANDOM SAMPLE ONLY:

We know many people's situations will have changed with the outbreak of COVID-19. If you would prefer not to answer this question, that's completely fine.

CS1. How much do you agree or disagree that...

**RANDOMISE STATEMENTS. SCALE ORDER SAME AS CX4 (PREFER NOT TO ANSWER ALWAYS LAST).**

	Strongly agree	Agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Disagree	Strongly disagree	Prefer not to answer
I feel good about paying my tax	1	2	3	4	5	6	7	9
Inland Revenue helps people who are trying to get things right	1	2	3	4	5	6	7	9
If someone tries to avoid paying the right amount of tax, they will get into trouble with Inland Revenue	1	2	3	4	5	6	7	9

## Trust in Inland Revenue

TR1. Overall, to what extent do you trust Inland Revenue?

**REVERSE ORDER OF SCALE FOR 50% OF THE SAMPLE, BUT ALWAYS DISPLAY DON'T KNOW LAST**

Do not trust them at all	1
	2
	3
	4
	5
	6
Trust them completely	7
Don't know	8
Prefer not to answer	9

TR2 INTRODUCED FROM 18 JAN 2021 –REMOVED 09 AUGUST 2022 – RE-INTRODUCED 07 FEBRUARY 2023

**ASK TR2 IF GENERAL PUBLIC AND TR1=CODES 1 to 7, OTHERWISE SKIP TO DEMOGRAPHICS (I.E. ALL RECENT CONTACT SAMPLE, AND GENERAL PUBLIC TR1 CODES 8 OR 9 SKIP TR2).**

TR2. For what reasons have you given this rating for how much you trust Inland Revenue?

**PLEASE BE AS DETAILED AS POSSIBLE. WHEN ANSWERING, PLEASE DON'T INCLUDE ANY INFORMATION THAT COULD IDENTIFY YOU, SUCH AS YOUR NAME OR IRD NUMBER.**

TR6 INTRODUCED FROM 07 FEBURUARY 2023

TR6. How much do you agree or disagree that...

**RANDOMISE STATEMENTS. SCALE ORDER SAME AS CX4**

	Strongly agree	Agree	Some-what agree	Neither agree nor disagree	Some-what disagree	Disagree	Strongly disagree
I can trust the Inland Revenue to do what is right	1	2	3	4	5	6	7
Inland Revenue works for the benefit of all New Zealanders	1	2	3	4	5	6	7
The people at Inland Revenue are capable of doing their job well	1	2	3	4	5	6	7
I feel that the people at Inland Revenue are trustworthy	1	2	3	4	5	6	7

### Drivers of trust (placeholder)

NOTE: There will be some timed implicit questions in this module.

TR3. Drivers of trust in the tax system

TR4. Drivers of trust in Inland Revenue

### Communications questions (placeholder)

NOTE: It's possible there may be some timed implicit questions in this module.

- C1. Awareness of campaign or specific activity/advertisement (unprompted and prompted)
- C2. Channel
- C3. Cut-through (opened/read/watched right through)
- C4. Message recall & outtake
- C5. Emotive response (believable, relevant, gave confidence in Inland Revenue)
- C6. Call to action (e.g. more likely to use Inland Revenue online services)
- C7. Commitment to taking action (if behavioural action/change is desired)

## Demographics

The next questions are about you. These questions help Inland Revenue make sure it is meeting the needs of different types of people. Your answers are totally confidential and Inland Revenue doesn't share the data from this survey with anyone.

DI1. Are you...

Male	1
Female	2
Gender diverse	3

DI2. Which age group are you in?

18-19 years	1
20-24 years	2
25-29 years	3
30-34 years	4
35-39 years	5
40-44 years	6
45-49 years	7
50-54 years	8
55-59 years	9
60-64 years	10
65-69 years	11
70-74 years	12
75-79 years	13
80 years and over	14

DI3. Which ethnic groups do you belong to? You can choose more than one.

**SELECT AS MANY AS APPLY**

New Zealand European	1
Māori	2
Samoan	3
Cook Island Māori	4
Tongan	5
Njuean	6
Chinese	7
Indian	8
Another Pacific group (please tell us) _____	9
Another Asian group (please tell us) _____	10
Another European group (please tell us) _____	11
A group not mentioned above (please tell us) _____	12

DI4 REMOVED FROM 14 APRIL UNTIL 10 MAY 2020

- DI4. What's the total income of your household, before tax? Please include all sources of income including any benefits and returns from investments. Your best estimate is fine.

None	1
\$0 to \$10,000	2
\$10,001 to \$20,000	3
\$20,001 to \$30,000	4
\$30,001 to \$40,000	5
\$40,001 to \$50,000	6
\$50,001 to \$60,000	7
\$60,001 to \$70,000	8
\$70,001 to \$80,000	9
\$80,001 to \$90,000	10
\$90,001 to \$100,000	11
\$100,001 to \$110,000	12
\$110,001 to \$120,000	13
Over \$120,000	14
Don't know	15
Prefer not to answer	16

- DI5. What's your highest completed educational qualification?

No qualification	1
School Certificate or NCEA Level 1	2
Sixth Form Certificate, University Entrance or NCEA Level 2	3
Bursary, Scholarship or NCEA Level 3 or 4	4
A trade qualification	5
A certificate or diploma that does not require a degree	6
A polytech degree	7
A university degree	8
Postgraduate qualification, e.g. Honours, Masters, Doctorate, Fellowship, Postgraduate Diploma	9
Other (please tell us) _____	10
Prefer not to answer	16

DI6 REMOVED FROM 14 APRIL UNTIL 10 MAY 2020

DI6. What's your current employment situation?

**SELECT ONE - IF MORE THAN ONE APPLIES, SELECT THE ONE THAT TAKES UP MOST OF YOUR TIME**

Employed full-time (that is, 30 hours a week or more)	1
Employed part-time	2
Self-employed	3
Own your own business	4
Studying full time	5
Not employed, but available for work	6
Not employed and not available for work	7
Other (please tell us) _____	8
Prefer not to answer	9

DI7. How did you personally get income, over the last 12 months? (Please exclude any loans).

**SELECT ALL THAT APPLY**

No source of income in that time	1
Wages, salary, commissions, bonuses paid by my employer	2
Self-employment, or a business I own and work in	3
Interest, dividends, rent, other investments	4
Regular payments from ACC or a private work accident insurer	5
NZ Superannuation or Veteran's Pension	6
Jobseeker Support	7
Sole Parent Support	8
Supported Living Payment	9
Student Allowance	10
Working for Families	11
Child Support payments from Inland Revenue	12
Paid Parental Leave	13
Other government benefits or war pensions	14
Other sources of income, counting support payments from people who don't live in your household (please tell us) _____	15
Prefer not to answer	

The next questions are to help understand if people with different situations are getting the same standard of service as others.

D18. How much difficulty do you have doing the following?

**RANDOMISE STATEMENTS**

	No difficulty	Some difficulty	A lot of difficulty	Cannot do at all	Prefer not to answer
Seeing, even if wearing glasses	1	2	3	4	
Hearing, even if using hearing aids	1	2	3	4	
Walking or climbing steps	1	2	3	4	
Remembering or concentrating	1	2	3	4	
Self-care such as washing all over or dressing	1	2	3	4	
Communicating and being understood in your usual language	1	2	3	4	

D19. Which of the following best describes your living situation?

I rent the home I'm living in	1
I own or part-own the home I live in	2
I have invested in residential property	3
I plan to buy a home or property to live in within the next 10 years	4
I plan to invest in residential property in the next 10 years	5
None of these	6
Prefer not to answer	

**ONLY ASK IF 3 OR 4 CODED IN D17 OR IF INDIVIDUALS WITH BUSINESS INTERESTS/ENTITIES WITH 0-1 EMPLOYEES**

D110. When it comes to your tax matters, do you consider yourself to be operating as a business or organisation?

Yes, I operate as a business or organisation	1
No, I don't operate as a business or organisation	2

**GO TO CLOSE**

**NON-BUSINESS INDIVIDUALS GO TO CLOSE.**



*Lastly, a few questions about your business.*

We know many people's situations will have changed with the outbreak of COVID-19. If you would prefer not to answer any of the following questions, that's completely fine.

- DB1. How many employees does your business or organisation usually have (not including yourself)? Please include both full-time and part-time staff in your answer.

0	1
1	2
2-5	3
6-10	4
11-20	5
21-50	6
51-100	7
Over 100	8
Don't know	9
Prefer not to answer	

DB2 REMOVED FROM 14 APRIL UNTIL 10 MAY 2020

- DB2. About how many years' experience in total do you have owning or managing any business?

Less than 1 year	1
1-2 years	2
3-4 years	3
5-6 years	4
7-10 years	5
More than 10 years	6
Prefer not to answer	

- DB3. What is the annual turnover of your business/organisation?

No turnover	1
\$0 to \$60,000	2
\$60,001 to \$125,000	3
\$125,001 to \$250,000	4
\$250,001 to \$1 million	5
\$1 million to \$30 million	6
\$30 million to \$100 million	7
Over \$100 million	8
Don't know	9
Prefer not to answer	

DB4 INTRODUCED FROM 18 JUNE 2021

DB4. In your opinion, what's the situation that your business/organisation is in right now?

Starting out / in start-up mode	1
Surviving / in survival mode	2
Actively growing	3
Keeping about the same	4
Getting the business ready for sale	5
Winding up the business / getting ready to close down	6
Don't know	7
Prefer not to answer	8

DB5 INTRODUCED FROM 15 NOVEMBER 2021

DB5. Which of the following apply to your business?

**RANDOMISE STATEMENTS EXCEPT NONE (6)**

**SELECT ALL THAT APPLY**

Totally or partly owned by whānau, hapū, or iwi Māori	1
Promotes Māori culture/tikanga	2
Employs assets received from Treaty settlement claims, for example agriculture, fisheries, tourism, real estate, etc	3
Provides services for Māori	4
The business's objectives include providing employment opportunities for whānau/hapū/iwi Māori	5
None of these apply	6

## Close

CL1. If there are any final thoughts you'd like to share or comments about this survey, please type them in the box below.

**PLEASE BE AS DETAILED AS POSSIBLE. WHEN ANSWERING, PLEASE DON'T INCLUDE ANY INFORMATION THAT COULD IDENTIFY YOU, SUCH AS YOUR NAME OR IRD NUMBER.**

*That's it - that's all the questions we have! Thank you for your time today. We really appreciate you sharing your views.*

*If you have any further questions about this survey, you can contact us directly at [survey@colmarbrunton.co.nz](mailto:survey@colmarbrunton.co.nz)*

## Administrative data

### IR1. Customer segment

A. FAMILIES	1
B. INDIVIDUALS	2
C. MICRO	3
D. SME	4
E. SIGNIFICANT	5
Missing	6

### IR2. Not for Profit status

Yes – a not for profit organisation	1
No	2

### IR3. Have social policy product

Yes – have a social policy product	1
No	2

### IR4. Years business has been operating

Up to 1 year	1
1-2 years	2
3-5 years	3
6-10 years	4
More than 10 years	5
Not recorded in IR administrative data	6

### IR5. Entity type

Company	1
Diplomatic M	2
Government Department	3
Individual	4
Maori Authority	5
Partnership	6
Society/Club	7
Superannuation Fund	8
Trust	9
Unit Trust	10

## IR6. IR region where customer resides

Missing (not recorded in IR administrative data)	1
Area outside regions	2
Auckland	3
Bay of Plenty	4
Canterbury	5
Gisborne	6
Hawke's Bay	7
Manawatu-Wanganui	8
Marlborough	9
Nelson	10
Northland	11
Otago	12
Southland	13
Taranaki	14
Tasman	15
Waikato	16
Wellington	17
West Coast	18

## IR7. Industry sector

Missing (not recorded in IR administrative data)	1
A: Agriculture, Forestry and Fishing	2
B: Mining	3
C: Manufacturing	4
D: Electricity, Gas, Water and Waste Services	5
E: Construction	6
F: Wholesale Trade	7
G: Retail Trade	8
H: Accommodation and Food Services	9
I: Transport, Postal and Warehousing	10
J: Information Media and Telecommunications	11
K: Financial and Insurance Services	12
L: Rental, Hiring and Real Estate Services	13
M: Professional, Scientific and Technical Services	14
N: Administrative and Support Services	15
O: Public Administration and Safety	16
P: Education and Training	17
Q: Health Care and Social Assistance	18
R: Arts and Recreation Services	19
S: Other Services	20
T: Not Elsewhere Included	21

IR8. Gender for purposes of weighting Individuals sample

Male	1
Female	2

IR9. KiwiSaver indicator (getKSSind)

Yes	1
No	2

IR10. Non-custodial Parent Paying Child Support indicator (getNCPind)

Yes	1
No	2

IR11. Custodial Parent Receiving Child Support indicator (getCPRind)

Yes	1
No	2

IR12. Student Loan indicator (getSLsind)

Yes	1
No	2

IR13. Paid Parental Leave indicator (getPPLind)

Yes	1
No	2

IR14. Working for Families indicator (getFAMind)

Yes	1
No	2

IR15. FBT indicator (getFBTind)

Yes	1
No	2

IR16. Income Tax indicator (getINCind)

Yes	1
No	2

IR17. GST indicator (getGSTind)

Yes	1
No	2

IR18. PAYE indicator (getPAYind)

Yes	1
No	2

IR19. Provisional Tax indicator (getProvind)

Yes	1
No	2

**END**

RELEASED UNDER THE  
OFFICIAL INFORMATION ACT

# Disputes Review Unit - customer survey

Q1. Did we keep you appropriately updated on the status of the adjudication of this dispute?

- Strongly no (1)
- No (2)
- Neutral (3)
- Yes (4)
- Strongly yes (5)

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Q14 Optional comments:

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RELEASED UNDER THE OFFICIAL INFORMATION ACT

Q2. Was the Adjudication Report completed in an appropriate time?

- Strongly no (1)
  - No (2)
  - Neutral (3)
  - Yes (4)
  - Strongly yes (5)
- 

Q13 Optional comments:

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Q3. Did the Adjudication Report address the main arguments?

- Strongly no (1)
  - No (2)
  - Neutral (3)
  - Yes (4)
  - Strongly yes (5)
-



Q15 Optional comments:

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Q4. Did the Adjudication Report clearly explain the reasoning for the conclusions reached?

- Strongly no (1)
- No (2)
- Neutral (3)
- Yes (4)
- Strongly yes (5)

Q16 Optional comments:

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Q5. Were you persuaded by the conclusions reached in the Adjudication Report?

- Strongly no (1)
  - No (2)
  - Neutral (3)
  - Yes (4)
  - Strongly yes (5)
- 

Q18 Optional comments:

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Q6. Did the Adjudication Report provide an objective review of this dispute?

- Strongly no (1)
  - No (2)
  - Neutral (3)
  - Yes (4)
  - Strongly yes (5)
-

Q17 Optional comments:

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Q7. Overall, were you satisfied with the adjudication service we provided for this dispute?

- Strongly no (1)
- No (2)
- Neutral (3)
- Yes (4)
- Strongly yes (5)

Q19 Optional comments:

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OFFICIAL INFORMATION ACT  
RELEASED UNDER THE

Q8. Was the adjudication phase of the disputes process a useful step for this dispute?

- Strongly no (1)
- No (2)
- Neutral (3)
- Yes (4)
- Strongly yes (5)

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Q20 Optional comments:

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Q9. Was the Adjudication Report useful to you because of (please tick all that apply):

- The detailed analysis of the issues and arguments? (1)
- The independent and impartial review of the dispute? (2)
- The opportunity to have the dispute resolved? (3)
- The potential use for any future court proceedings? (4)
- The potential use for any future settlement discussions? (5)
- Other (6) \_\_\_\_\_

---

Q10. Did the outcome reached in the Adjudication report:

- Agree with your position? (1)
- Partly agree with your position? (2)
- Disagree with your position? (3)

---

Q11. For this dispute, were you:

- The taxpayer? (1)
- The taxpayer's agent or representative? (2)
- An Inland Revenue staff member? (3)

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Q12. We would appreciate any other comments or suggestions you have:

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RELEASED UNDER THE OFFICIAL INFORMATION ACT

## Go Live Release 4 Pulse Survey for Employers

We're interested in the experience you've had submitting your employer information to Inland Revenue. Your feedback will help us to continue improving this service.

Q1: Thinking about your most recent experience filing employer information, which method did you use to file?

Paper/filled in a pre-printed form	1
I completed all of the return in myIR	2
We used our own payroll software and then uploaded the information in myIR	4
Our software sent the information directly to Inland Revenue. (It doesn't use myIR)	3
Someone else filed on my behalf (e.g. staff, a tax agent, payroll bureau or bookkeeper)	5 <b>SKIP TO END</b>

Q2. Thinking about your most recent experience filing employer information, How easy or difficult was it to do what you needed to?

Very easy	1	<b>Go to Q3a</b>
Quite easy	2	<b>Go to Q3b</b>
Quite difficult	3	<b>Go to Q2a</b>
Very difficult	4	<b>Go to Q2b</b>
Don't know/Can't remember	5	<b>SKIP TO END</b>

Q2a: Ask if Q2 answer = quite difficult or very difficult:

What was it that was difficult? Please be as detailed as possible.

TEXT
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Q2b: (if filing experience was quite or very difficult)

If you provided a comment in the previous question, which of the following categories does your comment belong to? You can choose more than one option. **RANDOMISE**

Enrolling a new employee in myIR is unclear	
Combined notifications are confusing	
Getting used to all employer information in one place	
Received an error message	
I need to add extra employee information	
Ceased employee details were included in my current return	
Hard to find my way around online	
Issues related to help function in myIR	
Language was hard to understand	
Inland Revenue system stability issues (slow, time outs, etc.)	
Unsure of new payment process in myIR	
Connectivity issues using payroll software (e.g. Xero, MYOB) to file my return	
Unsure how to correct the return	
Don't know (code separate)	
Something else	

Q3a: Ask if Q2 answer = quite easy or very easy

What made it easy for you? Please be as detailed as possible.

[FREE LONG TEXT]
------------------

Q3b: (if filing experience was easy or very easy).

If you have provided a comment in the previous question, which of the following categories does your comment belong to? You can choose more than one option. **RANDOMISE**

Combined customer notifications make it easy	
Adding a new employee is easy in myIR	
Clear what I needed to do	
I like knowing when an employee's student loan is nearly paid off	
All employer information is now in one place	
Easy to find my way around online	
The help function was useful in myIR	
Easy new payment process in myIR	
Language was easy to understand	
Inland Revenue system was really stable (page loaded easily, no time outs, etc.) [onscreen/upload only]	
Easy to connect using payroll software	
Don't know (CODE SEPARATE)	
Something else	

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Q4: Have you seen or experienced any of the following changes when you last filed your employer information return?

	Yes	No
Employee notifications have been combined into one communication	1	2
You have been informed when an employee's student loan is nearly paid off.	1	2
All of the employee tax information is now in one place (myIR only)	1	2
Added information about new employees	1	2
Make a PAYE payment in myIR (myIR and bulk upload only)	1	2

Q5: **Customers will only be presented with statements related to their "Yes" answers in Question 4 above.**

To what extent have the following changes made filing employer information easier or more difficult for you? (RANDOMISE statements)

	Much more difficult	Somewhat more difficult	Neither easier or more difficult	Somewhat easier	Much easier
Notifications about employees have been combined, so you receive one communication now, instead of many.	1	2	3	4	5
Being informed when an employee's student loan is nearly paid off and what their new tax code is.	1	2	3	4	5
All the employee tax information is now located in one place (myIR only)	1	2	3	4	5
Combining KiwiSaver and other new employee information into one form.	1	2	3	4	5
Being able to make a PAYE payment in myIR	1	2	3	4	5

**Thank You Page**

Thank you for your time in completing the survey.



# FAM Awareness - Policy Team

---

Start of Block: Default Question Block

Q1 Working for Families tax credits are payments for families with dependent children aged 18 and under to help with the cost of raising a family. Entitlements are based on your yearly family income and family circumstances.

Were you aware of this before reading about it here?

- Yes (1)
- No (2)
- Not sure (3)

---

Page Break

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Q2 There are different types of Working for Families tax credit payments. Eligibility for the different payments is based on each family's circumstances.

Which of the following Working for Families tax credit payments were you aware of before reading about them here?

	Aware (1)	Not aware (2)	Not sure (3)
Family tax credit (FTC) – eligibility is based on a family's yearly income and number of dependent children in their care. (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Minimum Family tax credit (MFTC) - currently, if a family's income is less than \$31,096 after tax for the year and they do not receive a main benefit, they may be eligible for the MFTC. (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Best Start tax credit (BSTC) - if a family has a child under the age of 3, they may be eligible for the BSTC. (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
In Work tax credit (IWTC) - if a family does not receive a main benefit and does get some money from paid work each week, they may be eligible for the IWTC. (4)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

End of Block: Default Question Block

Start of Block: BSTC

*Display This Question:*  
 If There are different types of Working for Families tax credit payments. Eligibility for the differ... = Best Start tax credit (BSTC) - if a family has a child under the age of 3, they may be eligible for the BSTC. [ Aware ]

Q3 The Best Start tax credit (BSTC) is a payment made to families supporting a newborn baby.

Before reading it here, were you aware that:

	Aware (1)	Not aware (2)	Not sure (3)
Families who are eligible for the BSTC credit can receive a weekly \$60 payment until their baby turns 1, regardless of how much income they earn. (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
If a family is receiving paid parental leave for a newborn baby, they can only receive the \$60pw BSTC payments once their paid parental leave payments have stopped, up until their baby turns 1. (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Once their baby turns 1, depending on the family's income, they can continue to receive BSTC payments until their child turns 3. (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

End of Block: BSTC

Start of Block: IWTC

*Display This Question:*  
 If There are different types of Working for Families tax credit payments. Eligibility for the differ... = In Work tax credit (IWTC) - if a family does not receive a main benefit and does get some money from paid work each week, they may be eligible for the IWTC. [ Aware ]

Q5 There have been some recent changes to the rules for getting the In Work tax credit (IWTC).

Were you aware of the two changes below before you read them here?

	Aware (1)	Not aware (2)	Not sure (3)
From 1 July 2020, families no longer need to work a set number of hours each week to receive the IWTC as long as they get some income from paid work each week. (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
From 1 April 2021, if a family stops work or has an unpaid break in work, they can continue to receive the IWTC for up to 2 weeks. (2)			<input type="radio"/>

Page Break

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Display This Question:

If There have been some recent changes to the rules for getting the In Work tax credit (IWTC). Were... = From 1 July 2020, families no longer need to work a set number of hours each week to receive the IWTC as long as they get some income from paid work each week. [ Aware ]

Q7 How did you find out about the change to remove the requirement for a family to work a certain number of hours each week to be eligible for the IWTC?

- Read it in an online news article (1)
- Read it on social media (2)
- Heard from a friend/family member (3)
- Received an email/letter from Inland Revenue (4)
- Received an email/letter from Work and Income (5)
- Saw it on the TV news (6)
- Other – please specify (7)

---

- Don't know (8)

Page Break

Display This Question:

If There have been some recent changes to the rules for getting the In Work tax credit (IWTC). Were... = From 1 April 2021, if a family stops work or has an unpaid break in work, they can continue to receive the IWTC for up to 2 weeks. [ Aware ]

Q14 How did you find out about the change where a family can now keep receiving the IWTC payment for up to two weeks if they stop work or take an unpaid break?

- Read it in an online news article (1)
- Read it on social media (2)
- Heard from a friend/family member (3)
- Received an email/letter from Inland Revenue (4)
- Received an email/letter from Work and Income (5)
- Saw it on the TV news (6)
- Other – please specify (7)

---

- Don't know (8)

Page Break

*Display This Question:*

*If There have been some recent changes to the rules for getting the In Work tax credit (IWTC). Were... = From 1 April 2021, if a family stops work or has an unpaid break in work, they can continue to receive the IWTC for up to 2 weeks. [ Aware ]*

Q6 Do you know what a family would need to do to keep receiving IWTC payments for up to 2 weeks if they stopped working or had an unpaid break?

- Yes, please specify (1) \_\_\_\_\_
- No (2)
- Not sure (3)

End of Block: IWTC

---

Start of Block: FAM Payment options

Q8 Working for Families tax credits are calculated on a family's yearly income. Customers can choose if they want to receive their payments weekly, fortnightly, or as an end of year lump sum payment.

Which of these payment options were you aware of before you read them here?

	Aware (1)	Not aware (2)	Not sure (3)
Weekly (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fortnightly (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
End of year lump sum (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Page Break

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Display This Question:

If Working for Families tax credits are calculated on a family's yearly income. Customers can choose... = Weekly [ Aware ]

Or Working for Families tax credits are calculated on a family's yearly income. Customers can choose... = Fortnightly [ Aware ]

Q9 If a customer chooses to receive their Working for Families tax credits as a weekly or fortnightly payment throughout the year, it is calculated off their **estimated** yearly income and family circumstances.

Were you aware of this before you read it here?

- Yes (1)
- No (2)
- Not sure (3)

Display This Question:

If Working for Families tax credits are calculated on a family's yearly income. Customers can choose... = Weekly [ Aware ]

Or Working for Families tax credits are calculated on a family's yearly income. Customers can choose... = Fortnightly [ Aware ]

Q10 If a customer is receiving their Working for Families tax credits as a weekly or fortnightly payment throughout the year, they need to let Inland Revenue know if there is a change in their estimated yearly income or a change in their family circumstances.

Were you aware of this before you read it here?

- Yes (1)
- No (2)
- Not sure (3)

End of Block: FAM Payment options

Start of Block: EOYSU



Q11 All customers who receive Working for Families tax credits have their yearly entitlement confirmed at the end of the year through an end of year assessment. The end of year assessment confirms the amount of family income received throughout the year and their family circumstances to calculate the amount of their yearly Working for Families entitlement.

Were you aware of this before you read it here?

- Yes (1)
- No (2)
- Not sure (3)

---

Page Break

Q12 If an end of year assessment calculates that a customer has been overpaid Working for Families tax credits throughout the year for any reason, they may end up with an amount they need to pay back to Inland Revenue.

Were you aware of this before you read it here?

- Yes (1)
- No (2)
- Not sure (3)

---

Page Break

Q13 If there was one thing that you could change to improve Working for Families tax credits, what would it be?

---

End of Block: EOYSU

---

# FINAL Health Survey for Business customers

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Start of Block: Screening question

Q1 *Thanks for taking the time to share your feedback today.*

When you joined IR Connection your membership was with regards to the business:

#{e://Field/Legal%20Name}

Are you still involved with this business?

Yes (26)

No (27)

---

*Display This Question:*

*If Thanks for taking the time to share your feedback today. When you joined IR Connection your membe... = Yes*

Q2 For the following questions, we'd like to hear your thoughts with regards to the above business.

End of Block: Screening question

---

Start of Block: Still with business

Q3 What impact do you think COVID-19 is going to have on this business in the next 12 months?

- Significantly positive (1)
- Positive (2)
- Somewhat positive (3)
- No real impact (4)
- Somewhat negative (5)
- Negative (6)
- Significantly negative (7)
- Not sure/don't know (8)

---

Page Break

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Display This Question:

If Thanks for taking the time to share your feedback today. When you joined IR Connection your membe... = Yes

And Business Lifecycle Is Not Empty

Q4a When you joined IR Connection last year, you told us that this business was in the following stage:  $\{e://Field/Business\%20Lifecycle\}$ .

In your opinion, at what stage is this business in now?

- Starting out, in start-up mode (4)
- Surviving, or in survival mode (5)
- Actively growing (6)
- Keeping about the same (7)
- Getting the business ready for sale (8)
- Winding up the business, or getting ready to close down (9)
- Not sure (10)

---

Page Break

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*Display This Question:*

*If Thanks for taking the time to share your feedback today. When you joined IR Connection your membe... = Yes*

*And Business Lifecycle Is Empty*

Q4b In your opinion, at what stage is this business in right now?

- Starting out, in start-up mode (4)
- Surviving, or in survival mode (5)
- Actively growing (6)
- Keeping about the same (7)
- Getting the business ready for sale (8)
- Winding up the business, or getting ready to close down (9)
- Not sure (10)

---

Page Break

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Display This Question:

If Thanks for taking the time to share your feedback today. When you joined IR Connection your membe... = Yes

And Maori business indicators Is Empty

Q5 Do any of the following apply to this business?

Please select all that apply.

- Totally or partly owned by whānau, hapū, or iwi Māori (4)
- Promotes Māori culture/tikanga (5)
- Employs assets received from Treaty settlement claims (6)
- Provides services for Māori (7)
- One of this business's objectives is to provide employment opportunities for whānau/hapū/iwi Māori (8)
- None of these apply (9)

---

Page Break

Q6 Which of the following is the biggest challenge for this business right now?

- Access to skilled labour (4)
  - Staff absences (5)
  - Overheads such as rent, power and wages (6)
  - Exporting goods and products (7)
  - Reliable delivery of materials/supplies (8)
  - Costs of raw materials, transport, and freight (9)
  - Reduced revenue/profit (10)
  - Keeping the business afloat (11)
  - Tax obligations e.g., filing requirements or tax payments (12)
  - Crime (13)
  - The impact of COVID-19 (16)
  - Something else, please specify (14)
- 
- Don't know (15)

End of Block: Still with business

Start of Block: NZ challenge & IITA

Q7 Which of the following do you think is the biggest challenge facing New Zealand right now?

- Inflation and cost of living (4)
- Housing (5)
- Healthcare (6)
- Petrol prices (7)
- The economy (8)
- Poverty (9)
- Crime (10)
- Climate change and the environment (11)
- Education (12)
- COVID-19 pandemic (15)
- Global issues (e.g. the war between Russia and Ukraine) (16)
- Other - please specify (13)  
\_\_\_\_\_
- Don't know (14)

---

Page Break



Display This Question:

If Thanks for taking the time to share your feedback today. When you joined IR Connection your membe... = Yes

And party\_type = individual

And If

INC filer = autocalc

Or INC FILER = 3

Or INC FILER = autocalc - fam

Or INC FILER = autocalc - more info fam

Or INC FILER = autocalc - more info

Or INC FILER = autocalc - more info taxagt

Or INC FILER = autocalc - taxagt

Or INC FILER = 3\_taxagt

Or INC FILER = return filer (ir3)

Or If

Thanks for taking the time to share your feedback today. When you joined IR Connection your membe... = No

Q8 Did you file an individual income tax return or receive an individual income tax assessment for the tax year ended 31 March 2022?

Yes (1)

No (2)

Don't recall (3)

---

Page Break

Display This Question:

If Did you file an individual income tax return or receive an individual income tax assessment for t... = Yes

Q9 Was your income tax assessment experience this year better or worse than the year before?

- Better than the year before (1)
- The same as last year (2)
- Worse than the year before (3)
- Didn't file an income tax return or get an income tax assessment last year (4)

Page Break

Display This Question:

If Was your income tax assessment experience this year better or worse than the year before? = Better than the year before

Or Was your income tax assessment experience this year better or worse than the year before? = Worse than the year before

Q10 Please tell us why your experience was  $\{Q9/ChoiceGroup/SelectedChoices\}$ .

Please be as detailed as possible.

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End of Block: NZ challenge & IITA

Start of Block: Rental property

Q26

**We're looking for businesses to participate in some future research about residential rental property.**

**Please remember that your responses are only available to Inland Revenue's customer research team and will be used for research purposes only.**

Page Break

Q11 Does this business own any residential rental property?

*A residential rental property is a dwelling such as a house, apartment, flat, holiday home or other place of residence that earns rental income.*

- Yes (1)
- No (2)

Page Break

Display This Question:

If Does this business own any residential rental property? A residential rental property is a dwellin... = Yes

Q12 When was this residential rental property purchased?

If there is more than one, please select all that apply.

- Before 27th March 2021 (1)
- On or after 27th March 2021 (2)
- Can't recall (3)

Page Break

Display This Question:

If When was this residential rental property purchased? If there is more than one, please select all...  
= On or after 27th March 2021

Q13 Thinking about any residential rental property that was purchased on or after 27th March 2021, are any of the dwellings new builds?

Generally, a new build is a self-contained dwelling that received a Code Compliance Certificate (CCC) on or after 27th March 2020.

- Yes (1)
- No (2)
- Can't recall (3)

End of Block: Rental property

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Start of Block: Final question

Q14 Thanks for your feedback today, we really appreciate your contributions through IR Connection.

In the future, what topics would you like to provide more feedback on?

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End of Block: Final question

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# FINAL Health Survey for Ind/Fam customers

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Start of Block: IITA experience

Q1

**Thanks for taking the time to share your feedback today.**

**To begin, we'd like to understand more about your experience with your income tax assessment this year.**

---

Page Break

Q1 Did you file an individual income tax return or receive an individual income tax assessment for the tax year ended 31 March 2022?

- Yes (1)
- No (2)
- Don't recall (3)

---

Page Break

*Display This Question:*

*If Did you file an individual income tax return or receive an individual income tax assessment for t... = Yes*

Q2 Was your income tax assessment experience this year better or worse than the year before?

- Better than the year before (1)
- The same as last year (2)
- Worse than the year before (3)
- Didn't file an income tax return or get an income tax assessment last year (4)

Page Break

Display This Question:

If Was your income tax assessment experience this year better or worse than the year before? = Better than the year before

Or Was your income tax assessment experience this year better or worse than the year before? = Worse than the year before

Q3 Please tell us why your experience was \${Q2/ChoiceGroup/SelectedChoices}.

Please be as detailed as possible.

Three horizontal lines for text input.

End of Block: IITA experience

Start of Block: Rental property

Q19

We're looking for people to participate in some future research about residential rental property.

Please remember that your responses to the following questions are only available to Inland Revenue's customer research team and will be used for research purposes only.

Page Break

Q4 Do you own any residential rental property?

A residential rental property is a dwelling such as a house, apartment, flat, holiday home or other place of residence that earns rental income.

- Yes (1)
- No (2)

Page Break

Display This Question:

If Do you own any residential rental property? A residential rental property is a dwelling such as a... = Yes

Q5 When did you purchase your residential rental property?

If you have more than one, please select all that apply.

- Before 27th March 2021 (4)
- On or after 27th March 2021 (5)
- Can't recall (6)

---

Page Break

Display This Question:

If When did you purchase your residential rental property? If you have more than one, please select... = On or after 27th March 2021

Q6 Thinking about any residential rental property that you purchased on or after 27th March 2021, are any of the dwellings new builds?

Generally, a new build is a self-contained dwelling that received a Code Compliance Certificate (CCC) on or after 27th March 2020.

- Yes (4)
- No (5)
- Can't recall (6)

End of Block: Rental property

---

Start of Block: NZ challenges and issues block

Q15

**Lastly, we'd like to understand what's most important for you right now and how we can make sure that we're engaging with you about the things that matter to you.**

Page Break

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Q7 Which of the following do you think is the biggest challenge facing NZ right now?

- Inflation and cost of living (11)
  - Housing (12)
  - Healthcare (13)
  - Petrol prices (14)
  - The economy (15)
  - Poverty (16)
  - Crime (17)
  - Climate change and the environment (18)
  - Education (19)
  - COVID-19 pandemic (22)
  - Global issues (e.g. the war between Russia and Ukraine) (23)
  - Other, please specify (20)
- 
- Don't know (21)

Page Break

---



Q8 Thanks for your feedback today, we really appreciate your contributions through IR Connection.

In the future, what topics would you like to provide more feedback on?

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End of Block: NZ challenges and issues block

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# Go-Live – AutoCalc 2020 Individuals Questionnaire

Q1 Firstly please have a look at this image of an email.

**INSERT RECENT COMMUNICATION IMAGE HERE**

Do you recall receiving this email recently from Inland Revenue?

Yes	1	GO TO Q2
No	2	GO TO Q2c
Unsure	3	GO TO Q2c

**Initial action**

Q2 Which of these phrases best describes what you did after receiving the email?

*Please select one only.*

You deleted it before reading it	1	GO TO Q2c
You've still got it but haven't read it yet	2	GO TO Q2c
You've read it but didn't do anything	3	GO TO Q2a
You've read it and contacted (or tried to contact) Inland Revenue	4	GO TO Q2bi
You've read it and logged into myIR	5	GO TO Q3
Can't recall	6	GO TO Q2c

Q2a Please tell us your reason(s) for not doing anything about the email?

*Please select all that apply.*

I've been too busy to act on it	1	GO TO Q2c
I didn't know what to do	2	GO TO Q2c
I didn't think I needed to do anything	3	GO TO Q2c
I didn't know if the email was genuine / had concerns it was a scam	4	GO TO Q2c
I have tried to log in to myIR but have not yet managed to do so (e.g. forgot password/myIR didn't work)	5	GO TO Q6
Other (please tell us)	6	GO TO Q2c

Q2bi Why did you feel it was necessary to contact Inland Revenue?

*Please select all that apply.*

I couldn't remember my login details	1
I didn't know what the email was about	2
I didn't know what to do	3
Someone else handles my tax affairs so I was unsure why I received this email	4
I felt that some of the information in the assessment might have been incorrect (and didn't want to make changes myself)	5
I felt the information was sensitive and so wanted to talk to a person about it	6
I wanted to talk with a person to confirm the email was genuine / was not a scam	7
Other (please tell us)	8

Q2c Just to check, in the last week or so have you logged in to myIR to check your tax assessment for the tax year ending 31 March 2020?

Yes	1	GO TO Q3
No	2	GO TO Q6
Unsure	3	GO TO Q6

**Interacting on myIR**

Q3 Which of the following did you do in myIR?

*Please select all that apply.*

I read the information about my assessment on the myIR 'Home' page	1	
I clicked on the links on the myIR 'Home' page to learn more about my assessment	2	
I read the assessment letter	3	
I checked or updated my bank details on myIR	4	
I checked or updated my contact details on myIR (such as my email address)	5	
Paid my tax bill	6	
Other (please tell us)	7	
I didn't proceed any further and logged out	8	GOTO Q4

**ONLY ASK Q3Ai TO CUSTOMERS WHO HAVE TAX BILL TO PAY (FROM SAMPLE) AND CHECKED ASSESSMENT OR PAID TAX BILL (Q3=1,2,3,6)**

Q3ai If you had a tax bill to pay ... before checking your assessment were you expecting to receive a tax bill?

Yes – I knew I would have a tax bill to pay	1	GO TO Q3Aii
No – I thought I would not have a tax bill to pay	2	GOTO Q3Aii
I was uncertain	3	GO TO Q3Aii
Not relevant – I didn't have a tax bill to pay	4	GO TO Q3b

Q3aii Which of these statements best describes your knowledge of what caused the tax bill?

I was fully aware of the reasons (for example, I knew my income had changed during the year)	1
I was partly aware of the reasons	2
I was unsure about the reasons for the tax bill	3

**ONLY ASK Q3Aiii IF Q3Ai=1**

Q3Aiii Thinking back to your expectations about the amount you would have to pay ... would you say...

The amount you had to pay matched your expectations	1
The amount was higher than you expected	2
The amount was lower than you expected	3
I didn't have any expectations about the amount I would have to pay	4

**ONLY ASK Q3aiv TO CUSTOMERS WHO HAD A REFUND (FROM SAMPLE) AND CHECKED ASSESSMENT BILL (Q3=1,2,3)**

Q3aiv Thinking back to your expectations about the amount you were refunded ... would you say...

The size of the refund matched your expectations	1
The refund was higher than you expected	2
The refund was lower than you expected	3
I didn't have any expectations about the size of the refund	4
Not relevant – I didn't have a refund	5

**ONLY ASK Q3B IF Q3 CODE 3 IS SELECTED**

Q3b How much do you agree or disagree with these statements about the letter you received from Inland Revenue?

**RANDOMISE STATEMENTS**

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
The layout of the letter was clear	1	2	3	4	5
The content of the letter was easy to understand	1	2	3	4	5
I knew what I had to do next	1	2	3	4	5
It was clear what my refund or tax to pay was	1	2	3	4	5
I was reassured that the assessment described in the letter was correct	1	2	3	4	5

**NOW SKIP TO Q4**

**ONLY ASK Q3C IF Q3=1 OR 2**

Q3c How much do you agree or disagree with these statements about the information you got from myIR?

**RANDOMISE STATEMENTS**

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
The information about my tax assessment was clearly laid out	1	2	3	4	5
The information on myIR was easy to read	1	2	3	4	5
I knew what I had to do next	1	2	3	4	5
It was clear what my refund or tax to pay was	1	2	3	4	5
myIR provided me with reassurance that the assessment was correct	1	2	3	4	5

**What they did next (after logging on to myIR)**

Q4 After logging in to myIR to check your assessment, what did you do **next**?

*Please select all that apply.*

Contacted (or tried to contact) Inland Revenue	1
Paid my tax bill via my bank	2
Checked my bank account for the refund	3
Contacted a tax professional (e.g. accountant, tax agent, bookkeeper) for advice	4
Contacted friends or family for advice	5
Other (please tell us)	6
None of the above / nothing yet	7

**ONLY ASK Q4B IF Q4=7**

Q4b Which of the following best applies to you?

**ENABLE MULTICODING**

I didn't need to do anything because the refund was already paid into the correct bank account	1
I didn't need to do anything because there was no action required from me (e.g. no refund or bill to pay)	2
I intend to contact Inland Revenue soon	3
I intend to contact someone else for further advice soon	4
Something else (please tell us)	5
None of the above	6

**ASK Q5i IF Q4=1**

Q5i Why did you want to contact Inland Revenue?

*Please select all that apply.*

I found the assessment confusing	1
I wanted to provide the extra information requested to a person	2
I wanted to confirm how the amount was calculated	3
I was unsure if the amount was correct	4
I disagreed with Inland Revenue's assessment	5
I wanted to find out why I received the letter/email	6
I needed to speak to someone to be confident about the contents of the letter/email	7
Other (please tell us)	8

**General prompted awareness of auto-calc (to collect views from those who do not recall the email but still have views on auto-calc)**

Q6 Now we have some questions about recent changes Inland Revenue have made.

Just to check, are you aware that Inland Revenue **automatically calculates** your situation at the end of each tax year (you could be owed a refund, having more tax to pay, or neither because you paid the correct amount of tax during the year)?

Yes	1
No	2
Unsure	3

**Overall perceptions of auto-calc**

**IF Q6=2 OR Q6=3 THEN SKIP TO END NOW**

Q8 Thinking about the process whereby Inland Revenue automatically calculates your situation at the end of the tax year...

Overall, do you think that this process makes it easier or more difficult for you to manage your tax?

Much easier	1
Somewhat easier	2
Neither	3
Somewhat more difficult	4
Much more difficult	5
Unsure – don't know enough about it	6

**ONLY ASK Q8B IF Q8=1 or 2 or 4 or 5**

Q8b Can you tell us more about why you feel it is **[INSERT ANSWER FROM Q8]**?

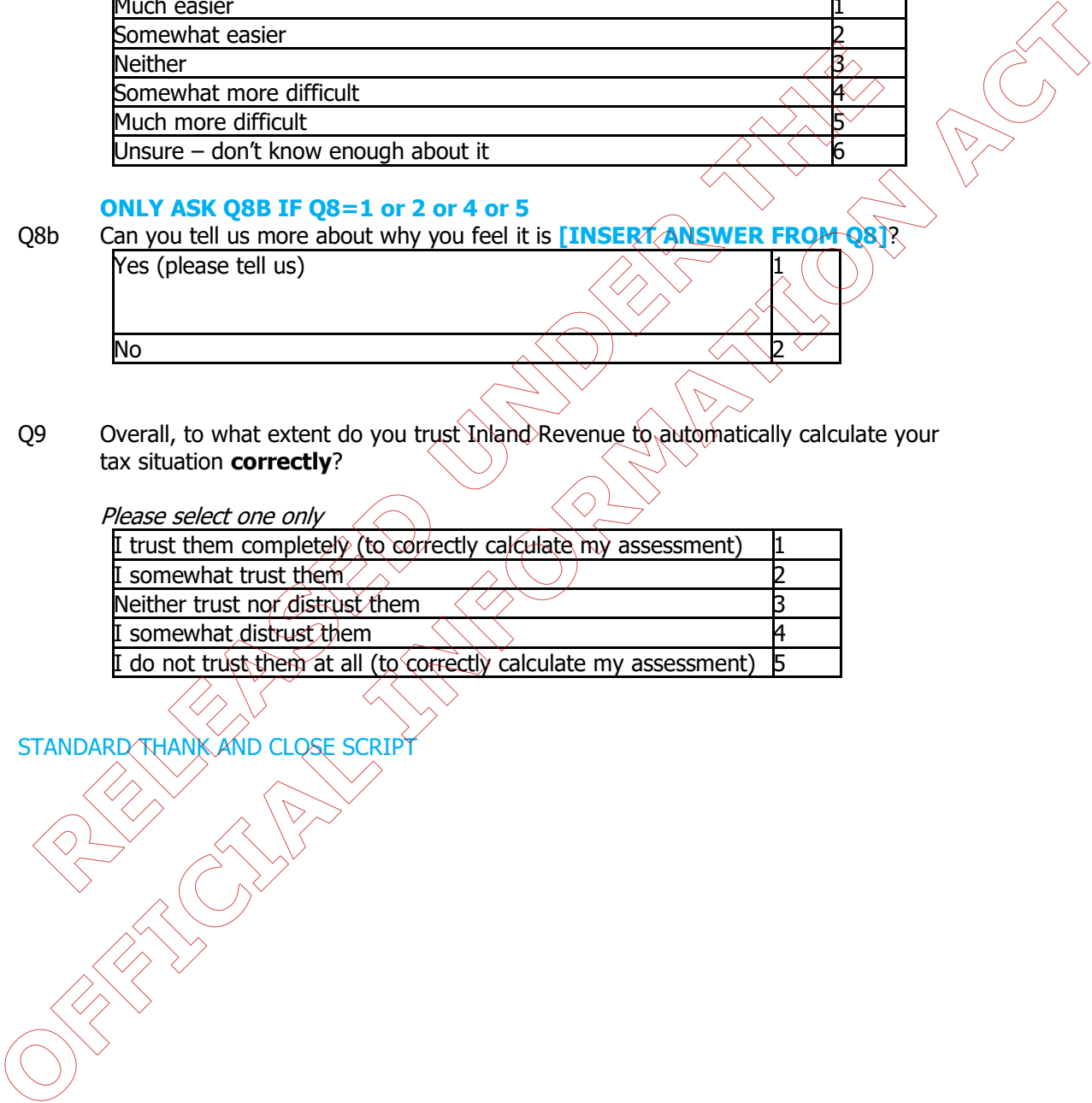
Yes (please tell us)	1
No	2

Q9 Overall, to what extent do you trust Inland Revenue to automatically calculate your tax situation **correctly**?

*Please select one only*

I trust them completely (to correctly calculate my assessment)	1
I somewhat trust them	2
Neither trust nor distrust them	3
I somewhat distrust them	4
I do not trust them at all (to correctly calculate my assessment)	5

STANDARD THANK AND CLOSE SCRIPT



**QUESTIONNAIRE INVESTMENT INCOME GO-LIVE SURVEY 2020:**

We're interested in your opinions about the recent changes to investment income reporting. Your feedback will help us continue to improve this service.

*We describe Investment Income as payments you make to someone in the form of interest, dividends, portfolio investment income (PIE), taxable Māori authority distributions, or royalties. Your involvement with investment income may include making one, some, or all of these types of payments.*

**Q1: Before today**, were you aware Inland Revenue introduced the following changes to the way investment income is reported by payers?

Select one answer in each row

	YES – aware before today	NO – not aware before today	Unsure
Nil returns are not required – filing is only required if a payment is made during the month	1	2	3
Information on recipients is required each time (where held) a return is filed (like date of birth, recipient contact details and details of any joint account holders)	1	2	3
Inland Revenue has created an electronic database of persons exempt from RWT – and this is available online	1	2	3

**ASK ALL:**

We're interested in your recent experience submitting investment income information to Inland Revenue.

**Q2:** Which method did you use when you last filed an investment income return for the 2021 tax year?

I manually entered the investment income return in myIR, <u>one customer at a time</u>	1
I uploaded <u>all</u> of our customers' investment income information in one file into myIR, using the file upload option.	2
Our software sent all the investment income information directly to Inland Revenue via the Gateway Channel	3
Someone else in the organisation filed on our behalf	4 <b>GO TO Q5</b>
Someone else filed on our behalf (e.g. a tax agent, other intermediary, a bureau or bookkeeper)	5 <b>GO TO Q5</b>

Q3. Thinking about your most recent experience filing investment income information, how easy or difficult was it to do what you needed to?

Very easy	1	<b>Go to Q3a</b>
Quite easy	2	<b>Go to Q3a</b>
Quite difficult	3	<b>Go to Q3b</b>
Very difficult	4	<b>Go to Q3b</b>
Don't know/Can't remember	5	<b>Go to Q5</b>

**Q3a: Ask if Q2 answer = quite easy or very easy:**

What was it that was easy? Please be as detailed as possible.

TEXT

**Q3b: Ask if Q2 answer = quite difficult or very difficult:**

What was it that was difficult? Please be as detailed as possible.

TEXT

**Q4: myIR CUSTOMERS ASK IF ANSWERED OPTION 1 AT Q2**

To what extent did you find the following parts of the investment income filing process in myIR easy or difficult?

	Very Difficult	Quite difficult	Neither easy or difficult	Quite easy	Very Easy	Doesn't apply to me
Finding where to start the return in myIR	1	2	3	4	5	6
Entering recipient details	1	2	3	4	5	6
Entering income information	1	2	3	4	5	6
Adding joint account holder information	1	2	3	4	5	6
Reviewing and confirming the return	1	2	3	4	5	6
Fixing any error messages	1	2	3	4	5	6
Making a payment in myIR	1	2	3	4	5	6
Printing off a confirmation	1	2	3	4	5	6

**ASK FILE UPLOAD CUSTOMERS: IF ANSWERED OPTION 2 AT Q2**



**Q4a:** To what extent did you find the following parts of the investment income filing process easy or difficult?

	Very Difficult	Quite difficult	Neither easy or difficult	Quite easy	Very Easy	Doesn't apply to me
Finding where to start the return in myIR	1	2	3	4	5	6
Preparing the file for uploading in myIR	1	2	3	4	5	6
Uploading the return file in myIR	1	2	3	4	5	6
Fixing any upload error messages	1	2	3	4	5	6
Reviewing and confirming the return	1	2	3	4	5	6
Making a payment in myIR	1	2	3	4	5	6
Printing off confirmation	1	2	3	4	5	6

**ASK IF GATEWAY CUSTOMERS: IF ANSWERED OPTION 3 AT Q2**

**Q4b:** To what extent did you find the following parts of the investment income filing process easy or difficult?

	Very Difficult	Quite difficult	Neither easy or difficult	Quite easy	Very Easy	Doesn't apply to me
Formatting the data so it meets Inland Revenue's specifications	1	2	3	4	5	6
Connecting to Inland Revenue's system	1	2	3	4	5	6
Submitting the return	1	2	3	4	5	6
Fixing any submission error messages	1	2	3	4	5	6
Receiving confirmation of successful submission	1	2	3	4	5	6

**Q5. Clarity of the information accessed.**

Thinking about the information you received from Inland Revenue on investment income filing changes:

How helpful was the information in helping you transition from the old way of filing to the new way of filing?

1. Very helpful
2. Quite helpful
3. Neither
4. Quite unhelpful
5. Very unhelpful
6. I haven't seen any information about the new filing/reporting process

**Q5a: ASK IF ANSWERED 3, 4 OR 5 At Q5, ELSE GO TO Q6**

What additional information would have helped?

**Q6:** Lastly, what one thing would you change to improve the investment income filing process?  
(Open ended).

**Thank You Page:** Thank you for taking the time to complete this survey

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# GO Live businesses

Q2 We're interested in the experience you've had using myIR. Your feedback will help us to continue improving this service.

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Q4 Thinking about when you most recently used myIR, which of the following were you there for? Please select all that apply.

- Income tax/Provisional tax (1)
  - GST (2)
  - Withholding tax (3)
  - Payroll or employee related matters (4)
  - Bank account details (5)
  - Filing a business tax return (6)
  - Filing employee information (e.g. payroll) (7)
  - Making or checking a payment to Inland Revenue (8)
  - Sending a message to Inland Revenue through myIR (9)
  - Checking the information Inland Revenue holds (10)
  - Responding to an alert saying to check something in myIR (11)
  - Updating my business details (12)
  - Changing information sent previously to Inland Revenue (13)
  - Requesting an action by Inland Revenue (14)
  - Seeking information (15)
  - Just browsing myIR with no particular query or action in mind (16)
  - Something else (please specify) (88)
- 
- Don't know/Can't remember (99)

*Skip To: Q11 If Thinking about when you most recently used myIR, which of the following were you there for? Pleas... = Don't know/Can't remember*

Q3 When you most recently used myIR, how easy or difficult was it to do what you needed?

- Very easy to do what I needed (1)
- Quite easy to do what I needed (2)
- Quite difficult to do what I needed (3)
- Very difficult to do what I needed (4)
- Don't know/Can't remember (99)

*Skip To: Q11 If When you most recently used myIR, how easy or difficult was it to do what you needed? = Don't know/Can't remember*

*Display This Question:*

*If When you most recently used myIR, how easy or difficult was it to do what you needed? = Quite difficult to do what I needed*

*Or When you most recently used myIR, how easy or difficult was it to do what you needed? = Very difficult to do what I needed*

Q12 Which things did you find difficult when you most recently used myIR? Please select all that apply.

- Understanding the language (1)
  - Finding my way around myIR (2)
  - Too many clicks to get where I wanted (3)
  - myIR did not give me all the information I needed (4)
  - Search tool was not helpful (5)
  - Process was not easy to understand (6)
  - I am not familiar with myIR (7)
  - Difficulties with the help function (8)
  - Information was not all in one place (9)
  - Instructions were not clear (10)
  - Understanding the financial details for my business (11)
  - Saving what I had done (12)
  - Knowing I had done things correctly (13)
  - Finding out what happens next (14)
  - Something else (please specify) (88)
- 
- Don't know/Can't remember (99)

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Display This Question:

*If When you most recently used myIR, how easy or difficult was it to do what you needed? = Very easy to do what I needed*

*Or When you most recently used myIR, how easy or difficult was it to do what you needed? = Quite easy to do what I needed*

Q13 Which things did you find easy when you most recently used myIR? Please select all that apply.

- Understanding the language (1)
  - Finding my way around myIR (2)
  - Just a few clicks to get where I wanted (3)
  - myIR gave me all the information I needed (4)
  - Search tool was helpful (5)
  - Process was easy to understand (6)
  - I am familiar with myIR (7)
  - The help function was useful (8)
  - Information was all in one place (9)
  - Instructions were clear (10)
  - Understanding the financial details for my business (11)
  - Saving what I had done (12)
  - Knowing I had done things correctly (13)
  - Finding out what happens next (14)
  - Something else (please specify) (88)
- 
- Don't know/Can't remember (99)



Q11 Still thinking about your most recent visit to myIR, how much do you agree or disagree that...?

	Strongly agree (1)	Agree (2)	Slightly agree (3)	Neither agree nor disagree (4)	Slightly disagree (5)	Disagree (6)	Strongly disagree (7)	Don't know/doesn't apply to me (99)
I felt confident that I was doing the right thing (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I felt reassured I got it right (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I knew what I needed to do next (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
It was easy to find the information I needed (4)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q12 Based on your most recent visit, what did you like about the changes we've made to myIR? (please be as detailed as possible)

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Q13 Lastly, what one thing could we improve, to make your experience of myIR even better?  
(please be as detailed as possible)

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# Go Live Child Support 2 - end of survey testing

Q1

Taking part in this research is voluntary, and we will keep all your answers confidential.

Q1a Was Child Support one of the reasons for your most recent visit to myIR?

- Yes (1)
- No (2)

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Q2 Thinking about when you most recently used myIR, which of the following were you there for? Please select all that apply.

- I had received an alert saying to go into myIR and check something (1)
  - Apply for Child Support (2)
  - Change something about my current Child Support calculation or arrangements (3)
  - Make a Child Support payment (4)
  - Check Working for Families as well as Child Support (5)
  - Find out information – such as payment due dates and amounts (6)
  - Just browse in the Child Support section of myIR (7)
  - Cancel the Child Support that an ex-partner was paying (8)
  - Waive an amount of money that was owed to me (9)
  - Object to something related to my Child Support (10)
  - Change the care arrangement for a child or children (11)
  - Something else [please specify] (88)
- 
- Don't know/can't remember (99)

Skip To: Q4 If Thinking about when you most recently used myIR, which of the following were you there for? Pleas... = Don't know/can't remember

Q3 When you most recently used myIR, how easy or difficult was it to do what you needed?

- Very easy to do what you needed (1)
- Quite easy to do what you needed (2)
- Quite difficult to do what you needed (3)
- Very difficult to do what you needed (4)
- Don't know / can't remember (99)

*Skip To: Q4 If When you most recently used myIR, how easy or difficult was it to do what you needed? = Don't know / can't remember*

*Display This Question:*

*If When you most recently used myIR, how easy or difficult was it to do what you needed? = Quite difficult to do what you needed*

*Or When you most recently used myIR, how easy or difficult was it to do what you needed? = Very difficult to do what you needed*

Q3a Which things did you find difficult when you most recently used myIR? Please select all that apply.

- Understanding the language (1)
  - Finding my way around myIR (2)
  - Too many clicks to get where I wanted (3)
  - myIR did not give me all the information I needed (4)
  - Search tool was not helpful (5)
  - Process was not easy to understand (6)
  - I am not familiar with myIR (7)
  - Information was not all in one place (8)
  - Instructions were not clear (9)
  - Updating my details (10)
  - Understanding the financial details for my Child Support situation (11)
  - Changing what I had done previously (12)
  - Saving what I had done (13)
  - Knowing I had done things correctly (14)
  - Finding out what happens next (15)
  - Something else (please specify) (88)
- 
- Don't know/Can't remember (99)

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Display This Question:

*If When you most recently used myIR, how easy or difficult was it to do what you needed? = Very easy to do what you needed*

*Or When you most recently used myIR, how easy or difficult was it to do what you needed? = Quite easy to do what you needed*

Q3b Which things did you find easy when you most recently used myIR? Please select all that apply

- Understanding the language (1)
  - Finding my way around myIR (2)
  - Just a few clicks to get where I wanted (3)
  - myIR gave me all the information I needed (4)
  - Search tool was helpful (5)
  - Process was easy to understand (6)
  - I am familiar with myIR (7)
  - Information was all in one place (8)
  - Instructions were clear (9)
  - Updating my details (10)
  - Understanding the financial details for my Child Support situation (11)
  - Changing what I had done previously (12)
  - Saving what I had done (13)
  - Knowing I had done things correctly (14)
  - Finding out what happens next (15)
  - Something else (please specify) (88)
- 
- Don't know/Can't remember (99)





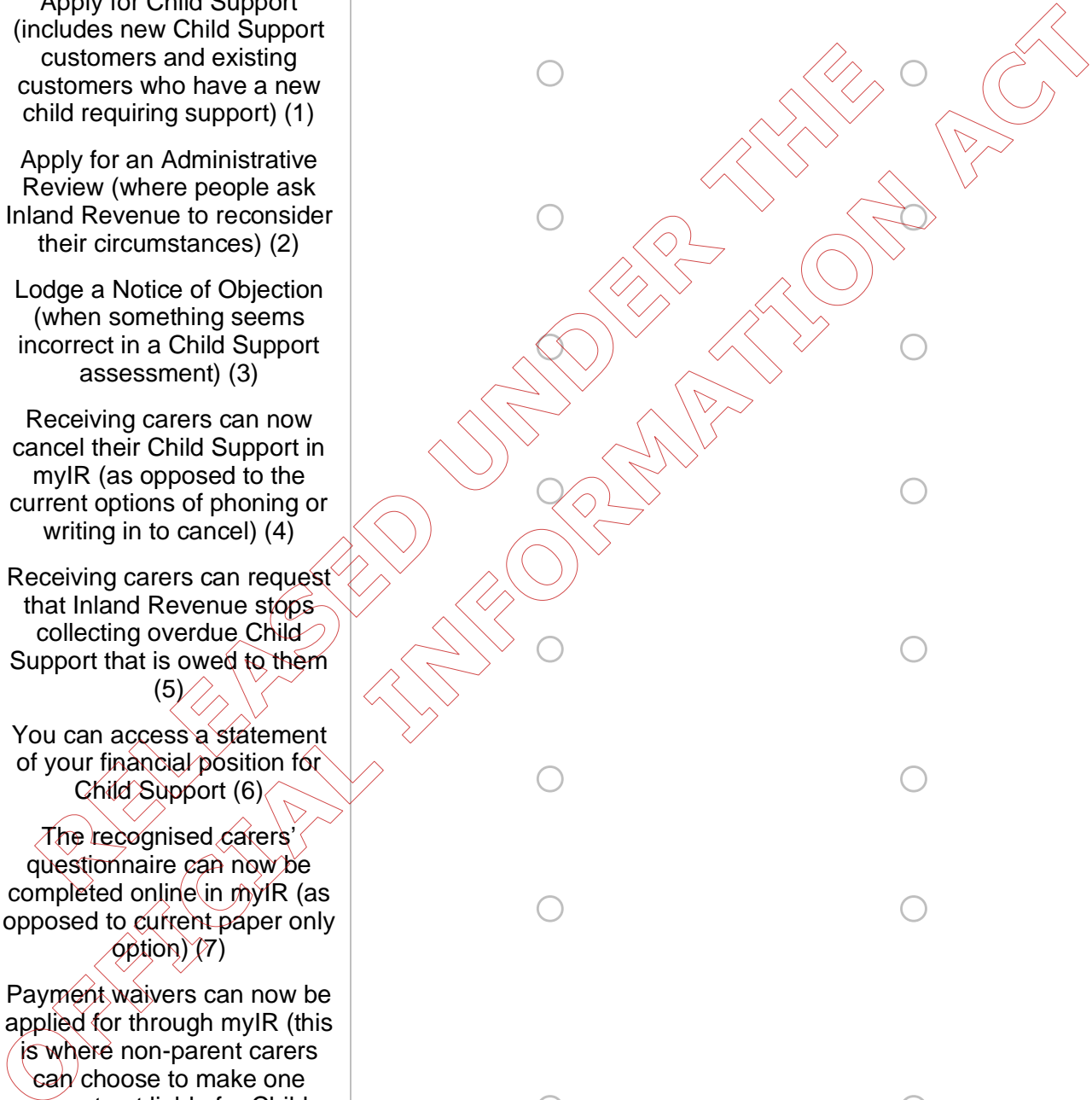
Q4 Still thinking about your most recent visit to myIR, how much do you agree or disagree that...?

	Strongly agree (1)	Agree (2)	Slightly agree (3)	Neither agree nor disagree (4)	Slightly disagree (5)	Disagree (6)	Strongly disagree (7)	Don't know/doesn't apply to me (99)
I felt confident that I was doing the right thing (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I felt reassured I got it right (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I knew what I needed to do next (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
It was easy to find the information I needed (4)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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Q5a The list below shows key things people can now do in myIR. Please indicate which ones you were aware can now be done in myIR

	Yes - I was aware this could now be done in myIR (1)	No - I wasn't aware this could now be done in myIR (2)
Apply for Child Support (includes new Child Support customers and existing customers who have a new child requiring support) (1)	<input type="radio"/>	<input type="radio"/>
Apply for an Administrative Review (where people ask Inland Revenue to reconsider their circumstances) (2)	<input type="radio"/>	<input type="radio"/>
Lodge a Notice of Objection (when something seems incorrect in a Child Support assessment) (3)	<input type="radio"/>	<input type="radio"/>
Receiving carers can now cancel their Child Support in myIR (as opposed to the current options of phoning or writing in to cancel) (4)	<input type="radio"/>	<input type="radio"/>
Receiving carers can request that Inland Revenue stops collecting overdue Child Support that is owed to them (5)	<input type="radio"/>	<input type="radio"/>
You can access a statement of your financial position for Child Support (6)	<input type="radio"/>	<input type="radio"/>
The recognised carers' questionnaire can now be completed online in myIR (as opposed to current paper only option) (7)	<input type="radio"/>	<input type="radio"/>
Payment waivers can now be applied for through myIR (this is where non-parent carers can choose to make one parent not liable for Child Support while still receiving payments from the other parent) (8)	<input type="radio"/>	<input type="radio"/>



*Skip To: Q7 If The list below shows key things people can now do in myIR. Please indicate which ones you were aw... [ No - I wasn't aware this could now be done in myIR] (Count) = 8*

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Page Break

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Q5b And have you used myIR to do any of these things (since November 1 this year, when it became possible)?

Display This Choice:

If The list below shows key things people can now do in myIR. Please indicate which ones you were aw... = Apply for Child Support (includes new Child Support customers and existing customers who have a new child requiring support) [ Yes - I was aware this could now be done in myIR ]

Display This Choice:

If The list below shows key things people can now do in myIR. Please indicate which ones you were aw... = Apply for an Administrative Review (where people ask Inland Revenue to reconsider their circumstances) [ Yes - I was aware this could now be done in myIR ]

Display This Choice:

If The list below shows key things people can now do in myIR. Please indicate which ones you were aw... = Lodge a Notice of Objection (when something seems incorrect in a Child Support assessment) [ Yes - I was aware this could now be done in myIR ]

Display This Choice:

If The list below shows key things people can now do in myIR. Please indicate which ones you were aw... = Receiving carers can now cancel their Child Support in myIR (as opposed to the current options of phoning or writing in to cancel) [ Yes - I was aware this could now be done in myIR ]

Display This Choice:

If The list below shows key things people can now do in myIR. Please indicate which ones you were aw... = Receiving carers can request that Inland Revenue stops collecting overdue Child Support that is owed to them [ Yes - I was aware this could now be done in myIR ]

Display This Choice:

If The list below shows key things people can now do in myIR. Please indicate which ones you were aw... = You can access a statement of your financial position for Child Support [ Yes - I was aware this could now be done in myIR ]

Display This Choice:

If The list below shows key things people can now do in myIR. Please indicate which ones you were aw... = The recognised carers' questionnaire can now be completed online in myIR (as opposed to current paper only option) [ Yes - I was aware this could now be done in myIR ]

Display This Choice:

If The list below shows key things people can now do in myIR. Please indicate which ones you were aw... = Payment waivers can now be applied for through myIR (this is where non-parent carers can choose to make one parent not liable for Child Support while still receiving payments from the other parent) [ Yes - I was aware this could now be done in myIR ]

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Page Break

*Display This Question:*  
 If And have you used myIR to do any of these things (since November 1 this year, when it became poss... [ Yes] (Count) >= 1

	Yes (1)	No (2)
<p><i>Display This Choice:</i>                      If The list below shows key things people can now do in myIR. Please indicate which ones you were aw... = Apply for Child Support (includes new Child Support customers and existing customers who have a new child requiring support) [ Yes - I was aware this could now be done in myIR ]</p> <p><b>I used myIR to apply for Child Support (1)</b></p>	<input type="radio"/>	<input type="radio"/>
<p><i>Display This Choice:</i>                      If The list below shows key things people can now do in myIR. Please indicate which ones you were aw... = Apply for an Administrative Review (where people ask Inland Revenue to reconsider their circumstances) [ Yes - I was aware this could now be done in myIR ]</p> <p><b>I used myIR to apply for an Administrative Review (2)</b></p>	<input type="radio"/>	<input type="radio"/>
<p><i>Display This Choice:</i>                      If The list below shows key things people can now do in myIR. Please indicate which ones you were aw... = Lodge a Notice of Objection (when something seems incorrect in a Child Support assessment) [ Yes - I was aware this could now be done in myIR ]</p> <p><b>I used myIR to lodge a Notice of Objection (3)</b></p>	<input type="radio"/>	<input type="radio"/>
<p><i>Display This Choice:</i>                      If The list below shows key things people can now do in myIR. Please indicate which</p>	<input type="radio"/>	<input type="radio"/>



ones you were aw... = Receiving carers can now cancel their Child Support in myIR (as opposed to the current options of phoning or writing in to cancel) [ Yes - I was aware this could now be done in myIR ]

I used myIR to cancel the Child Support I was receiving (4)

Display This Choice:

If The list below shows key things people can now do in myIR. Please indicate which ones you were aw... = Receiving carers can request that Inland Revenue stops collecting overdue Child Support that is owed to them [ Yes - I was aware this could now be done in myIR ]

I used myIR to request Inland Revenue to stop collecting overdue Child Support that was owed to me (5)

Display This Choice:

If The list below shows key things people can now do in myIR. Please indicate which ones you were aw... = You can access a statement of your financial position for Child Support [ Yes - I was aware this could now be done in myIR ]

I used myIR to access a statement of my financial position for Child Support (6)

Display This Choice:

If The list below shows key things people can now do in myIR. Please indicate which ones you were aw... = The recognised carers' questionnaire can now be completed online in myIR (as opposed to current paper only option) [ Yes - I was aware this could now be done in myIR ]

I used myIR to complete a

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Recognised carers'  
questionnaire (7)

*Display This Choice:*

*If The list below shows key things people can now do in myIR. Please indicate which ones you were aw... = Payment waivers can now be applied for through myIR (this is where non-parent carers can choose to make one parent not liable for Child Support while still receiving payments from the other parent) [ Yes - I was aware this could now be done in myIR ]*

I used myIR to waive a Child Support payment due to me  
(8)

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Q5c For you personally, would you say that being able to do the following in myIR makes it easier or more difficult for you to manage your Child Support?

*Display This Choice:*  
 If And have you used myIR to do any of these things (since November 1 this year, when it became poss... = I used myIR to apply for Child Support [ Yes ]

*Display This Choice:*  
 If And have you used myIR to do any of these things (since November 1 this year, when it became poss... = I used myIR to apply for an Administrative Review [ Yes ]

*Display This Choice:*  
 If And have you used myIR to do any of these things (since November 1 this year, when it became poss... = I used myIR to lodge a Notice of Objection [ Yes ]

*Display This Choice:*  
 If And have you used myIR to do any of these things (since November 1 this year, when it became poss... = I used myIR to cancel the Child Support I was receiving [ Yes ]

*Display This Choice:*  
 If And have you used myIR to do any of these things (since November 1 this year, when it became poss... = I used myIR to request Inland Revenue to stop collecting overdue Child Support that was owed to me [ Yes ]

*Display This Choice:*  
 If And have you used myIR to do any of these things (since November 1 this year, when it became poss... = I used myIR to access a statement of my financial position for Child Support [ Yes ]

*Display This Choice:*  
 If And have you used myIR to do any of these things (since November 1 this year, when it became poss... = I used myIR to complete a Recognised carers' questionnaire [ Yes ]

*Display This Choice:*  
 If And have you used myIR to do any of these things (since November 1 this year, when it became poss... = I used myIR to waive a Child Support payment due to me [ Yes ]

	A lot more difficult for me (1)	Slightly more difficult for me (2)	Slightly easier for me (3)	A lot easier for me (4)	Don't know (5)
<p><i>Display This Choice:</i>                      If And have you used myIR to do any of these things (since November 1 this year, when it became poss... = I used myIR to apply for Child Support [ Yes ]</p> <p>Using myIR to apply for Child Support is... (1)</p>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



Display This Choice:

If And have you used myIR to do any of these things (since November 1 this year, when it became poss... = I used myIR to apply for an Administrative Review [ Yes ]

Using myIR to apply for an Administrative Review is... (2)

Display This Choice:

If And have you used myIR to do any of these things (since November 1 this year, when it became poss... = I used myIR to lodge a Notice of Objection [ Yes ]

Using myIR to lodge a Notice of Objection is... (3)

Display This Choice:

If And have you used myIR to do any of these things (since November 1 this year, when it became poss... = I used myIR to cancel the Child Support I was receiving [ Yes ]

Using myIR to cancel the Child Support I was receiving is... (4)

Display This Choice:

If And have you used myIR to do any of these things (since November 1 this year, when it became poss... = I used myIR to request Inland Revenue to stop

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collecting overdue  
Child Support that  
was owed to me [ Yes  
]

Using myIR to  
request Inland  
Revenue stop  
collecting overdue  
Child Support that is  
owed to me is... (5)

Display This Choice:

If And have you  
used myIR to do any  
of these things (since  
November 1 this year,  
when it became  
poss... = I used myIR  
to access a statement  
of my financial  
position for Child  
Support [ Yes ]

Using myIR to  
access a statement  
of my financial  
position for Child  
Support is... (6)

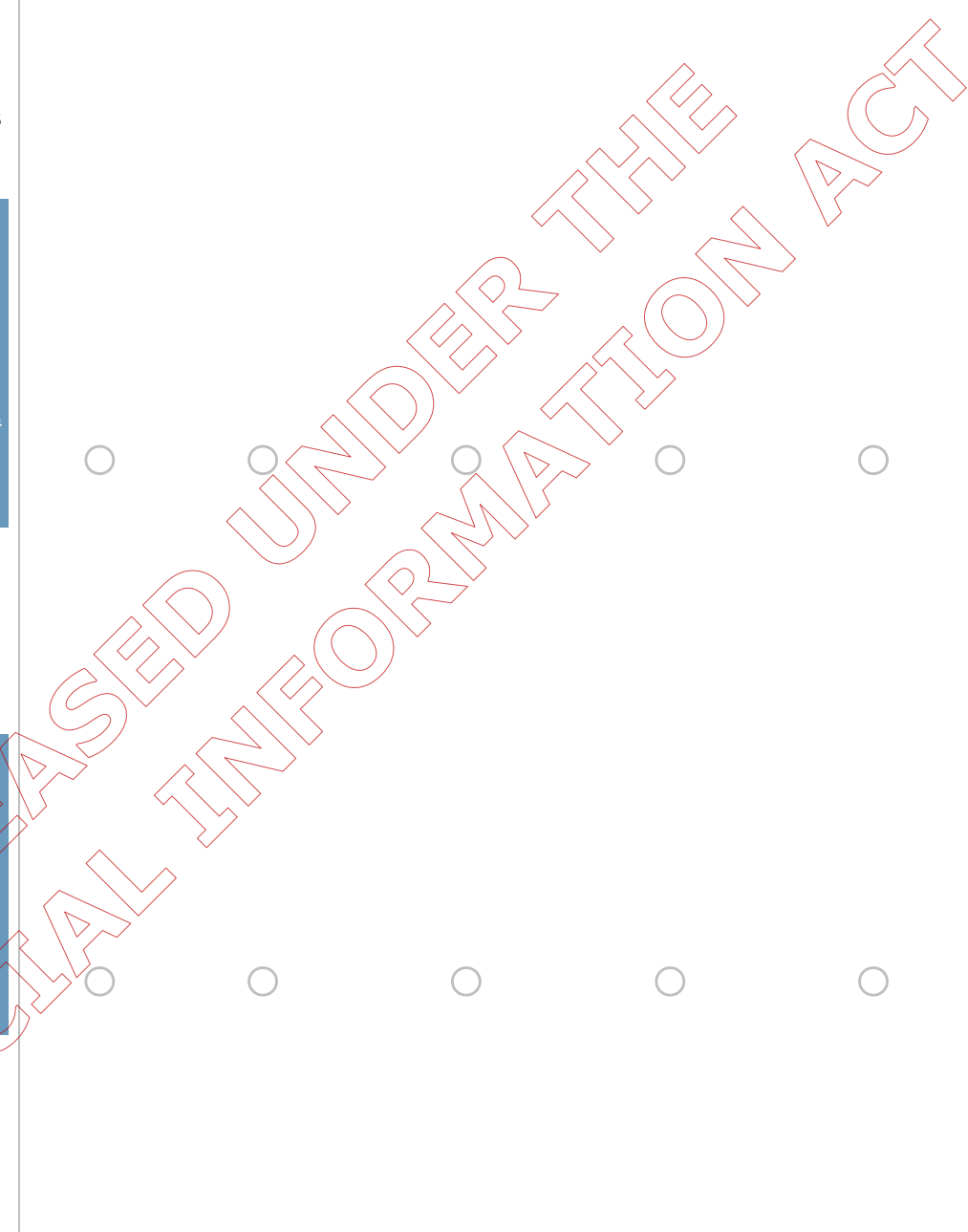
Display This Choice:

If And have you  
used myIR to do any  
of these things (since  
November 1 this year,  
when it became  
poss... = I used myIR  
to complete a  
Recognised carers'  
questionnaire [ Yes ]

Using myIR to  
complete a  
Recognised Carers'  
questionnaire is...  
(7)

Display This Choice:

If And have you  
used myIR to do any  
of these things (since  
November 1 this year,  
when it became  
poss... = I used myIR



to waive a Child  
Support payment due  
to me [ Yes ]

Using myIR to waive  
a Child Support  
payment due to me  
is... (8)

---

Page Break

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Q7 Based on your most recent visit, what did you like about the changes we've made to myIR?  
(Please be as detailed as possible)

Q8 Lastly, what one thing could we improve, to make your experience of myIR even better?  
(Please be as detailed as possible)

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## GO Live individuals

Q2 We're interested in the experience you've had using myIR. Your feedback will help us to continue improving this service.

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Q4 Thinking about when you most recently used myIR, which of the following were you there for? Please select all that apply.

- Student Loan – check or update details (1)
  - KiwiSaver – check or update details (2)
  - Working for Families – check, update, or register (3)
  - Child Support – check, update, or register (4)
  - Donation tax credits – check or submit information (5)
  - Income tax – check details or send in a return (6)
  - Bank account – check or update details (7)
  - Family details – check or update (8)
  - Sending a message to Inland Revenue through myIR (9)
  - Making a payment (10)
  - Responding to an alert saying to check something in myIR (11)
  - Requesting an action by Inland Revenue (12)
  - Seeking information (13)
  - Just browsing myIR with no particular query or action in mind (14)
  - Something else (please specify) (88)
- 
- Don't know/Can't remember (99)

Skip To: Q11 If Thinking about when you most recently used myIR, which of the following were you there for? Pleas... = Don't know/Can't remember

Q3 When you most recently used myIR, how easy or difficult was it to do what you needed?

- Very easy to do what I needed (1)
- Quite easy to do what I needed (2)
- Quite difficult to do what I needed (3)
- Very difficult to do what I needed (4)
- Don't know/Can't remember (99)

*Skip To: Q11 If When you most recently used myIR, how easy or difficult was it to do what you needed? = Don't know/Can't remember*

*Display This Question:*

*If When you most recently used myIR, how easy or difficult was it to do what you needed? = Quite difficult to do what I needed*

*Or When you most recently used myIR, how easy or difficult was it to do what you needed? = Very difficult to do what I needed*

Q12 Which things did you find difficult when you most recently used myIR? Please select all that apply.

- Understanding the language (1)
  - Finding my way around myIR (2)
  - Too many clicks to get where I wanted (3)
  - myIR did not give me all the information I needed (4)
  - Search tool was not helpful (5)
  - Language was not easy to understand (6)
  - Process was not easy to understand (7)
  - I am not familiar with myIR (8)
  - Information was not all in one place (9)
  - Instructions were not clear (10)
  - Updating my details (11)
  - Understanding the financial details for my situation (12)
  - Changing what I had done previously (13)
  - Saving what I had done (14)
  - Knowing I had done things correctly (15)
  - Finding out what happens next (16)
  - Something else (please specify) (88)
- 
- Don't know/Can't remember (99)



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*Display This Question:*

*If When you most recently used myIR, how easy or difficult was it to do what you needed? = Very easy to do what I needed*

*Or When you most recently used myIR, how easy or difficult was it to do what you needed? = Quite easy to do what I needed*

Q13 Which things did you find easy when you most recently used myIR? Please select all that apply.

- Understanding the language (1)
  - Finding my way around myIR (2)
  - Just a few clicks to get where I wanted (3)
  - myIR gave me all the information I needed (4)
  - Search tool was helpful (5)
  - Language was easy to understand (6)
  - Process was easy to understand (7)
  - I am familiar with myIR (8)
  - Information was all in one place (9)
  - Instructions were clear (10)
  - Updating my details (11)
  - Understanding the financial details for my situation (12)
  - Changing what I had done previously (13)
  - Saving what I had done (14)
  - Knowing I had done things correctly (15)
  - Finding out what happens next (16)
  - Something else (please specify) (88)
- 
- Don't know/Can't remember (99)

Q11 Still thinking about your most recent visit to myIR, how much do you agree or disagree that...?

	Strongly agree (1)	Agree (2)	Slightly agree (3)	Neither agree nor disagree (4)	Slightly disagree (5)	Disagree (6)	Strongly disagree (7)	Don't know/doesn't apply to me (99)
I felt confident that I was doing the right thing (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I felt reassured I got it right (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I knew what I needed to do next (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
It was easy to find the information I needed (4)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q12 Based on your most recent visit, what did you like about the changes we've made to myIR? (please be as detailed as possible)

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Q13 Lastly, what one thing could we improve, to make your experience of myIR even better?  
(please be as detailed as possible)

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## **GO Live Intermediaries**

We're interested in the experience you've had using myIR. Your feedback will help us to continue improving this service.

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Q1 Thinking about when you most recently used myIR, which of the following were you there for? Please select all that apply.

- Link or delink a client (1)
- Subscribe to a client (or unsubscribe) (2)
- Register a client for a new tax type (3)
- View a client's letter (4)
- Send a message about a client (5)
- View a breakdown of all a client's transactions (6)
- View a submission you have previously completed (7)
- View your agency EOT (8)
- Update staff logon access (9)
- View agency alerts (10)
- Run agency activity report (11)
- Run client list report (12)
- Run all client mail report (13)
- File a return on behalf of a client (14)
- Make a payment on behalf of a client (15)
- Check a payment made on behalf of a client (16)
- Make a change to information previously filed (17)
- You received an alert saying to go into myIR and check something (18)

- Seeking information (19)
  - Just browsing myIR with no particular query or action in mind (20)
  - Something else (please specify) (88)
- 
- Don't know/Can't remember (99)

*Skip To: Q11 If Thinking about when you most recently used myIR, which of the following were you there for? Pleas... = Don't know/Can't remember*

Q3 When you most recently used myIR for a tax intermediary related query or action, how easy or difficult was it to do what you needed?

- Very easy to do what I needed (1)
- Quite easy to do what I needed (2)
- Quite difficult to do what I needed (3)
- Very difficult to do what I needed (4)
- Don't know/Can't remember (99)

*Skip To: Q11 If When you most recently used myIR for a tax intermediary related query or action, how*

Display This Question:

If When you most recently used myIR for a tax intermediary related query or action, how easy or diff... = Quite difficult to do what I needed

Or When you most recently used myIR for a tax intermediary related query or action, how easy or diff... = Very difficult to do what I needed

Q12 Which things did you find difficult when you most recently used myIR? Please select all that apply.

- Understanding the language (1)
  - Finding my way around myIR (2)
  - Too many clicks to get where I wanted (3)
  - myIR did not give me all the information I needed (4)
  - Search tool was not helpful (5)
  - Process was not easy to understand (6)
  - I am not familiar with myIR (7)
  - Difficulties with the help function (8)
  - Information was not all in one place (9)
  - Instructions were not clear (10)
  - Understanding the financial details for my clients (11)
  - Saving what I had done (12)
  - Knowing I had done things correctly (13)
  - Finding out what happens next (14)
  - Something else (please specify) (88)
- 
- Don't know/Can't remember (99)



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Display This Question:

If When you most recently used myIR for a tax intermediary related query or action, how easy or diff... = Very easy to do what I needed

Or When you most recently used myIR for a tax intermediary related query or action, how easy or diff... = Quite easy to do what I needed

Q13 Which things did you find easy when you most recently used myIR? Please select all that apply.

- Understanding the language (1)
  - Finding my way around myIR (2)
  - Just a few clicks to get where I wanted (3)
  - myIR gave me all the information I needed (4)
  - Search tool was helpful (5)
  - Process was easy to understand (6)
  - I am familiar with myIR (7)
  - The help function was useful (8)
  - Information was all in one place (9)
  - Instructions were clear (10)
  - Understanding the financial details for my clients (11)
  - Saving what I had done (12)
  - Knowing I had done things correctly (13)
  - Finding out what happens next (14)
  - Something else (please specify) (88)
- 
- Don't know/Can't remember (99)

Q11 Still thinking about your most recent visit to myIR, how much do you agree or disagree that...?

	Strongly agree (1)	Agree (2)	Slightly agree (3)	Neither agree nor disagree (4)	Slightly disagree (5)	Disagree (6)	Strongly disagree (7)	Don't know/doesn't apply to me (99)
I felt confident that I was doing the right thing (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I felt reassured I got it right (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I knew what I needed to do next (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
It was easy to find the information I needed (4)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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Q9 The list below shows some of the new things people can now do in myIR. Please indicate which ones you were aware could now be done in myIR.

	Yes - I was aware this could now be done in myIR (1)	No - I wasn't aware this could now be done in myIR (2)
Create a 'manage favourites list' for managing your clients (can list up to 50 clients) (1)	<input type="radio"/>	<input type="radio"/>
Search for clients by name (as well as searching by IRD number or customer identifier) (2)	<input type="radio"/>	<input type="radio"/>
Use the Intermediaries Centre (the new Tax Preparer tab) to complete tasks and view alerts or notifications on behalf of your clients (to do this you need to subscribe to those clients in myIR) (3)	<input type="radio"/>	<input type="radio"/>
Alerts can now be filtered by account type or task (4)	<input type="radio"/>	<input type="radio"/>
History tab now shows the client accounts you have accessed in your current myIR session (5)	<input type="radio"/>	<input type="radio"/>
Return to the most recent client without going into your favourites list or the Intermediaries Centre by clicking the record box at top left of the screen (6)	<input type="radio"/>	<input type="radio"/>

Skip To: Q12 If The list below shows some of the new things people can now do in myIR. Please indicate which ones... [No - I wasn't aware this could now be done in myIR] (Count) = 6

Q10 And have you used myIR to do this action (since November 1 this year when it became possible)?

*Display This Choice:*

*If The list below shows some of the new things people can now do in myIR. Please indicate which ones... = Create a 'manage favourites list' for managing your clients (can list up to 50 clients) [ Yes - I was aware this could now be done in myIR ]*

*Display This Choice:*

*If The list below shows some of the new things people can now do in myIR. Please indicate which ones... = Search for clients by name (as well as searching by IRD number or customer identifier) [ Yes - I was aware this could now be done in myIR ]*

*Display This Choice:*

*If The list below shows some of the new things people can now do in myIR. Please indicate which ones... = Use the Intermediaries Centre (the new Tax Preparer tab) to complete tasks and view alerts or notifications on behalf of your clients (to do this you need to subscribe to those clients in myIR) [ Yes - I was aware this could now be done in myIR ]*

*Display This Choice:*

*If The list below shows some of the new things people can now do in myIR. Please indicate which ones... = Alerts can now be filtered by account type or task [ Yes - I was aware this could now be done in myIR ]*

*Display This Choice:*

*If The list below shows some of the new things people can now do in myIR. Please indicate which ones... = History tab now shows the client accounts you have accessed in your current myIR session [ Yes - I was aware this could now be done in myIR ]*

*Display This Choice:*

*If The list below shows some of the new things people can now do in myIR. Please indicate which ones... = Return to the most recent client without going into your favourites list or the Intermediaries Centre by clicking the record box at top left of the screen [ Yes - I was aware this could now be done in myIR ]*

	Yes (1)	No (2)
<p><i>Display This Choice:</i></p> <p><i>If The list below shows some of the new things people can now do in myIR. Please indicate which ones... = Create a 'manage favourites list' for managing your clients (can list up to 50 clients) [ Yes - I was aware this could now be done in myIR ]</i></p> <p><b>I created a 'manage favourites list' for managing my clients (1)</b></p>	<input type="radio"/>	<input type="radio"/>
<p><i>Display This Choice:</i></p> <p><i>If The list below shows some of the new things people can now do in myIR. Please indicate which ones... = Search for clients by name (as well as searching by IRD number or customer identifier) [ Yes - I was aware this could now be done in myIR ]</i></p> <p><b>I searched for clients by name in myIR (2)</b></p>	<input type="radio"/>	<input type="radio"/>
<p><i>Display This Choice:</i></p> <p><i>If The list below shows some of the new things people can now do in myIR. Please indicate which ones... = Use the Intermediaries Centre (the new Tax Preparer tab) to complete tasks and view alerts or notifications on behalf of your clients (to do this you need to subscribe to those clients in myIR) [ Yes - I was aware this could now be done in myIR ]</i></p> <p><b>I used the Intermediaries Centre (the new Tax Preparer tab) to complete tasks and view alerts and notifications on behalf of my clients (that I was subscribed to) (3)</b></p>	<input type="radio"/>	<input type="radio"/>

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*Display This Choice:*

*If The list below shows some of the new things people can now do in myIR. Please indicate which ones... = Alerts can now be filtered by account type or task [ Yes - I was aware this could now be done in myIR ]*

**I filtered alerts account type or task (4)**

*Display This Choice:*

*If The list below shows some of the new things people can now do in myIR. Please indicate which ones... = History tab now shows the client accounts you have accessed in your current myIR session [ Yes - I was aware this could now be done in myIR ]*

**I used the History tab to see the client accounts I had accessed in a myIR session (5)**

*Display This Choice:*

*If The list below shows some of the new things people can now do in myIR. Please indicate which ones... = Return to the most recent client without going into your favourites list or the Intermediaries Centre by clicking the record box at top left of the screen [ Yes - I was aware this could now be done in myIR ]*

**I returned to the most recent client without going into my favourites list or the Intermediaries Centre by clicking the record box at top left of the screen (6)**

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Display This Question:

If And have you used myIR to do this action (since November 1 this year when it became possible)? [ Yes] (Count) >= 1

Q11 For you personally, would you say that being able to do this in myIR makes it easier or more difficult for you to manage your clients' tax matters?

Display This Choice:

If And have you used myIR to do this action (since November 1 this year when it became possible)? = I created a 'manage favourites list' for managing my clients [ Yes ]

Display This Choice:

If And have you used myIR to do this action (since November 1 this year when it became possible)? = I searched for clients by name in myIR [ Yes ]

Display This Choice:

If And have you used myIR to do this action (since November 1 this year when it became possible)? = I used the Intermediaries Centre (the new Tax Preparer tab) to complete tasks and view alerts and notifications on behalf of my clients (that I was subscribed to) [ Yes ]

Display This Choice:

If And have you used myIR to do this action (since November 1 this year when it became possible)? = I filtered alerts account type or task [ Yes ]

Display This Choice:

If And have you used myIR to do this action (since November 1 this year when it became possible)? = I used the History tab to see the client accounts I had accessed in a myIR session [ Yes ]

Display This Choice:

If And have you used myIR to do this action (since November 1 this year when it became possible)? = I returned to the most recent client without going into my favourites list or the Intermediaries Centre by clicking the record box at top left of the screen [ Yes ]

A lot more difficult for me (1)

Slightly more difficult for me (2)

Slightly easier for me (3)

A lot easier for me (4)

Don't know (5)

Display This Choice:

If And have you used myIR to do this action (since November 1 this year when it became possible)? = I created a 'manage favourites list' for managing my clients [ Yes ]






Creating a 'manage favourites list' is... (1)



Display This Choice:

If And have you used myIR to do this action (since November 1 this year when it became possible)? = I searched for clients by name in myIR [ Yes ]

Searching for clients by name is... (2)

Display This Choice:

If And have you used myIR to do this action (since November 1 this year when it became possible)? = I used the Intermediaries Centre (the new Tax Preparer tab) to complete tasks and view alerts and notifications on behalf of my clients (that I was subscribed to) [ Yes ]

Using the Intermediaries Centre to complete tasks and view alerts and notifications on behalf of my clients is... (3)

Display This Choice:

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*If And have you used myIR to do this action (since November 1 this year when it became possible)? = I filtered alerts account type or task [ Yes ]*

**Filtering alerts account type or task is... (4)**

*Display This Choice:*

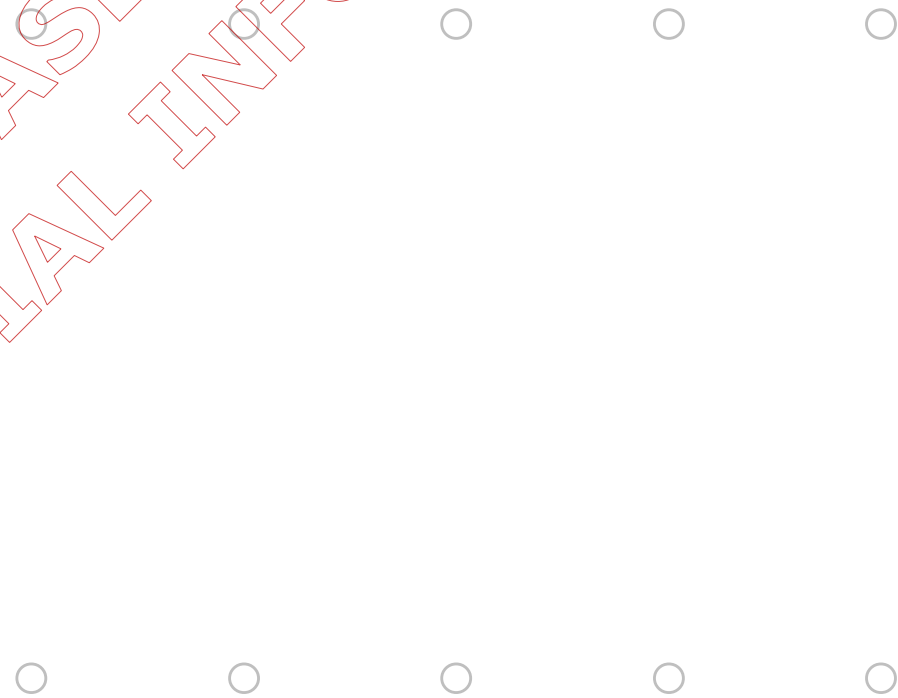
*If And have you used myIR to do this action (since November 1 this year when it became possible)? = I used the History tab to see the client accounts I had accessed in a myIR session [ Yes ]*

**Using the History tab to see the client accounts I had accessed in a myIR session is... (5)**

*Display This Choice:*

*If And have you used myIR to do this action (since November 1 this year when it became possible)? = I returned to the most recent client without going into my*

OFFICIAL INFORMATION ACT UNDER THE



*favourites list  
or the  
Intermediaries  
Centre by  
clicking the  
record box at  
top left of the  
screen [ Yes ]*

Returning to  
the most  
recent client  
without going  
into my  
favourites list  
or the  
Intermediaries  
Centre by  
clicking the  
record box  
is... (6)

Q12 Based on your most recent visit, what did you like about the changes we've made to myIR?  
(please be as detailed as possible)

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Q13 Lastly, what one thing could we improve, to make your experience of myIR even better?  
(please be as detailed as possible)

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OFFICIAL INFORMATION ACT  
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# Survey: GoLive R4 AutoCalc - Paper Assessments

Created on: Jun 10, 2020 12:12 PM

Last modified on: Nov 30, 2020 8:44 AM

Page 1

## Page Skip Logic:

Go to Page 11 when Any of the following conditions are met

Do you recall receiving this letter recently from Inland Revenue? Equals No, Unsure

Firstly, please have a look at this image of a tax assessment letter.



ird.govt.nz

Income tax assessment issued under the Tax Administration Act 1994

**Income tax assessment**  
for year ended 31 March 2020

**Your account balance is**  
**\$0.00**

### Why you are getting this

The end of tax year income tax assessment process is automated. This notice tells you how we've calculated your tax based on the information we hold for you.

### You do not need to do anything

You do not need to do anything as you have no tax to pay.

### Your assessment details

Your income tax calculation is shown further in this letter.

Question: Do you recall receiving this letter recently from Inland Revenue?

Yes
No
Unsure

Page 2

Question: Which of these phrases best describes what you did after receiving the letter? Please select one only.

You've still got it but haven't read it yet
You've read it
You binned it without reading it
Can't recall
Other (please tell us)

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Page Skip Logic:

Go to Page 7 when Any of the following conditions are met

If you had a tax bill to pay... before checking your assessment, were you expecting to receive a tax bill?

Equals Not relevant – I didn't have a tax bill to pay

Display Logic:

Show this item when All of the following conditions are met:

Which of these phrases best describes what you did after receiving the letter? Please select one only.

Equals You've read it, Other (please tell us)

acrpt\_auto\_calc\_result Equals DEBIT

acrpt\_auto\_write\_off Equals false

Question: If you had a tax bill to pay... before checking your assessment, were you expecting to receive a tax bill?

Yes – I knew I would have a tax bill to pay
No – I thought I would not have a tax bill to pay
I was uncertain
Not relevant – I didn't have a tax bill to pay

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Display Logic:

Show this item when All of the following conditions are met:

Which of these phrases best describes what you did after receiving the letter? Please select one only.

Equals You've read it, Other (please tell us)

acprt\_auto\_calc\_result Equals DEBIT

acprt\_auto\_write\_off Equals false

Question: Which of these statements best describes your knowledge of what caused the tax bill?

I was fully aware of the reasons (for example, I knew my income had changed during the year)
I was partly aware of the reasons
I was unsure about the reasons for the tax bill

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Display Logic:

Show this item when All of the following conditions are met:

If you had a tax bill to pay... before checking your assessment, were you expecting to receive a tax bill?

Equals Yes – I knew I would have a tax bill to pay

acprt\_auto\_calc\_result Equals DEBIT

acprt\_auto\_write\_off Equals false

Question: Thinking back to your expectations about the amount you would have to pay, would you say...

The amount you had to pay matched your expectations
The amount was higher than you expected
The amount was lower than you expected
I didn't have any expectations about the amount I would have to pay

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Display Logic:

Show this item when All of the following conditions are met:

Which of these phrases best describes what you did after receiving the letter? Please select one only.

Equals You've read it, Other (please tell us)

acprt\_auto\_calc\_result Equals CREDIT

Question: Thinking back to your expectations about the amount you were refunded, would you say...

The size of the refund matched your expectations
The refund was higher than you expected
The refund was lower than you expected
I didn't have any expectations about the size of the refund
Not relevant – I didn't have a refund

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Display Logic:

Show this item when the following condition is met:

Which of these phrases best describes what you did after receiving the letter? Please select one only.

Equals You've read it, Other (please tell us)

BEGIN Table

Question: How much do you agree or disagree with these statements about the letter you received from Inland Revenue?

Table Sub-Question: The layout of the letter was clear

Strongly disagree
Disagree
Neither agree nor disagree
Agree
Strongly agree

Table Sub-Question: The content of the letter was easy to understand

Strongly disagree
Disagree
Neither agree nor disagree
Agree
Strongly agree

Table Sub-Question: I knew what I had to do next

Strongly disagree
Disagree
Neither agree nor disagree
Agree
Strongly agree

Table Sub-Question: It was clear what my refund or tax to pay was

Strongly disagree
Disagree
Neither agree nor disagree
Agree
Strongly agree

Table Sub-Question: I was reassured that the assessment described in the letter was correct

Strongly disagree
Disagree
Neither agree nor disagree
Agree
Strongly agree

END Table of How much do you agree or disagree with these statements about the letter you received from Inland Revenue?

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Question: After receiving the letter, did you contact (or try to contact) any of the following to discuss your assessment / obtain advice? Please select all that apply.

Inland Revenue
A tax professional (e.g. accountant, tax agent, bookkeeper)
Friends or family
None of the above / nothing yet
Other (please tell us)

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Display Logic:

Show this item when the following condition is met:

After receiving the letter, did you contact (or try to contact) any of the following to discuss your assessment / obtain advice? Please select all that apply. Includes Inland Revenue

Question: Why did you want to contact Inland Revenue? Please select all that apply.

I found the assessment confusing
I didn't know what to do
I wanted to find out why I received the letter
I needed to speak to a person to be confident about the contents of the letter
I wanted to talk with a person to confirm the letter was genuine
I wanted to confirm how the amount was calculated
I felt some of the information was incorrect
I disagreed with Inland Revenue's assessment
Someone else handles my tax affairs so I was unsure why I received this letter
Other (please tell us)

RELEASED UNDER THE OFFICIAL INFORMATION ACT

Question: After receiving the letter, did you do any of the following?

Paid my tax bill via my bank
Checked my bank account for the refund
Neither (e.g. nothing was required from me)

RELEASED UNDER THE  
OFFICIAL INFORMATION ACT

Page Skip Logic:

Go to Page 15 when Any of the following conditions are met

Now we have some questions about the recent changes Inland Revenue have made. Just to check, are you aware that Inland Revenue automatically calculates your situation at the end of each tax year (you could be owed a refund, having more tax to pay, or neither because you paid the correct amount of tax during the year)? Equals No, Unsure

Question: Now we have some questions about the recent changes Inland Revenue have made. Just to check, are you aware that Inland Revenue automatically calculates your situation at the end of each tax year (you could be owed a refund, having more tax to pay, or neither because you paid the correct amount of tax during the year)?

Yes
No
Unsure

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Question: Thinking about the process whereby Inland Revenue automatically calculates your situation at the end of the tax year... Overall, do you think that this process makes it easier or more difficult for you to manage your tax?

Much easier
Somewhat easier
Neither
Somewhat more difficult
Much more difficult
Unsure – don't know enough about it

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Display Logic:

Show this item when the following condition is met:

Thinking about the process whereby Inland Revenue automatically calculates your situation at the end of the tax year... Overall, do you think that this process makes it easier or more difficult for you to manage your tax? Equals Much easier, Somewhat easier, Somewhat more difficult, Much more difficult

Question: Can you tell us more about why you feel it is [ease]?

No
Yes (please tell us)

RELEASED UNDER THE OFFICIAL INFORMATION ACT

Question: Overall, to what extent do you trust Inland Revenue to automatically calculate your tax situation correctly? Please select one only.

I trust them completely (to correctly calculate my assessment)
I somewhat trust them
Neither trust nor distrust them
I somewhat distrust them
I do not trust them at all (to correctly calculate my assessment)

RELEASED UNDER THE OFFICIAL INFORMATION ACT

Page Skip Logic:

Go to Page 18 when Any of the following conditions are met

myIR is a service where you can manage your tax online. Once you're registered, you receive electronic notifications to log onto myIR whenever there is new information or requests from Inland Revenue (and you no longer receive paper statements). Before today, had you heard of myIR? Equals No, Unsure

Question: myIR is a service where you can manage your tax online. Once you're registered, you receive electronic notifications to log onto myIR whenever there is new information or requests from Inland Revenue (and you no longer receive paper statements). Before today, had you heard of myIR?

Yes
No
Unsure

RELEASED UNDER THE OFFICIAL INFORMATION ACT

Question: According to our records, you receive your tax assessment by post (rather than through myIR). How likely are you to register with myIR over the next year?

Very likely
Fairly likely
Fairly unlikely
Very unlikely
Unsure
Not relevant – I am already registered with myIR

RELEASED UNDER THE OFFICIAL INFORMATION ACT

Display Logic:

Show this item when the following condition is met:

According to our records, you receive your tax assessment by post (rather than through myIR). How likely are you to register with myIR over the next year? Equals Fairly unlikely, Very unlikely

Question: For what reasons are you unlikely to register with myIR? Please select all that apply.

CONCERNS WITH AN ONLINE SERVICE GENERALLY

You'd worry about making a mistake when using an online service for tax
You don't feel comfortable / confident using a computer / an online service
You are worried about scammers / hackers
Your tax circumstances are too complicated to deal with online
Your tax circumstances are simple / straightforward so there is no need to register with myIR

Display Logic:

Show this item when the following condition is met:

According to our records, you receive your tax assessment by post (rather than through myIR). How likely are you to register with myIR over the next year? Equals Fairly unlikely, Very unlikely

Question: CONCERNS WITH myIR

You are worried about forgetting / losing your user-name / password
myIR looks complex / confusing / difficult to navigate
myIR does not work well on a phone screen

Display Logic:

Show this item when the following condition is met:

According to our records, you receive your tax assessment by post (rather than through myIR). How likely are you to register with myIR over the next year? Equals Fairly unlikely, Very unlikely

Question: ACCESS TO TECHNOLOGY

You don't have easy access to a computer / smartphone / tablet
You have access to a computer / smartphone / tablet but have limited access to the Internet (or have to pay each time you use the Internet)
You'd rather print things out regarding tax but you do not have a printer

Display Logic:

Show this item when the following condition is met:

According to our records, you receive your tax assessment by post (rather than through myIR). How likely are you to register with myIR over the next year? Equals Fairly unlikely, Very unlikely

Question: PREFER OTHER APPROACHES

You enjoy doing things yourself on paper (for example, you enjoy filling in the form / you like having a physical record)
You'd always want to speak to a person anyway when it comes to tax

Display Logic:

Show this item when the following condition is met:

According to our records, you receive your tax assessment by post (rather than through myIR). How likely are you to register with myIR over the next year? Equals Fairly unlikely, Very unlikely

Question: OTHER REASONS

You don't know much about myIR
You are too busy to register with myIR
Unsure
Other (please tell us)

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Question: If you have any other comments on the process of tax assessment or how it can be improved, please let us know below. (Optional)

Long text from respondent

Thank You Page

Thank you for your time and willingness to participate in this survey.

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## Survey: Hidden economy

Created on: May 10, 2016 3:11 AM

Last modified on: Oct 15, 2020 12:54 PM

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Page 1

Question: Respondent ID

Short text from respondent
----------------------------

Question: Weighting

Select Number from respondent
-------------------------------

Question: Q1) Gender

male
female

Question: Q2) First of all, could you tell me which of the following age groups you fall into?

18-24
25-34
35-44
45-54
55-64
65-74
75 and over

Question: Q3) In which of the following areas do you live?

Northland
Auckland
Waikato
Bay of Plenty
Gisborne
Hawke's Bay
Taranaki
Manawatu-Wanganui
Wellington-Wairarapa
Tasman
Nelson
Marlborough
West Coast
Canterbury
Otago

Southland

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OFFICIAL INFORMATION ACT

BEGIN Table

Question: Q4) And which ethnic group do you belong to? (if necessary, you can belong to more than one)

CODE MANY

Table Sub-Question: New Zealand european (or Pakeha)

Yes
No

Table Sub-Question: Maori

Yes
No

Table Sub-Question: Pacific

Yes
No

Table Sub-Question: Asian

Yes
No

Table Sub-Question: Middle East/Latin American/African

Yes
No

Table Sub-Question: Refused

Yes
No

Table Sub-Question: Other Ethnic group

Yes
No

END Table of Q4) And which ethnic group do you belong to? (if necessary, you can belong to more than one) CODE MANY

Question: Q4CRverb Verbatim for 'other' ethnic group

Short text from respondent
----------------------------

BEGIN Table

Question: Q5) And are you....? Read Code many

Table Sub-Question: An employer

Yes
No

Table Sub-Question: Self employed

Yes
No

Table Sub-Question: A salary or wage earner

Yes
No

Table Sub-Question: Retired

Yes
No

Table Sub-Question: A full time home maker

Yes
No

Table Sub-Question: A student

Yes
No

Table Sub-Question: Unemployed

Yes
No

Table Sub-Question: Other beneficiary

Yes
No

Table Sub-Question: Refused

Yes
No

END Table of Q5) And are you....? Read Code many

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Question: Q6

Answer (specify)
Don't know/no opinion

BEGIN Table

Question: Q6) The next few questions are about cash jobs. By this I mean paying someone cash for a job they do, or being paid in cash for a job that you do. What are your views on cash jobs? Probe for clear answer. Prompt if necessary: By 'cash jobs' I mean under the table.

Table Sub-Question: Cash jobs are acceptable (general comment)

Yes
No

Table Sub-Question: Cash jobs are acceptable, but it depends on the size of the job/what it's worth

Yes
No

Table Sub-Question: Cash jobs are acceptable, but it depends who is doing it (friend, family member, school kid etc.)

Yes
No

Table Sub-Question: Cash jobs are acceptable, but it depends how regularly it occurs

Yes
No

Table Sub-Question: Cash jobs are acceptable/understandable in today's economic climate (people need the money)

Yes
No

Table Sub-Question: Cash jobs are acceptable because we pay too much tax

Yes
No

Table Sub-Question: Cash jobs are commonplace

Yes
No

Table Sub-Question: Link to tax – people should pay tax

Yes
No

Table Sub-Question: Cash jobs are not acceptable (link to society – less money for essential services/increases costs for the rest of us)

Yes
No

Table Sub-Question: I don't do it (do not personally participate in hidden economy)

Yes
No

Table Sub-Question: Cash jobs are illegal

Yes
No

Table Sub-Question: Cash jobs are not acceptable (general comment)

Yes
No

Table Sub-Question: Cash jobs save you money/are cheaper

Yes
No

Table Sub-Question: Other


Yes
No

Table Sub-Question: Neutral/No opinion/Don't know

Yes
No

END Table of Q6) The next few questions are about cash jobs. By this I mean paying someone cash for a job they do, or being paid in cash for a job that you do. What are your views on cash jobs? Probe for clear answer. Prompt if necessary: By 'cash jobs' I mean under the table.

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OFFICIAL INFORMATION ACT



Question: Q6#CRverb Verbatim for Q6- 'other' responses

Long text from respondent
---------------------------

BEGIN Table

Question: Q7 Now using a scale of 1 to 5, where 1 is strongly disagree and 5 is strongly agree, please rate how much you agree with the following statements.

Table Sub-Question: A. The way the economy is now, you can understand why people would prefer cash jobs

Strongly disagree
Disagree
Neutral
Agree
Strongly agree
Don't know
Refused

Table Sub-Question: B. Cash jobs are ok if it's for a friend

Strongly disagree
Disagree
Neutral
Agree
Strongly agree
Don't know
Refused

Table Sub-Question: C. Cash jobs are ok if it makes it cheaper

Strongly disagree
Disagree
Neutral
Agree
Strongly agree
Don't know
Refused

Table Sub-Question: D. It's ok for tradespeople to do cash jobs if they do it in their own time

Strongly disagree
Disagree
Neutral
Agree
Strongly agree
Don't know
Refused

Table Sub-Question: E. Cash jobs are ok if it's for a family member

Strongly disagree
Disagree
Neutral
Agree
Strongly agree
Don't know
Refused

Table Sub-Question: F. 'Cash jobs' are commonplace in New Zealand

Strongly disagree
Disagree
Neutral
Agree
Strongly agree
Don't know
Refused

END Table of Q7 Now using a scale of 1 to 5, where 1 is strongly disagree and 5 is strongly agree, please rate how much you agree with the following statements.

BEGIN Table

Question: Q8) In the last 12 months what types of cash jobs, if any, have you paid for? Code many, probe to no If necessary: Before we continue, let me assure you that any information you provide is completely confidential. Q8) When the research is complete, all names and contact details are removed from the data making it impossible to identify anyone who has taken part.

Table Sub-Question: Construction and repair services (e.g., building, plumbing, painting, decoration, electrical)

Yes
-----

No
----

Table Sub-Question: Home assistance services (e.g., gardening, child and elderly care, housework)

Yes
No

Table Sub-Question: Personal services (e.g., haircut, massage etc.)

Yes
No

Table Sub-Question: Automotive work (e.g. fixing car, spray painting car, installing new car stereo)

Yes
No

Table Sub-Question: Hospitality services (e.g., waiting tables, cleaning dishes, mopping floors in a restaurant, fastfood outlet; catering etc.)

Yes
No

Table Sub-Question: Seasonal work (e.g., picking fruit in an orchard etc.)

Yes
No

Table Sub-Question: Retail (e.g. goods/products from a store/business)

Yes
No

Table Sub-Question: On-line trading (e.g. TradeMe)

Yes
No

Table Sub-Question: 97 None (have not paid anyone under the table)

Yes
No

Table Sub-Question: 98 Don't know

Yes
No

Table Sub-Question: 99 Refused

Yes
No

Table Sub-Question: Other (specify)

Yes
No

END Table of Q8) In the last 12 months what types of cash jobs, if any, have you paid for? Code many, probe to no If necessary: Before we continue, let me assure you that any information you provide is completely confidential. Q8) When the research is complete, all names and contact details are removed from the data making it impossible to identify anyone who has taken part.

Question: Q8CRverb Verbatim for 'other' responses

Short text from respondent
----------------------------

BEGIN Table

Question: Q9) And what types of cash jobs, if any, have you yourself done in the last 12 months? Code many, probe to no

Table Sub-Question: Construction and repair services (e.g., building, plumbing, painting, decoration, electrical)

Yes
No

Table Sub-Question: Home assistance services (e.g., gardening, child and elderly care, housework)

Yes
-----

No
----

Table Sub-Question: Personal services (e.g., haircut, massage etc.)

Yes
No

Table Sub-Question: Automotive work (e.g. fixing car, spray painting car, installing new car stereo)

Yes
No

Table Sub-Question: Hospitality services (e.g., waiting tables, cleaning dishes, mopping floors in a restaurant, fastfood outlet; catering etc.)

Yes
No

Table Sub-Question: Seasonal work (e.g., picking fruit in an orchard etc.)

Yes
No

Table Sub-Question: Retail (e.g. goods/products from a store/business)

Yes
No

Table Sub-Question: On-line trading (e.g. TradeMe)

Yes
No

Table Sub-Question: 97 None (have not been paid under the table)

Yes
No

Table Sub-Question: 98 Don't know

Yes
No

Table Sub-Question: 99 Refused

Yes
No

Table Sub-Question: Other (specify)

Yes
No

END Table of Q9) And what types of cash jobs, if any, have you yourself done in the last 12 months? Code many, probe to no

Question: Q9CRverb verbatim for Q9'other' responses

Short text from respondent
----------------------------

BEGIN Table

Question: Q10) if Q3=1 to 96 or Q4=1 to 96 ask If you have paid for or done any cash jobs in the last 12 months, how was the payment made for this? Was it made by: Read, Code many

Table Sub-Question: 1 Cash A

Yes
No
Null

Table Sub-Question: 2 Internet banking B

Yes
No
Null

Table Sub-Question: 3 Cheque C

Yes
No
Null

Table Sub-Question: 98 Other (specify) CR

Yes
No
Null

Table Sub-Question: 99 Dont know CT

Yes
No
Null

Table Sub-Question: Refused CU

Yes
No
Null

END Table of Q10) if Q3=1 to 96 or Q4=1 to 96 ask If you have paid for or done any cash jobs in the last 12 months, how was the payment made for this? Was it made by: Read, Code many

Question: Q10CRverb

Short text from respondent
----------------------------

Question: Q11) if Q3=1 to 96 or Q4=1 to 96 ask And just roughly, about how much money was involved?

Don't Know
Refused
null
answer (specify)

Question: Q11verb

Short text from respondent
----------------------------

Question: X11) and just roughly, about hw much money was involved? (collapsed into catergories)

\$50 or less
--------------

\$51-100
\$101-500
\$501-1000
\$1000 or more
Other
Don't know
Refused
NULL

Question: Q12CRverb

Short text from respondent
----------------------------

BEGIN Table

Question: Q12) If Q7=1 to 96 or Q8=1 to 96 ask What are the main reasons you decided to pay for, or do a cash job? Code many

Table Sub-Question: 1. Everyone does it

Yes
No
Null

Table Sub-Question: 2. I pay too much tax already/I resent paying tax

Yes
No
Null

Table Sub-Question: 3. It was cheaper/can't afford to pay the full price

Yes
No
Null

Table Sub-Question: 4. I needed the money

Yes
No
Null

Table Sub-Question: 5. I did it to help out a friend/family member



Yes
No
Null

Table Sub-Question: 6. Because I was asked to

Yes
No
Null

Table Sub-Question: 7. To avoid paperwork/red tape

Yes
No
Null

Table Sub-Question: 8. It was a mistake

Yes
No
Null

Table Sub-Question: 9. Would rather I/a friend/family member did the job because I/they do it well

Yes
No
Null

Table Sub-Question: 10. Convenient/easier/just a small/quick job

Yes
No
Null

Table Sub-Question: 94 Other (specify)

Yes
No
Null

Table Sub-Question: 92 Don't know

Yes
No
Null

Table Sub-Question: 93 Refused

Yes
No
Null

END Table of Q12) If Q7=1 to 96 or Q8=1 to 96 ask What are the main reasons you decided to pay for, or do a cash job? Code many

BEGIN Table

Question: q12A) If Q7=97 and Q8=97 ask Are there any particular reasons you did not do, or pay for any cash jobs in the last 12 months? Code many

Table Sub-Question: 1 It's wrong/against the law

NO
YES
NULL

Table Sub-Question: 2 I don't want to get into trouble/be fined/go to jail

NO
YES
NULL

Table Sub-Question: 3 I didn't even think about it/consider it

NO
YES
NULL

Table Sub-Question: 4 Everything goes through the books

NO
YES
NULL

Table Sub-Question: 5 I didn't need any work done

NO
YES
NULL

Table Sub-Question: 6 I don't know anybody that could do the work for cash

NO
YES
NULL

Table Sub-Question: 7 I (still) couldn't afford it

NO
YES
NULL

Table Sub-Question: 8 I believe in the tax system

NO
YES
NULL

Table Sub-Question: 9 I'm an honest person

NO
YES
NULL

Table Sub-Question: 10 I don't agree with people doing cash jobs

NO
YES
NULL

Table Sub-Question: 11 I have a job and don't need the money

NO
YES
NULL

Table Sub-Question: 12 Don't have the skills for a cash job (cash jobs are done by tradies)

NO
YES
NULL

Table Sub-Question: 13 I prefer to pay a professional and get a receipt/invoice/pay online/keep it above board

NO
YES
NULL

Table Sub-Question: 14 Wasn't offered to me/there was no opportunity to do/pay for a cash job

NO
YES
NULL

Table Sub-Question: 15 Because I usually do the jobs myself

NO
YES
NULL

Table Sub-Question: 16 I'm retired/not working/have been overseas

NO
YES
NULL

Table Sub-Question: 96 Other (specify)

NO
YES
NULL

Table Sub-Question: 97 No particular reasons

NO
YES
NULL

Table Sub-Question: 98 Don't know

NO
YES
NULL

Table Sub-Question: 99 Refused

NO
YES
NULL

END Table of q12A) If Q7=97 and Q8=97 ask Are there any particular reasons you did not do, or pay for any cash jobs in the last 12 months? Code many

Question: Q12aCRverb

Short text from respondent
----------------------------

BEGIN Table

Question: Q13) On a scale of 1 to 5, where 1 is not likely at all and 5 is very likely, how likely is it that in the future, you would do each of the following things? Read

Table Sub-Question: a. Report someone to Inland Revenue who you believe is not paying their fair share of tax

Not likely at all
Not very likely
Neutral
Somewhat likely
Very likely
Don't know
Refused

Table Sub-Question: b. Agree to pay cash for a service, knowing that tax would be less likely to be paid on it

Not likely at all
Not very likely
Neutral

Somewhat likely
Very likely
Don't know
Refused

Table Sub-Question: c. Ask for a "cash price", knowing that tax would be less likely to be paid on it

Not likely at all
Not very likely
Neutral
Somewhat likely
Very likely
Don't know
Refused

Table Sub-Question: d. Ever sell goods you made, or offer services without reporting the income

Not likely at all
Not very likely
Neutral
Somewhat likely
Very likely
Don't know
Refused

END Table of Q13) On a scale of 1 to 5, where 1 is not likely at all and 5 is very likely, how likely is it that in the future, you would do each of the following things? Read

BEGIN Table

Question: Q14) Using a scale of 1 to 5, where 1 is strongly disagree and 5 is strongly agree, how much do you agree with the following statements? Read

Table Sub-Question: A. Most people honestly declare all of the income they earn

Strongly disagree
Disagree
Neutral
Agree
Strongly agree
Don't know
Refused

Table Sub-Question: B. Given the opportunity, most people would hide income to avoid paying taxes

Disagree
Neutral
Agree
Strongly agree
Don't know
Refused
Strongly disagree

Table Sub-Question: C. Inland Revenue would never know about income received doing cash jobs

Strongly disagree
Disagree
Neutral
Agree
Strongly agree
Don't know
Refused

Table Sub-Question: D. It's ok for people to run a business "on the side" without telling Inland Revenue

Disagree
Neutral
Agree
Strongly agree
Don't know
Refused
Strongly disagree

Table Sub-Question: E. If I cheat on my taxes, it is very likely I will get caught

Strongly disagree
Disagree
Neutral
Agree
Strongly agree
Don't know
Refused

Table Sub-Question: F. Cash jobs reduce the amount of money the Government gets for health, education and other essential services

Disagree
Neutral
Agree
Strongly agree
Don't know
Refused
Strongly disagree

Table Sub-Question: G. Most people know that doing cash jobs is against the law

Strongly disagree
Disagree
Neutral
Agree
Strongly agree
Don't know
Refused

Table Sub-Question: H. Paying tax is the right thing to do

Disagree
Neutral
Agree
Strongly agree
Don't know
Refused
Strongly disagree

END Table of Q14) Using a scale of 1 to 5, where 1 is strongly disagree and 5 is strongly agree, how much do you agree with the following statements? Read

Question: Q15) In the last 12 months have you seen or heard anything about people getting into trouble for not paying their taxes?

Yes
No
Don't know

Question: Q17) Thank you. Now just to finish off, I would like to ask some questions about you, to help make sure that we have spoken to a wide range of different people. First of all, can you tell me how many people, in total, live in your household?



1	One (including the respondent)
2	Two
3	Three
4	Four
5	Five
6	Six
96	More than six (specify)
99	Refused

Question: Q17CRverb

Short text from respondent
----------------------------

Question: Q18) If Q26=1 go to Q29 Are there any children in your household that are under 16 years of age?

Yes
No
Refused
Null

Question: Q19) And are you married or living with a partner? Note to interviewer: This includes civil unions and defacto relationships

No
Null
Refused
Yes

Question: Q20)Q1 If Q28=1 ask Which of these best describes the joint income of you and your partner before tax, for the last year? Please include any child support, benefits or other income support you or your partner may receive. ReadIf Q281 ask: Which of these best describes your personal income from all sources, before tax for the last year? Please include any child support, benefits or other income support you may receive. Read

1	Under \$40,000
2	At least \$40,000 but less than \$80,000
3	\$80,000 but less than \$100,000
4	\$100,000 but less than \$120,000
5	\$120,000 or more
98	Don't know **Do not read**
99	Refused **Do not read**

Question: Q21) Which of these best describes your highest educational qualification? read

1 NCEA, School Certificate, or other secondary school qualification
2 Polytechnic qualification or Trade Certificate, or
3 Bachelors degree or higher
96 Other Specify **Do not read**
97 None / No qualifications **Do not read**
98 Don't know **Do not read**
Other

Question: Q22) And which of these best describes where you live? Do you live in a...? Read

Large town or city
Rural area or small town
Don't know

Question: behaviourhas the participant participated in the hidden economy?

Has participated in hidden economy
Has not participated in hidden economy

Question: behaviour1

Paid someone else for cash job only
Have done a cash job only
Have paid and done a cash job
Have not participated in hidden economy at all

# IITA Auto Debt letter

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## Start of Block: Introduction

End of year income tax assessments are now automatic for most people. Your feedback will help Inland Revenue understand better ways to communicate income tax assessment information to customers.

On the next few pages, you will see a made-up example of an income tax assessment letter, please take a moment to read through it.

When answering the questions that follow, we'd like you to imagine that you are the person who the letter is addressed to. You have received this letter as your income tax assessment for 2022 and all of the information in the letter is correct and up to date.

---

Page Break

RELEASED UNDER THE OFFICIAL INFORMATION ACT



MR JOHN PAUL DOHERTY  
999 MOCK STREET  
PORIRUA 5024

IRD Number 999-999-999  
Reference L0000000000  
Issued 23 November 2022

*Income tax assessment issued under the Tax Administration Act 1994*

## Income tax assessment

for the tax year ended 31 March 2022

**You have tax to pay of \$68.16**  
Pay by 7 February 2023

We've completed your income tax assessment for the tax year 1 April 2021 to 31 March 2022.

Our records show that you have end-of-year tax to pay of \$68.16. Please pay by 7 February 2023.

### How your tax for the year was calculated

Have a look at the 'Your assessment details' section of this letter to understand how we worked out your tax to pay for the 2022 tax year.

The 'Your income information' section shows the income you earned, how much tax should have been paid, how much has been, and whether that means you have tax to pay, nothing to pay or a refund to receive.

### If our information about your income is wrong

You can change your income information in myIR:

1. Go to your income tax account.
2. Select **Returns and Transactions**.
3. Open the **Returns** tab.
4. Select **View or amend return** for 2022 and update your details.

You must tell us if you've received more than \$200 of income (before tax) that's not included in your assessment or if the information is wrong.

Please make any updates before 7 February 2023. Any change you make could change your bill amount to pay.

### If you do not have a myIR account

You can register for a myIR account today at [ird.govt.nz/myir](https://ird.govt.nz/myir)

Otherwise, you can contact us to update your information. Go to [ird.govt.nz/contactus](https://ird.govt.nz/contactus) to find the best way to get in touch.

### How you can pay your tax

You have several options, including:

- online via your myIR account,
- through your bank's internet banking,
- via direct debit,
- or by using credit or debit card using our self-service phoneline 0800 257 777.

Go to [ird.govt.nz/pay](https://ird.govt.nz/pay) to find the option that's best for you.

### When to pay your tax

Please pay by 7 February 2023.

### If you can't pay by the due date

If COVID-19 has affected you or your business, we have ways to help. Go to [ird.govt.nz/covid-19](https://ird.govt.nz/covid-19) to find out more.

If you're having difficulty paying your tax, you can set up an instalment arrangement in your myIR account allowing you to pay off the bill in smaller, regular payments. It's best to set up your instalment arrangement **before** your tax is due on 7 February 2023.

For more information, go to [ird.govt.nz/instalment](https://ird.govt.nz/instalment)

### Paying your taxes helps all New Zealanders

The money you pay goes towards hospitals, schools, COVID relief, and other essential services available to all New Zealanders.

### If you have any questions

For more information about your end-of-year tax, please go to [ird.govt.nz/end-of-tax-year](https://ird.govt.nz/end-of-tax-year)

Want to get in touch with us? Go to [ird.govt.nz/contactus](https://ird.govt.nz/contactus) to find the best option for you.

### Your portfolio investment entity calculation

The income you earn from your investments in PIEs is taxed differently to other income you earn, using a prescribed investor rate (PIR). If you do not use the correct PIR you can pay too much or too little tax on your PIE income. Find out more at [ird.govt.nz/PIR](https://ird.govt.nz/PIR)

We work out whether you have paid the right amount of tax on your PIE income based on the PIR you should have used. Any tax you have underpaid or overpaid is included in your assessment.

Here is your PIE income, the tax you paid, and the tax you should have paid for the year ending 2022.

#### PIE Calculation

Total PIE income/loss	\$253.07
Total PIE deductions	\$26.57
Correct tax on PIE income	\$26.57
<b>Your PIE income was taxed correctly</b>	<b>\$0.00</b>

You used the correct PIR all year and paid the right amount of tax on your PIE income.

Page Break

### Your assessment details

#### Income

Total gross income from salary, wages, benefits, taxable pensions	\$46,214.43
Total interest	\$69.46
Total income	\$46,283.89

**TAXABLE INCOME** **\$46,283.00**

**PIE debit** **\$0.00**

**Tax on taxable income** **\$7,119.52**

#### Tax deductions

Total PAYE for salary, wages, benefits, taxable pensions	\$7,508.82
ACC earners' levy	\$469.61

Total tax from salary, wages, benefits, taxable pensions \$7,039.21

Total RWT from interest \$12.15

**Total tax deductions** **\$7,051.36**

This is tax you've already paid

**TAX CALCULATION RESULT - DEBIT** **\$68.16**

**Your total tax to pay** **\$68.16**

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Page Break

### Your income information

Below shows the income and tax deductions that were used to calculate your assessment.

#### Salary, wages, benefits, and taxable pension information

Employer or payer	Gross income	Tax & ACC deducted
MINISTRY OF HOUSING - DEVELOPMENT SECTION 1 April 2021 to 31 March 2022	\$12,429.37	\$1,305.10
KNITWEAR (WELLINGTON) LIMITED 1 April 2021 to 31 March 2022	\$33,785.06	\$6,063.72
<b>Total</b>	<b>\$46,214.43</b>	<b>\$7,368.82</b>

#### Interest

Payer	Gross Interest	Resident withholding tax
SOUTHBANK NEW ZEALAND LIMITED 1 April 2021 to 31 March 2022	\$5.48	\$0.95
CREDIT UNION RAINBOW 1 April 2021 to 31 March 2022	\$63.98	\$11.20
<b>Total interest</b>	<b>\$69.46</b>	<b>\$12.15</b>

#### Portfolio investment entity (PIE) income or loss

Your correct PIR is 10.5%

PIE name	PIR at year end	PIR changed	PIE income/loss	PIE tax credits
SOUTHLAND SAVINGS KIWISAVER SCHEME April 2021 to 31 March 2022	10.50%	No	\$253.07	\$26.57
<b>Total PIE income or loss</b>			<b>\$253.07</b>	<b>\$26.57</b>



End of Block: Introduction

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Start of Block: Q1

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Question 1 Please indicate how clearly or unclearly the letter communicates the following messages:

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	Extremely unclear (1)	Unclear (2)	Somewhat unclear (3)	Neutral (4)	Somewhat clearly (5)	Clearly (6)	Extremely clearly (7)
Inland Revenue has completed my tax assessment and I have an income tax debt (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I need to pay my income tax debt by the 7th February 2023 (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My income tax debt was calculated by deducting the tax I paid during the year from my income (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
If any of my income information in the letter is wrong or missing, I need to update it in myIR (4)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

OFFICIAL INFORMATION ACT

How to get a myIR account or contact Inland Revenue if I don't have a myIR account to update my income information if any is wrong or missing (5)

The different options available to pay my income tax debt (6)

How to pay my income tax debt (7)

What to do if I have difficulty paying my income tax debt (8)

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Page Break

Question 2 Is there anything about this letter that you find confusing, or think is missing?

Please specify below.

Three horizontal lines for providing feedback.

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Page Break

Question 3 As a result of receiving this letter, what would you consider doing?

Please select all that apply.

- I would check that all of my income information was correct (1)
- I would pay my income tax debt without needing any further information or assistance (2)
- I would set up an instalment arrangement in myIR to pay off my debt over time (3)
- I would update my income information in myIR (if any was wrong or missing) (4)
- I would look for more information to work out how I got the debt (5)
- I would contact Inland Revenue for more information or help (6)
- I would contact a 3rd party, such as my accountant or tax agent (7)
- I would do something else – please specify (8)

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I would do nothing (9)

Don't know/unsure (10)

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Page Break

Display This Question:

If As a result of receiving this letter, what would you consider doing? Please select all that apply. = I would contact Inland Revenue for more information or help



Question 4 What would be your reason(s) for contacting Inland Revenue?

Please select all that apply.

- To find out how I got a debt (1)
  - To get more information about how to pay the debt (2)
  - To find out when the debt needs to be paid by (3)
  - To pay the debt or set up an instalment arrangement to pay it off (4)
  - To register for myIR or get help with logging in to my existing myIR account (5)
  - To update my income tax information (6)
  - To check that all of my income information is correct (7)
  - To clarify some information in the letter (8)
  - Another reason – please specify (9)
- 

Page Break

*Display This Question:*

*If As a result of receiving this letter, what would you consider doing? Please select all that apply. = I would contact Inland Revenue for more information or help*

Question 4b And how would you choose to contact Inland Revenue?

- By phone (1)
  - In person at an Inland Revenue office (2)
  - By sending a secure mail message through my myIR account (3)
  - Other – please specify (4)
- 

Page Break

*Display This Question:*

*If As a result of receiving this letter, what would you consider doing? Please select all that apply. = I would contact a 3rd party, such as my accountant or tax agent*

Question 5 What would be your reason(s) for contacting a 3rd party, such as your accountant or tax agent?

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Please select all that apply.

- To get more information about how I got the debt/confirm the debt is correct (1)
  - To get more information about how to pay the debt (2)
  - To find out when the debt needs to be paid by (3)
  - To organise paying the debt or setting up an instalment arrangement to pay it off (4)
  - To get them to update my income tax information with Inland Revenue (11)
  - To clarify some information in the letter (12)
  - Another reason - please specify (13)
- 

Page Break

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*Display This Question:*

*If As a result of receiving this letter, what would you consider doing? Please select all that apply. = I would do nothing*

Q6 For what reason(s) would you choose to do nothing after receiving this letter?

Please select all that apply.

- I don't trust that the debt is correct (1)
- I don't know what to do (2)
- I don't know how to do what is needed (3)
- I don't want to pay the debt (4)
- The letter doesn't seem important (5)
- I can't afford to pay the debt (6)
- It's not a priority for me (13)
- Another reason - please specify (7)

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Page Break

Q7 Which of the following would be your preferred way to make payment(s) towards your income tax debt?

- Through my myIR account (1)
  - Through my internet banking (2)
  - Via direct debit (3)
  - Credit or debit card using Inland Revenue's 0800 self-service phoneline (4)
  - Another way - please specify (5)
- 

Page Break

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Q8 How do you feel about the statement below that is included near the end of the letter?

Paying your taxes helps all New Zealanders.

The money you pay goes towards hospitals, schools, COVID relief, and other essential services available to all New Zealanders.

- Extremely positive (1)
  - Positive (10)
  - Somewhat positive (11)
  - Neutral (12)
  - Somewhat negative (13)
  - Negative (14)
  - Extremely negative (15)
-

Page Break \_\_\_\_\_

Q6b Please tell us why you feel  $\{Q8/ChoiceGroup/SelectedChoices\}$  about this statement...

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Page Break \_\_\_\_\_

Q10 Thinking about this letter and your own past experiences with income tax assessments, how could Inland Revenue improve the income tax assessment experience for customers like you?

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End of Block: Q1

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# IITA Auto Write-off letter

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## Start of Block: Introduction

End of year income tax assessments are now automatic for most people. Your feedback will help Inland Revenue understand better ways to communicate income tax assessment information to customers.

On the next few pages, you will see a made-up example of an income tax assessment letter, please take a moment to read through it.

When answering the questions that follow, we'd like you to imagine that you are the person who the letter is addressed to. You have received this letter as your income tax assessment for 2022 and all of the information in the letter is correct and up to date.

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Page Break

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MRS REESA THOMAS  
58 MOCK ROAD  
KAIKOHE 0405

IRD Number 999-999-999  
Reference L0000000000  
Issued 21 July 2022

*Income tax assessment issued under the Tax Administration Act 1994*

## Income tax assessment

for the tax year ended 31 March 2022

## Your account balance is

**\$0.00**

Good news, you've paid pretty much exactly the right amount of tax during the year 1 April 2021 to 31 March 2022. This means you do not need to do anything, unless you find something wrong with your information below.

### How your tax for the year was calculated

Have a look at the 'Your assessment details' section of this letter to understand how we worked out you have no tax to pay for the 2022 tax year.

The 'Your income information' section shows the income you earned, how much tax should have been paid, how much has been, and whether that means you have tax to pay, nothing to pay or a refund to receive.

### If our information about your income is wrong

You can change your income information in myIR:

1. Go to your income tax account.
2. Select **Returns and Transactions**.
3. Open the **Returns** tab.
4. Select **View or amend return** for 2022 and update your details.

You must tell us if you've received more than \$200 of income (before tax) that's not included in your assessment or if the information is wrong.

Please make any additional updates before 7 February 2023. Any change you make could also change the amount of your refund.

### If you do not have a myIR account

You can register for a myIR account today at [ird.govt.nz/myir](https://ird.govt.nz/myir)

Otherwise, you can contact us to update your information. Go to [ird.govt.nz/contactus](https://ird.govt.nz/contactus) to find the best way to get in touch.

**Thank you for paying your tax**

The money you pay goes towards hospitals, schools, COVID relief, and other essential services available to all New Zealanders.

**If you have any questions**

For more information about your end-of-year tax, please go to [ird.govt.nz/end-of-tax-year](https://ird.govt.nz/end-of-tax-year)

Want to get in touch with us? Go to [ird.govt.nz/contactus](https://ird.govt.nz/contactus) to find the best option for you.

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Page 2 of 4

### Your assessment details

#### Income

Total gross income from salary, wages, benefits, taxable pensions	\$19,358.04
Total interest	\$888.34
Total income	\$20,246.38

**TAXABLE INCOME** **\$20,246.00**

**Tax on taxable income** **\$2,563.05**

#### Tax deductions

Total PAYE for salary, wages, benefits, taxable pensions	\$2,405.00
ACC earners' levy	\$0.00

Total tax from salary, wages, benefits, taxable pensions	\$2,405.00
Total RWT from interest	\$155.46

**Total tax deductions** **\$2,560.46**

This is tax you've already paid

**TAX CALCULATION RESULT - DEBIT** **\$2.59**

Amount automatically written off (\$2.59)

**You have nothing to pay** **\$0.00**

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### Your income information

Below shows the income and tax deductions that were used to calculate your assessment.

#### Salary, wages, benefits, and taxable pension information

Employer or payer	Gross income	Tax & ACC deducted
MINISTRY OF SOCIAL DEVELOPMENT- PENSIONS 1 April 2021 to 31 March 2022	\$19,358.04	\$2,405.00
<b>Total</b>	<b>\$19,358.04</b>	<b>\$2,405.00</b>

#### Interest

Payer	Gross Interest	Resident withholding tax
BANK LIMITED 1 April 2021 to 31 March 2022	\$888.34	\$155.46
<b>Total interest</b>	<b>\$888.34</b>	<b>\$155.46</b>

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End of Block: Introduction

Start of Block: Q1



Question 1 Please indicate how clearly or unclearly the letter communicates the following messages:

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	Extremely unclearly (1)	Unclearly (2)	Somewhat unclearly (3)	Neutral (4)	Somewhat clearly (5)	Clearly (6)	Extremely clearly (7)
Inland Revenue has completed my tax assessment and I had a small income tax debt for 2022 (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My 2022 income tax debt was written-off by Inland Revenue (9)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Unless something is wrong with my information in the letter, I don't need to do anything more (10)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My income tax debt was calculated by deducting the tax I paid during the year from my income (11)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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If any of my income information in the letter is wrong or missing, I need to update it in myIR (12)

How to get a myIR account or contact Inland Revenue if I don't have a myIR account to update my income information if any is wrong or missing (13)

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Page Break

Question 2 Is there anything about this letter that you find confusing, or think is missing?

Please specify below.

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\_\_\_\_\_

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Page Break

Question 3 As a result of receiving this letter, what would you consider doing?

Please select all that apply.

- I would check that all of my income information was correct (1)
  - I would do nothing if all of my information was correct (11)
  - I would update my income information in myIR (if any was wrong or missing) (12)
  - I would look for more information to work out how I got the debt (13)
  - I would look for more information to work out why my debt was written-off (14)
  - I would contact Inland Revenue for more information or help (15)
  - I would contact a 3rd party, such as my accountant or tax agent (16)
  - I would do something else – please specify (8)
- 
- I would do nothing (9)
  - Don't know/unsure (10)

Page Break

*Display This Question:*

*If As a result of receiving this letter, what would you consider doing? Please select all that apply. = I would contact Inland Revenue for more information or help*

Question 4 What would be your reason(s) for contacting Inland Revenue?

Please select all that apply.

- To find out how I got a debt (1)
  - To get reassurance that I don't have to do anything (2)
  - To find out why my debt was written off (3)
  - To register for myIR or get help with logging in to my existing myIR account (5)
  - To update my income tax information (6)
  - To check that all of my income information is correct (7)
  - To clarify some information in the letter (8)
  - Another reason – please specify (9)
- 

Page Break

*Display This Question:*

*If As a result of receiving this letter, what would you consider doing? Please select all that apply. = I would contact Inland Revenue for more information or help*

Question 4b And how would you choose to contact Inland Revenue?

- By phone (1)
  - In person at an Inland Revenue office (2)
  - By sending a secure mail message through my myIR account (3)
  - Other – please specify (4)
-

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Page Break

*Display This Question:*

*If As a result of receiving this letter, what would you consider doing? Please select all that apply. = I would contact a 3rd party, such as my accountant or tax agent*

Question 5 What would be your reason(s) for contacting a 3rd party, such as your accountant or tax agent?

Please select all that apply.

- To find out how I got a debt (1)
  - To get reassurance that I don't have to do anything (2)
  - To update my income tax information (3)
  - To check that all of my income information is correct (4)
  - To find out why my debt was written off (11)
  - To clarify some information in the letter (12)
  - Another reason - please specify (13)
- 

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Page Break

Q8 How do you feel about the statement below that is included near the end of the letter?

Paying your taxes helps all New Zealanders.

The money you pay goes towards hospitals, schools, COVID relief, and other essential services available to all New Zealanders.

- Extremely positive (1)
- Positive (10)
- Somewhat positive (11)
- Neutral (12)
- Somewhat negative (13)
- Negative (14)
- Extremely negative (15)

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Page Break

Q6b Please tell us why you feel `{Q8/ChoiceGroup/SelectedChoices}` about this statement...

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Page Break

Q10 Thinking about this letter and your own past experiences with income tax assessments, how could Inland Revenue improve the income tax assessment experience for customers like you?

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End of Block: Q1

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# IITA More Info letter

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## Start of Block: Introduction

*Display This Question:*

*If IITA 2022 = rL0151-3a*

There's been some significant changes to income tax assessments in the last few years. Your feedback will help Inland Revenue understand better ways to communicate income tax assessment information to customers.

On the next few pages, you will see a made-up example of a letter about income tax assessments, please take a moment to read through it.

When answering the questions that follow, we'd like you to imagine that you are the person who the letter is addressed to. You have received this letter as part of your income tax assessment process for 2022 and all of the information in the letter is correct.

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Page Break

*Display This Question:*

*If IITA 2022 = rL0151-3b*

Q14 There's been some significant changes to income tax assessments in the last few years. Your feedback will help Inland Revenue understand better ways to communicate income tax assessment information to customers.

On the next few pages, you will see a made-up example of a letter about income tax assessments, please take a moment to read through it.

When answering the questions that follow, we'd like you to imagine that you are the person who the letter is addressed to. You have received this letter as part of your income tax assessment process for 2022, but some of your income information in the letter is wrong, or some is missing.

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Page Break



ird.govt.nz

MR JOHN ERIC ALSOP  
49 MOCK PLACE  
MOCK PALMERSTON NORTH 4412

IRD Number 999-999-999  
Reference L0000000000  
Issued 23 June 2022

## Income tax Completing your assessment

For the tax year ended  
31 March 2022

It's time to complete your income tax assessment for the tax year ended 31 March 2022.

When you've finished, you'll find out whether you have a refund, tax to pay or have paid the right amount of tax.

You can complete your assessment online through your myIR account. Please follow the 2-step process:

### Step 1: Check our records are correct

Have a look at the 'Your income information' section of this letter to see our record of the income you earned and the tax you paid during the 2022 tax year.

### Step 2: Complete your assessment

Go to **myIR > Income tax account > Returns and transactions > Periods** and click on 'Request to complete' on the 31 March 2022 period.

Follow the onscreen instructions to complete your assessment. If our records are incorrect or incomplete, you can:

- provide any missing information
- make any changes

It's important to complete your assessment by 7 August 2022, otherwise we'll send you an income tax assessment using the information shown in this letter.

### If you do not have a myIR account

You can register for a myIR account today at [ird.govt.nz/myir](https://ird.govt.nz/myir)

Otherwise, you can contact us to update your information. Go to [ird.govt.nz/contactus](https://ird.govt.nz/contactus) to find the best way to get in touch.

### What happens next?

We'll send you an income tax assessment. This will show the income you earned, how much tax should have been paid, how much has been, and whether that means you have tax to pay, nothing to pay or a refund to receive.

### If you have any questions

For more information about your end-of-year tax, please go to [ird.govt.nz/end-of-tax-year](https://ird.govt.nz/end-of-tax-year)

Want to get in touch with us? Go to [ird.govt.nz/contactus](https://ird.govt.nz/contactus) to find the best option for you.

IN CONFIDENCE  
Page 1 of 2

## Your income information

## Salary, wages, benefits and taxable pension information

Payer	Gross income	Earnings not liable for ACC levy	PAYE deducted
WOOD FOODS LIMITED			
1 August 2021 to 30 November 2021	\$1,876.25	\$0.00	\$229.01
TED'S CAFÉ			
1 April 2021 to 31 August 2021	\$9,616.32	\$0.00	\$1,399.55
TOM'S KITCHEN LIMITED			
24 December 2021 to 31 March 2022	\$2,388.78	\$0.00	\$314.89
<b>Totals</b>	<b>\$13,881.35</b>		<b>\$1,943.45</b>

## Interest

Payer	Gross interest	Resident withholding tax
ABC BANK LIMITED		
1 April 2021 to 31 March 2022	\$5.09	\$0.89
<b>Total</b>	<b>\$5.09</b>	<b>\$0.89</b>

## Dividends

Payer	Gross dividends	Imputation credits	RWT on dividends
SHARESIES NOMINEE LIMITED			
1 April 2021 to 31 March 2022	\$0.08	\$0.00	\$0.02
SHARESIES NOMINEE LIMITED			
1 April 2021 to 31 March 2022	\$0.04	\$0.00	\$0.01
<b>Totals</b>	<b>\$0.12</b>		<b>\$0.03</b>

Start of Block: Q1

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Question 1 Please indicate how clearly or unclearly the letter communicates the following messages:

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	Extremel y unclearl y (1)	Unclearl y (2)	Somewha t unclearl y (3)	Neutra l (4)	Somewha t clearl y (5)	Clearl y (6)	Extremel y clearl y (7)
I need to complete my 2022 income tax assessment (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To complete my income tax assessment , I need to confirm in myIR that my income tax information is correct (4)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
If any of my income information is wrong or missing, I need to update it in myIR before completing my income tax assessment (5)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I need to complete my income tax assessment by 7th August 2022 (6)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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If I don't complete my income tax assessment, Inland Revenue will complete it using the information in this letter (7)

How to complete my income tax assessment in myIR (8)

How to get a myIR account or contact Inland Revenue if I don't have a myIR account to complete my income tax assessment (9)

Once my income tax assessment is complete, I'll find out if I have a refund, tax to pay or if I've already paid the right amount of tax (10)



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Question 2 Is there anything about this letter that you find confusing, or think is missing?

Please specify below.

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Page Break

Question 3 As a result of receiving this letter, what would you consider doing?

Please select all that apply.

- I would check that all of my income information was correct (1)
- I would confirm my income information was correct and complete my income tax assessment in myIR without needing any further information or assistance (2)
- I would look for more information about how to complete my tax assessment (3)
- I would contact Inland Revenue for more information or help (6)
- I would contact a 3rd party, such as my accountant or tax agent (7)
- I would update my income information and complete my income tax assessment in myIR without needing any further information or assistance (11)
- I would do something else – please specify (8)

I would do nothing (9)

Don't know/unsure (10)

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Page Break

*Display This Question:*

*If As a result of receiving this letter, what would you consider doing? Please select all that apply. = I would contact Inland Revenue for more information or help*

Question 4 What would be your reason(s) for contacting Inland Revenue?

Please select all that apply.

- To get more information about how to complete my tax assessment (1)
- To clarify some information in the letter (2)
- To confirm my income information was correct (3)
- To update my income information (4)
- To complete my income tax assessment (5)
- To register for myIR or get help with logging in to my existing myIR account (6)
- To get confirmation that I had correctly completed my assessment through myIR (7)
- Another reason - please specify (8)

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Page Break

*Display This Question:*

*If As a result of receiving this letter, what would you consider doing? Please select all that apply. = I would contact Inland Revenue for more information or help*

Question 4b And how would you choose to contact Inland Revenue?

- By phone (1)
- In person at an Inland Revenue office (2)
- By sending a secure mail message through my myIR account (3)
- Other – please specify (4)

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Page Break

*Display This Question:*

*If As a result of receiving this letter, what would you consider doing? Please select all that apply. = I would contact a 3rd party, such as my accountant or tax agent*

Question 5 What would be your reason(s) for contacting a 3rd party, such as your accountant or tax agent?

Please select all that apply.

- To clarify some information in the letter (1)
- To check my income information was correct so they could complete my income tax assessment on my behalf (3)
- To update my income information so they could complete my income tax assessment on my behalf (4)
- To get confirmation that I had correctly completed my assessment (11)
- Another reason - please specify (12)

\_\_\_\_\_

Page Break

*Display This Question:*

*If As a result of receiving this letter, what would you consider doing? Please select all that apply. = I would do nothing*

**Q6** For what reason(s) would you choose to do nothing after receiving this letter?  
select all that apply.

Please

- The letter doesn't seem important (1)
  - I don't know what to do (2)
  - I don't know how to do what is needed (3)
  - I don't know what income information the letter is asking for (6)
  - It's not a priority for me (13)
  - Inland Revenue said they would complete it (14)
  - Another reason - please specify (7)
- 

Page Break

**Q8** Thinking about this letter and your own past experiences with income tax assessments, how could Inland Revenue improve the income tax assessment experience for customers like you?

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End of Block: Q1

# IR Brand Recruitment Script Testing

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## Start of Block: Intro

Q1 Thanks for taking the time to share your feedback with us today!

Inland Revenue is going to produce a recruitment ad soon. On the following pages, we'll show you a 3-minute video to explain what the recruitment ad will look like once it's been made. We'll need you to use your imagination a bit and you'll need your sound on when watching the video.

Once the recruitment ad's been produced, it will be around 30 seconds long and will look like something that you'd see on TV but, **before it's produced**, we'd like to get your feedback on the video's script and content.

After you've watched the video, we'll ask you a few questions about it - these should only take **3-5 minutes** to answer.

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Page Break

Q4 Before we start, please tell us which of the following statements best describes your current employment situation.

- I'm actively looking for employment (1)
- I'm not actively looking for employment but I'm open to good employment opportunities that come up (2)
- I'm not actively looking for employment (3)
- Prefer not to say (4)

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Page Break

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Q29 Please make sure your volume is on before pressing play.

Media File

---

Page Break

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Q6 Would you like to watch the video one more time?

- Yes (1)
- No, I've got it thanks (2)

*Skip To: Q8 If Would you like to watch the video one more time? = No, I've got it thanks*

---

Page Break

---

Q20 Please make sure your volume is on before pressing play.

Media File

---

Page Break

---

Q8 Were you able to clearly see and hear the whole video?

- Yes (1)
- No (2)

---

Page Break

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*Display This Question:*

*If Were you able to clearly see and hear the whole video? = No*

Q19 Unfortunately, you won't be able to complete the survey as there were some technical issues with the video.

But we do appreciate you taking the time to share your feedback, so you'll still get an entry into this month's IR Connection draw!

Please click the next button to submit your entry.

*Skip To: End of Survey If Unfortunately, you won't be able to complete the survey as there were some technical issues with... Is Displayed*

End of Block: Intro

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Start of Block: Messaging

Q9 What do you think this video is trying to tell you about working at Inland Revenue?

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Page Break

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Q10 Please tell us how **clear** or **unclear** you found the below **messages** in the video.

	Extremely clear (1)	Clear (2)	Somewhat clear (3)	Neutral (4)	Somewhat unclear (5)	Unclear (6)	Extremely unclear (7)
There is a diverse range of people working at Inland Revenue. (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
There is a diverse range of career opportunities at Inland Revenue. (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Inland Revenue is a rewarding place to work where staff can make a positive difference to the lives of NZ people and businesses. (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
There's more to Inland Revenue than just collecting tax. (4)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

End of Block: Messaging

Start of Block: Appeal and Understanding



Q9 Thinking about what you **liked** and **disliked** about the video...

Please tell us what you **liked** about the video below.

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Q28 Please tell us what you **disliked** about the video below.

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Page Break

Q11 After watching the video, how **appealing** or **unappealing** does **Inland Revenue** seem as a place to work?

- Extremely appealing (1)
- Appealing (2)
- Somewhat appealing (3)
- Neutral (4)
- Somewhat unappealing (5)
- Unappealing (6)
- Extremely unappealing (7)

Page Break

Display This Question:

If After watching the video, how appealing or unappealing does Inland Revenue seem as a place to work? = Extremely appealing

Or After watching the video, how appealing or unappealing does Inland Revenue seem as a place to work? = Appealing

Or After watching the video, how appealing or unappealing does Inland Revenue seem as a place to work? = Somewhat appealing

Q12 Please tell us what it is about the video that **makes Inland Revenue** seem like an **appealing** place to work.

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Page Break

Display This Question:

If After watching the video, how appealing or unappealing does Inland Revenue seem as a place to work? = Somewhat unappealing

Or After watching the video, how appealing or unappealing does Inland Revenue seem as a place to work? = Unappealing

Or After watching the video, how appealing or unappealing does Inland Revenue seem as a place to work? = Extremely unappealing

Q13 Please tell us what it is about the video that **makes Inland Revenue** seem like an **unappealing** place to work.

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Page Break

Q14 The video uses '**IR**' instead of the words '**Inland Revenue**', and '**IRL**' instead of the words '**in real life**'.

Please tell us which statements best describe how you understood '**IR**' and '**IRL**' in the video.

Please select all that apply.

- I understood that 'IR' meant 'Inland Revenue' (1)
- I understood that 'IRL' meant 'in real life' (2)
- I didn't understand what either meant (3)

End of Block: Appeal and Understanding

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Start of Block: CTA

Display This Question:

*If Before we start, please tell us which of the following statements best describes your current emp... = I'm actively looking for employment*

*Or Before we start, please tell us which of the following statements best describes your current emp... = I'm not actively looking for employment but I'm open to good employment opportunities that come up*

Q15 How **likely** or **unlikely** would you be to **visit Inland Revenue's careers page** after seeing this video?

- Extremely likely (1)
- Likely (2)
- Somewhat likely (3)
- Neutral (4)
- Somewhat unlikely (5)
- Unlikely (6)
- Extremely unlikely (7)

---

Page Break

Display This Question:

If How likely or unlikely would you be to visit Inland Revenue's careers page after seeing this video?  
= Neutral

Or How likely or unlikely would you be to visit Inland Revenue's careers page after seeing this video?  
= Somewhat unlikely

Or How likely or unlikely would you be to visit Inland Revenue's careers page after seeing this video?  
= Unlikely

Or How likely or unlikely would you be to visit Inland Revenue's careers page after seeing this video?  
= Extremely unlikely

Q16 Please tell us why you **wouldn't be likely** to visit Inland Revenue's careers page after seeing the video.

---

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End of Block: CTA

Start of Block: Perceptions

Q17 Please tell us how the video **changes how you think about Inland Revenue.**

It makes me think:

- more positively** about Inland Revenue (1)
- no differently** about Inland Revenue (2)
- more negatively** about Inland Revenue (3)

Skip To: End of Survey If Please tell us how the video changes how you think about Inland Revenue. It makes me think: = <strong>no differently</strong> about Inland Revenue

Page Break

Q18 Please tell us why the video makes you think  $\{Q17/ChoiceGroup/SelectedChoices\}$ .

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End of Block: Perceptions

## Go Live Release 4 Pulse Survey for KiwiSaver customers

We're interested in the experience you've had with the KiwiSaver service in myIR. Your feedback will help us to continue to improve this service.

Q1: Thinking about your most recent experience in the KiwiSaver section of myIR, what did you when you reached the KiwiSaver Member page? (i.e. the KiwiSaver home page)

Please select all that apply **RANDOMISE**

I browsed the information on the KiwiSaver Member page	1
I clicked on the "proof of income" link	2
I clicked on the "Apply for a savings suspensions" link	3
I clicked on the "more" link and found information about making a payment	4
I clicked on the new customer "opting out of KiwiSaver" link	5
I checked to see if I had any alerts or correspondence	6
I clicked on the "Calculate your PIR" link"	7
I checked my address details	8
I checked my Kiwisaver contributions	9
Something else	10
I didn't look at anything and I logged out	11 <b>SKIP TO END PAGE 1</b>

Q1a **ASK ALL IN Q1 (EXCEPT CODE 11)**

Is this the first time you've visited the KiwiSaver section in myIR or have you been here before?

This is the first time	1
I've been here before	2

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**Q2 ASK IF: Q1= “SAVINGS SUSPENSION, MORE LINK, CALCULATE YOUR PIR, OPT OUT, OR CHECKED CONTRIBUTION IN Q1”**

Thinking about your most recent experience with KiwiSaver in myIR, to what extent do you agree or disagree with the following statements.

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree	Don't know
I understood what the “making a payment” option was about (only if answered “making” a payment option)	1	2	3	4	5	6
More explanation about making a payment would be helpful (only if answered making a payment)	1	2	3	4	5	6
I understood what applying for a savings suspension was for (only if answered “savings suspension”)	1	2	3	4	5	6
More explanation about applying for a savings suspension would be helpful (savings suspension only).	1	2	3	4	5	6
I understood what the opting out of KiwiSaver was about (opt out option only)	1	2	3	4	5	6
More explanation about opting out of KiwiSaver would be helpful (opt out only)	1	2	3	4	5	6
I understood what the PIR calculation was for. (PIR calculator only)	1	2	3	4	5	6
More explanation about using the PIR calculator would be helpful (PIR Calculator only).	1	2	3	4	5	6
I could easily reconcile my Kiwisaver contributions to my pay (checked contribution only)	1	2	3	4	5	6
More explanation on how to reconcile my contributions to my pay would be helpful (checked contribution only)	1	2	3	4	5	6

We can also see that larger businesses (more than 10 employers and Significant Enterprises) are finding it easier to file than smaller businesses. Despite the differences in ease of filing by size of business, channel of filing (as described in slide 3) remains the most significant influence on filing experience.

**Q3 ASK IF: Q1= answered savings suspension**

Thinking about your **most recent** experience applying for a KiwiSaver savings suspension, how easy or difficult was it to do what you needed to?

Very difficult	Quite difficult	Quite Easy	Very Easy	Don't know / can't remember
1	2	3	4	5
<b>Go to Q3b</b>	<b>Go to Q3b</b>	<b>Go to Q3a</b>	<b>Go to Q3a</b>	<b>GO TO Q5 Instruction 1:</b>

**Q3a:** What made it easy for you? Please be as detailed as possible.

Text
------

**Q3ai:** If you provided a comment in the previous question, which of the following categories does your comment belong to? You can choose more than one option.

Clear savings suspension instructions	1
I could see all my employer details	2
I can apply for a suspension up to 12 months	3
Don't know	88
Something else	99

**GO TO Q5 INSTRUCTION 1:**

**Q3b:** What made it difficult for you? Please be as detailed as possible.

Text
------

**Q3bi:** If you provided a comment in the previous question, which of the following categories does your comment belong to? You can choose more than one option.

Unclear savings suspension instructions	1
Couldn't see all my employer details	2
I wanted to apply for a suspension for less than 3 months	3
I want more information on what a savings suspension was	4
Don't know	88
Something else	99

**GO TO Q5 INSTRUCTION 1**

**Q4 ASK IF: Q1= answered PIR calculator:**

Thinking about your **recent** experience with the PIR calculator, how easy or difficult was it to do what you needed to?

Very difficult	Quite difficult	Quite Easy	Very Easy	Don't know / can't remember
1	2	3	4	5
<b>Go to Q4b</b>	<b>Go to Q4b</b>	<b>Go to Q4a</b>	<b>Go to Q4a</b>	<b>GO TO Q5 INSTRUCTION 1</b>

**Q4a** What made it easy for you? Please be a detailed as possible.

Text
------

**Q4ai:** If you provided a comment in the previous question, which of the following categories does your comment belong to? You can choose more than one option.

Clear PIR calculator instructions	2
I knew what information to add	
I knew what my PIR rate was at the end	
Don't know	
Something else:	

**GO TO Q5 INSTRUCTION 1**

**Q4b:** What made it difficult for you? Please be a detailed as possible.

Text
------



**Q4bi:** If you provided a comment in the previous question, which of the following categories does your comment belong to? You can choose more than one option.

Unclear PIR calculator instructions	
Unsure what PIR information to add	
Unsure If my 2020 income information would be accurate enough	
Don't know	
Something else:	

**GO TO Q5 INSTRUCTION 1**

**Q5 Instruction 1: (USE THIS WORDING IF COMPLETED PAYMENTS SUSPENSION OR PIR CALCULATOR QUESTION)**

Is there anything **else** easy or difficult you'd like to share about your recent experience in the KiwiSaver section of myIR? Please be as detailed as possible.

TEXT
------

**Q5: INSTRUCTION 2: USE THIS WORDING FOR EVERYONE WHO DID NOT COMPLETE THE SAVINGS SUSPENSION OR PIR CALCULATOR QUESTIONS**

Is there anything easy or difficult you'd like to share about your recent experience in the KiwiSaver section of myIR? Please be as detailed as possible.

TEXT
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Q5b: If you have provided a comment about your most recent experience, which of the following categories does your comment belong to? You can choose more than one option.

Language was easy to understand	1
Easy to find my way around	2
Easy to update my details	3
Easy to understand my contributions	4
Easy to check alerts	5
Easy to check my correspondence	6
Language was hard to understand	7
Hard to find my way around	8
Hard to update my details	9
Hard to understand my contributions	10
Hard to check my alerts	11
Hard to check my correspondence	12
Don't know	13
Something else	14

**END PAGE 1: ONLY IF Q1 = 11**

Thank you for your willingness to participate. Unfortunately you do not meet all the survey criteria this time.

**END PAGE 2 THANK YOU PAGE**

Thanks for your feedback. Your time is appreciated.

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# Marketing & Communications - Bank account survey

## Survey Flow

Standard: 1st Block - INTRO (1 Question)  
Standard: 2ND BLOCK Letter/Screening/Messaging (5 Questions)  
Block: 3RD BLOCK Did not receive (2 Questions)  
Standard: 4TH BLOCK Did receive (4 Questions)  
Standard: 5TH BLOCK Improvement (5 Questions)  
Standard: LAST BLOCK Letter 2 questions (5 Questions)

Page Break

---

Start of Block: 1st Block - INTRO

Introduction End of year tax assessments are now an automatic process for most New Zealanders. For the automatic tax assessment process to work, Inland Revenue needs correct and up to date information.

On the next page, you will see a copy of an Inland Revenue letter about automatic tax assessments. The questions in this survey will be about this letter. Please take a moment to read through the letter before moving on to the next page.

This survey will help Inland Revenue understand if we are communicating effectively with customers, as well as understanding customers' experiences at the end of the tax year.

End of Block: 1st Block - INTRO

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Start of Block: 2ND BLOCK Letter/Screening/Messaging

Q1 Do you recall receiving this communication from Inland Revenue between March and May of 2021?

- Yes (1)
- No (2)
- Unsure (3)

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Letter example

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Page Break

Q2 What do you think the key message of that communication is about?

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Q2b Is there anything about that communication that you find confusing or unclear?

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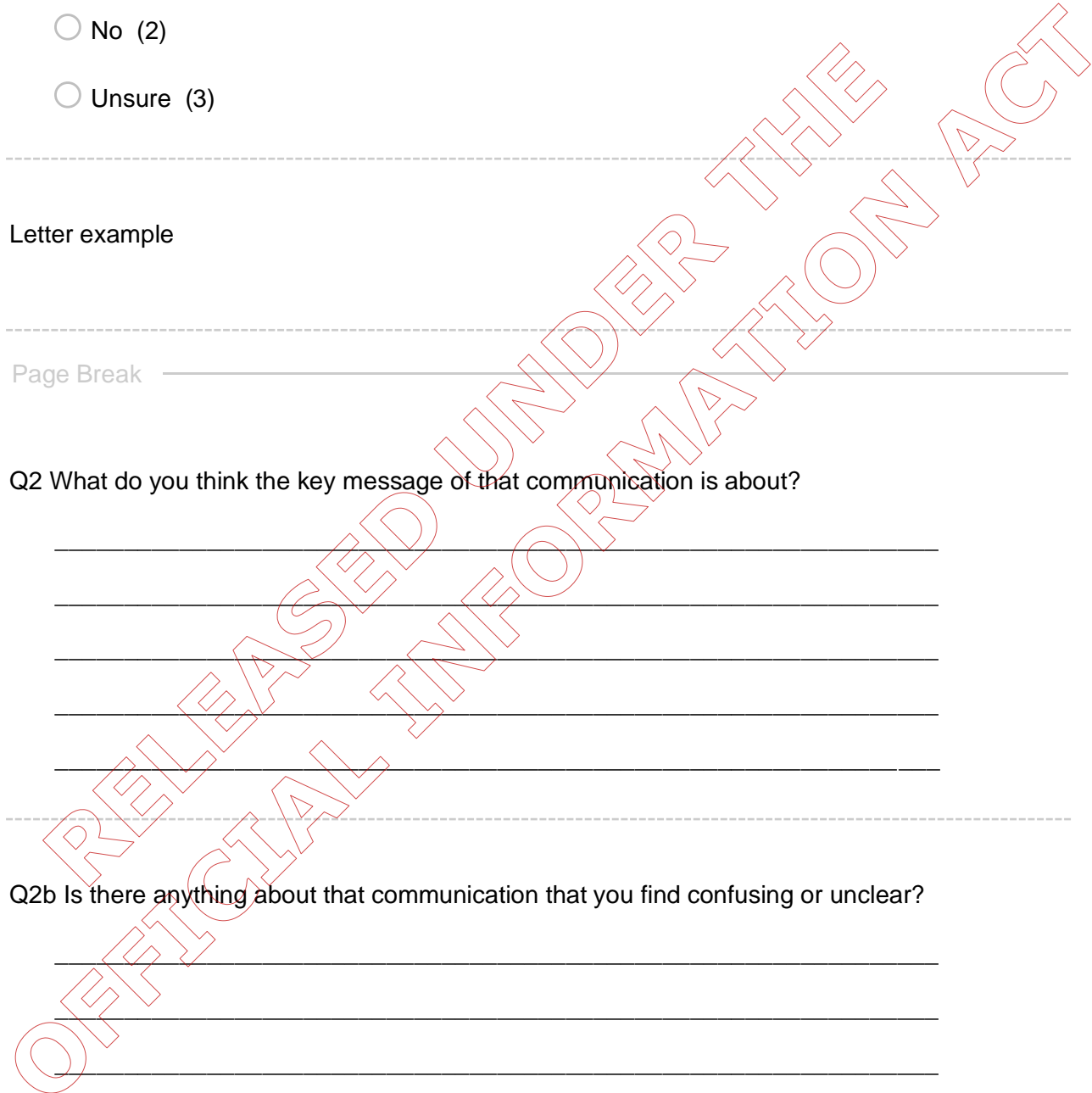
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Page Break



Q3 How clear or unclear do you think the following messages are in that communication?

	Extremely unclear (1)	Unclear (2)	Somewhat unclear (3)	Neutral (4)	Somewhat clear (5)	Clear (6)	Extremely clear (7)
I need to update my income tax bank account with Inland Revenue so that any refunds can be paid to me (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I need to register for, or log into myIR to update my income tax bank account (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I will receive my automatic income tax assessment between May and July (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

End of Block: 2ND BLOCK Letter/Screening/Messaging

Start of Block: 3RD BLOCK Did not receive

Display This Question:

If Do you recall receiving this communication from Inland Revenue between March and May of 2021?  
= No

Or Do you recall receiving this communication from Inland Revenue between March and May of 2021? = Unsure



Q4 If you received this communication from Inland Revenue today, what would you do?

Please select all that apply.

- I would update my income tax bank account in myIR (1)
- I would reach Inland Revenue by phone to update my income tax bank account (2)
- I would go into an Inland Revenue office to update my income tax bank account (3)
- I would do something else – please specify (4)

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- I would do nothing (5)
- Don't know/unsure (6)

Page Break

Display This Question:

If If you received this communication from Inland Revenue today, what would you do? Please select a... = I would do nothing

Q5 Which of the following reasons explains why you would choose to do nothing?

Please select all that apply.

- I don't know how to do what I need to do (1)
  - I can't remember my login details for myIR/don't know how to re-set my password (2)
  - I would think that it was spam or a phishing email (3)
  - I can't be bothered/don't think it's important (4)
  - Inland Revenue should updated it automatically for me by contacting my bank (5)
  - I don't have/know my bank account details (6)
  - Internet access is a problem for me (7)
  - I don't trust Inland Revenue with my bank account details (8)
  - Other - please specify (9)
- 

End of Block: 3RD BLOCK Did not receive

---

Start of Block: 4TH BLOCK Did receive

*Display This Question:*

*If Do you recall receiving this communication from Inland Revenue between March and May of 2021?  
= Yes*

Q6 Do you recall what you did after you received this communication between March and May of 2021?

Please select all that apply.

- I updated my bank account details in myIR successfully (1)
  - I tried to update my bank account in myIR, but couldn't (2)
  - I contacted Inland Revenue by phone to update my bank account details (3)
  - I went into an Inland Revenue office to update my bank account details (4)
  - I did something else – please specify (5)
- 
- I did nothing (6)
  - Can't recall (7)

Page Break

*Display This Question:*

*If Do you recall what you did after you received this communication between March and May of 2021? ... = I updated my bank account details in myIR successfully*

Q6a How easy or difficult was it for you to update your bank account in myIR?

- Very difficult (15)
- Difficult (16)
- Somewhat difficult (17)
- Neutral (18)
- Somewhat easy (19)
- Easy (20)
- Very easy (21)



Page Break

Display This Question:

If Do you recall what you did after you received this communication between March and May of 2021? ... = I did nothing

Q7a Which of the following reasons explains why you did nothing?

Please select all that apply.

- It was not clear what I needed to do (4)
- I couldn't remember my login details for myIR (5)
- I thought it was spam or a phishing email (6)
- I couldn't be bothered/didn't think it was important (7)
- I didn't have/know my bank account details (8)
- I thought Inland Revenue should have the information and update my bank account for me themselves (9)
- I had no internet access (10)
- I didn't trust Inland Revenue with my bank account details (11)
- Can't recall (13)
- Other – please specify (12)

Page Break

Display This Question:

If Do you recall what you did after you received this communication between March and May of 2021? ... = I tried to update my bank account in myIR, but couldn't

Q7b Which of the following reasons explains why you couldn't update your bank account in myIR?

Please select all that apply.

- It was not clear what I needed to do (4)
- I couldn't re-set my password/get confirmation of my username (5)
- I couldn't tell if it was spam or a phishing email, or not (6)
- I couldn't find how/where to update my bank account details in myIR (7)
- It was easier to reach Inland Revenue on the phone or go into an Inland Revenue office to do it (8)
- I didn't have/know my bank account details (9)
- I had no internet access (10)
- Other – please specify (11)  
\_\_\_\_\_
- Can't recall (12)

End of Block: 4TH BLOCK Did receive

Start of Block: 5TH BLOCK Improvement

For the next few questions, please imagine that it's almost the end of year tax assessment time again and Inland Revenue needs a bank account for your income tax so that a refund can be paid to you. You may not be aware that you have an income tax refund owing to you.

Page Break

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Q8 How would you want Inland Revenue to ask you for your income tax bank account information?

Please select all that apply.

- Send me an email (4)
  - Send me a letter in the post (5)
  - Send me a text message (6)
  - Send me a message through myIR (7)
  - Contact my tax agent (8)
  - Other – please specify (9)
- 
- Don't know (11)

Page Break

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Q9 If Inland Revenue sent you this communication, what improvements could be made to it that would make you more likely to update your bank account with Inland Revenue?

Please select all that apply.

- Clearer instructions on how to update my bank account details in myIR (4)
- Clearer messaging about what I need to do. Tell us more. (5)

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- When action need to be taken and an explanation of why (6)
- Make it easier to understand by using simpler language (7)
- Reduce the amount of information in this communication (8)
- Other - please specify (11)

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- No more details/information is required (10)

Page Break

Q10 How would you prefer your income tax bank account details are updated with Inland Revenue in the future?

Please select all that apply.

- Update it myself through myIR (4)
- Contact Inland Revenue to update it over the phone (5)
- Visit an Inland Revenue office to update it in person (6)
- My tax agent updates my bank account for me (7)
- Inland Revenue automatically updates it for me by contacting my bank (8)
- Reply to an email from Inland Revenue authorising them to update my income tax bank account to the same bank account that I have registered for another tax type, such as my Working for Families (9)
- Reply to SMS text message from Inland Revenue authorising them to update my income tax bank account to the same bank account that I have registered for another tax type, such as my Working for Families (10)
- Other – please specify (11)

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Page Break

Q11 Is there anything else that you'd like to tell us that would make updating your bank account with Inland Revenue easier for you?

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End of Block: 5TH BLOCK Improvement

Start of Block: LAST BLOCK Letter 2 questions

Q12 We have 2 to 3 more quick questions for you. On the next page you'll see another Inland Revenue letter that's similar to the one that you've already seen. Please take a moment to read through the letter before moving on to the final 2 to 3 questions.

Page Break

Letter example

Page Break

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Q12b How clear or unclear do you think the following messages are in this communication?

	Extremely Unclear (1)	Unclear (2)	Somewhat unclear (3)	Neutral (4)	Somewhat clear (5)	Clear (6)	Extremely clear (7)
I need to update my income tax bank account with Inland Revenue so that any refunds can be paid to me (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I need to register for, or log into myIR to update my income tax bank account (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I will receive my automatic income tax assessment between May and July (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I need to update my email address in myIR so that I receive important information from Inland Revenue (16)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



Page Break

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Q13 If you received this communication from Inland Revenue today, what would you do?

Please select all that apply.

I would update my income tax bank account in myIR (7)

I would update my email address in myIR (8)

I would do something else – please specify (9)

---

I would do nothing (10)

Don't know/unsure (11)

---

*Display This Question:*

*If you received this communication from Inland Revenue today, what would you do? Please select a... = I would do nothing*

Q14 Please tell us why you would choose to do nothing after receiving this communication?

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End of Block: LAST BLOCK Letter 2 questions

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# RRL\_Pre-Campaign

## Introduction

Thank you for taking time to complete this questionnaire. Your individual responses are completely confidential and will only be seen by Inland Revenue's research team. Only 'grouped' information will ever be included in any report, so you cannot be identified.

Have you seen or heard of anything about changes introduced in 2019 to the treatment of tax losses relating to residential investment properties?

- Yes (1)
- No (2)
- Possibly (3)

---

*Display This Question:*

*If Have you seen or heard of anything about changes introduced in 2019 to the treatment of tax losses... = Yes*

Please tell us what you saw or heard.

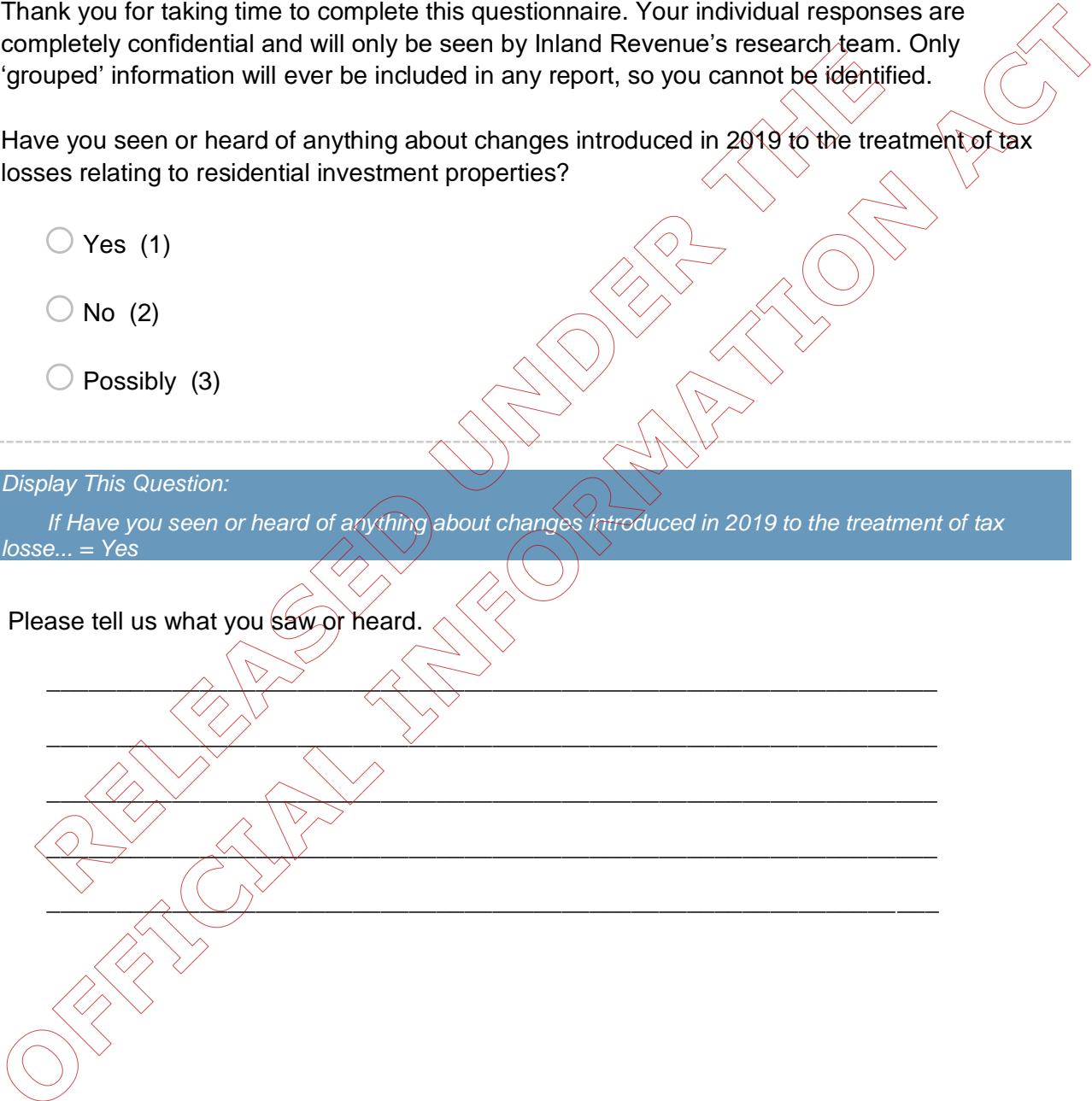
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Display This Question:

If Have you seen or heard of anything about changes introduced in 2019 to the treatment of tax losses... = Yes

Where did you see or hear about the 2019 changes to the tax treatment of tax losses relating to residential investment properties?  
Please tick all the sources that apply.

- Accountant(s) (1)
  - Lawyer(s) (2)
  - Real Estate Agent(s) (3)
  - Online news website (4)
  - Newspaper(s) (5)
  - Inland Revenue (website, email, staff person, publication) (6)
  - Television news (7)
  - Politicians (8)
  - Radio (9)
  - Social media (10)
  - Word of mouth (11)
  - Other (please tell us) (12)
- 

Page Break

Q5 Before today, had you heard the term 'residential property deduction rules'? (you may also have heard this referred to as 'ring-fencing rules')

- Yes (1)
- No (2)
- Possibly (3)

---

*Display This Question:*

*If Before today, had you heard the term 'residential property deduction rules'? (you may also have h... = Yes*

*Or Before today, had you heard the term 'residential property deduction rules'? (you may also have h... = Possibly*

Q6 How would you describe your knowledge about the residential property deduction rules?

- I know a lot about the rules (1)
- I know a little about the rules (2)
- I don't know much at all about the rules (3)

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Q7

The residential rental property deduction rules apply when a person’s deductible rental expenses are more than their rental income. This is referred to as excess deductions.

Before today, were you aware of the following things about the residential property deduction rules (also known as the ring-fencing rules)?

	Yes (1)	No (2)	Don't know (3)
When you have excess deductions you generally cannot use them against your other income, such as salary and wages or business income, which would result in a lower tax liability. (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Excess deductions can be carried forward from year to year and deducted when your residential property makes income. (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The residential property deduction rules do not apply to your main home. (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To work out your residential property deductions, you can use either a portfolio basis or an individual property basis, or both together. (4)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The residential property deduction rules apply to residential property both in New Zealand and overseas. (5)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q8

Where would you go to find information about the residential property deduction rules?  
Please select all that apply.

- Lawyer(s) (1)
  - Accountant(s) (2)
  - Real Estate Agent(s) (3)
  - Inland Revenue's website (4)
  - Somewhere else - please tell us (5)
- 

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Q9 How effective do you think that Inland Revenue is in ensuring that people who need to know about the residential property deduction rules get the information they need?

- Very effective (1)
  - Somewhat effective (2)
  - Neither effective nor ineffective (3)
  - Somewhat ineffective (4)
  - Very ineffective (5)
  - Don't know (6)
- 

Q10

If you wish to learn more about the residential property deduction rules, you can take a look at the information page on Inland Revenue's website:

[www.ird.govt.nz/property/renting-out-residential-property/residential-rental-property-deductions](http://www.ird.govt.nz/property/renting-out-residential-property/residential-rental-property-deductions)

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Finally, we have a few background questions that will help us check we've surveyed a range of people.

Q12 Do you live in...?

- A main city (Auckland, Hamilton, Wellington, Christchurch, Dunedin) (1)
  - A provincial city or large town (2)
  - A small town, rural area or farm (3)
- 

Q13

And in which of the following regions do you live?

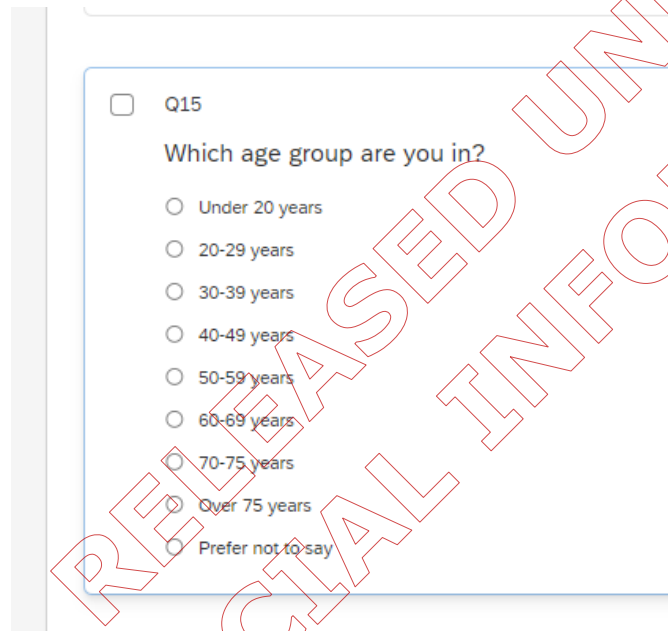
- Northland
- Auckland
- Waikato
- Bay of Plenty
- Gisborne
- Hawke's Bay
- Taranaki
- Manawatu-Whanganui
- Wellington
- Tasman
- Nelson
- Marlborough
- West Coast
- Canterbury
- Otago
- Southland
- Elsewhere (please tell us)

Q14 What is your gender?

- Male (1)
  - Female (2)
  - Another gender (3)
  - Prefer not to say (4)
- 

Q15 Which age group are you in?

---



A screenshot of a survey question titled "Q15 Which age group are you in?". The question is displayed in a light blue box with a white background. The options are listed below the question, each with a radio button. The options are: Under 20 years, 20-29 years, 30-39 years, 40-49 years, 50-59 years, 60-69 years, 70-75 years, Over 75 years, and Prefer not to say. A large, diagonal watermark reading "OFFICIAL INFORMATION ACT" is overlaid across the entire page, including the screenshot.



Q16

Which ethnic group(s) do you belong to?  
Please select all that apply.

- New Zealand European (1)
  - Māori (2)
  - Samoan (3)
  - Cook Island Māori (4)
  - Tongan (5)
  - Niuean (6)
  - Chinese (7)
  - Indian (8)
  - Another ethnic group (please tell us) (9)
- 

- Prefer not to answer (10)
- 

Q17 Were you born:

- In New Zealand (1)
  - Overseas (2)
-

Display This Question:

If Were you born: = Overseas

Q18 How long have you lived in New Zealand?

- Less than one year (1)
  - 1 - 5 years (2)
  - 5 - 10 years (3)
  - 10 - 20 years (4)
  - More than 20 years (5)
- 

Ngā mihi. We thank you for your time spent taking this survey.

Your response has been recorded.

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# Short-process rulings

Q2 Welcome to the Short-process rulings feedback survey.

We're interested in the experience you've had with short-process rulings. Your feedback will help us to continue improving this service.

Please enter our reference number(s) for your ruling application (this can be found in the cover email)

---

Q1. Service

For the staff working on your ruling application, how satisfied were you with:

a) their competence

- Very satisfied (1)
- Satisfied (2)
- Somewhat satisfied (3)
- Neutral (4)
- Somewhat dissatisfied (5)
- Dissatisfied (6)
- Very dissatisfied (7)
- Not applicable (99)

---

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Q2b) their professionalism

- Very satisfied (1)
- Satisfied (2)
- Somewhat satisfied (3)
- Neutral (4)
- Somewhat dissatisfied (5)
- Dissatisfied (6)
- Very dissatisfied (7)
- Not applicable (99)

---

Q3 Optional comments

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Page Break

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Q4. Timeliness

How satisfied were you with the time taken to complete the ruling process, given the issues raised? Choose an option

- Very satisfied (1)
- Satisfied (2)
- Somewhat satisfied (3)
- Neutral (4)
- Somewhat dissatisfied (5)
- Dissatisfied (6)
- Very dissatisfied (7)
- Not applicable (99)

---

Q5 Optional comments

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Page Break

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Q6. Value for money. How satisfied were you with the ruling fee for the application, given the issues raised? Choose an option

- Very satisfied (1)
- Satisfied (2)
- Somewhat satisfied (3)
- Neutral (4)
- Somewhat dissatisfied (5)
- Dissatisfied (6)
- Very dissatisfied (7)
- Not applicable (99)

---

Q7 Optional comments

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Q8. Decision quality If the reasons for our decision(s) were communicated with you, how satisfied were you that the reasons were: a) comprehensive

- Very satisfied (1)
  - Satisfied (2)
  - Somewhat satisfied (3)
  - Neutral (4)
  - Somewhat dissatisfied (5)
  - Dissatisfied (6)
  - Very dissatisfied (7)
  - Not applicable (99)
- 

Q8 b) clearly explained

- Very satisfied (1)
  - Satisfied (2)
  - Somewhat satisfied (3)
  - Neutral (4)
  - Somewhat dissatisfied (5)
  - Dissatisfied (6)
  - Very dissatisfied (7)
  - Not applicable (8)
-

Q9 Optional comments

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Q10. Overall satisfaction

Overall, how satisfied were you with the service provided? Choose an option

- Very satisfied (1)
- Satisfied (2)
- Somewhat satisfied (3)
- Neutral (4)
- Somewhat dissatisfied (5)
- Dissatisfied (6)
- Very dissatisfied (7)
- Not applicable (99)

---

Q11 Optional comments

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## Go Live Release 4 Pulse Survey for Student Loan customers

We're interested in your opinions about the recent changes for Student loan customers in myIR. Your feedback will help us continue to improve this service.

Q1: Thinking about your most recent experience in the Student Loan section of myIR, did you notice or see any of the following changes? *Please tick all that apply.*

Loan breakdown	1
Loan transactions	2
Interest information	3
Apply for a reduced deduction rate	4
Update alternative contact person details	5
Ability to update loan overpayment settings	6
The Loan repayment calculator	7
View international travel dates	8
Overseas travel interest calculator	9
Apply for interest free status while living overseas	10
Estimate interim assessment	11

Q1a: Did you notice or see the "application for relief" option on the myIR homepage?

Yes	1
No	2

Q2: **Customers will only be presented with statements related to their "Yes" answers in Questions 1 or Question 1a above.**

In your opinion, to what extent will these recent changes make it easier or more difficult for you as a student loan customer?

	Much more difficult	Somewhat more difficult	Neither easier or more difficult	Somewh at easier	Much easier
The Loan repayment calculator	1	2	3	4	5
Ability to update loan overpayment details	1	2	3	4	5
Apply for a reduced deduction rate	1	2	3	4	5
View your loan transactions	1	2	3	4	5
Loan breakdown	1	2	3	4	5
Estimate interim assessment	1	2	3	4	5
Interest information	1	2	3	4	5
Apply for relief for money owed to Inland Revenue	1	2	3	4	5
Update alternative contact person details	1	2	3	4	5
View international travel dates	1	2	3	4	5
Overseas travel interest calculator	1	2	3	4	5
Apply for interest free status while living overseas	1	2	3	4	5

**Q3: ONLY ASK IF APPLIED FOR DEDUCTION (SOURCE IR ADMIN DATA)**

We understand you've recently applied for a reduced deduction rate. We're interested in feedback on your experience.

Thinking about your most recent experience applying for a reduced deduction rate, how easy or difficult was it to do what you needed to?

Very difficult	Quite difficult	Quite Easy	Very Easy	Don't know / can't remember
1	2	3	4	5

**Q3a** What made it easy for you? Please be as detailed as possible.

Text
------

**Q3ai:** If you have provided a comment, which of the following categories does your comment belong to? Please select all that apply.

Language was easy to understand	1
It was clear what I needed to do	2
I had all the information I needed	3
I could save the form	4
I was confident of next steps	5
Don't know	88
Something else	99

**Q3b.** What made it difficult for you? Please be as detailed as possible.

Text
------

**Q3bi:** If you provided a comment, which of the following categories does your comment belong to? Please select all that apply.

Language was hard to understand	1
It was unclear what I needed to do	2
I had to go find unexpected extra information to complete the request	3
I was unsure of the next steps	4
Don't know	88
Something else	99

**IF COMPLETED Q3 SERIES: GO TO Q5**

**Q4: ONLY ASK IF UPDATED LOAN OVERPAYMENT SETTINGS AND HAS NOT APPLIED FOR A DEDUCTION RATE REQUEST (SOURCE for both IR ADMIN DATA):**

We understand you've recently updated your loan overpayment settings. We're interested in your feedback on your experience.

Thinking about your most recent experience updating your loan overpayment settings, how easy or difficult was it to do what you needed to?

Very difficult	Quite difficult	Quite Easy	Very Easy	Don't know / can't remember
1	2	3	4	5

**Q4a** What made it easy for you? Please be a detailed as possible.

Text
------

**Q4ai:** If you provided a comment, which of the following categories does your comment belong to? Please select all that apply.

Language was easy to understand	1
It was clear what I needed to do	2
I had all the information I needed	3
The example provided was easy to understand	4
Don't know	88
Something else	99

**Q4b:** What made it difficult for you? Please be a detailed as possible.

Text
------

**Q4bi:** If you provided a comment, which of the following categories does your comment belong to? Please select all that apply.

Language was hard to understand	1
It was unclear what I needed to do	2
I had to go find extra information to complete the request	3
The example provided was hard to understand	4
Don't know	88
Something else	99

**Q5: ASK ALL CUSTOMERS**

Overall how easy or difficult was it to understand and do what you needed to in the Student loan section of myIR.

Very difficult	Quite difficult	Quite Easy	Very Easy	Don't know / can't remember
1	2	3	4	5
<b>Go to Q5b</b>	<b>Go to Q5b</b>	<b>Go to Q5a</b>	<b>Go to Q5a</b>	<b>Go to Thank you page</b>

Q5a: What made it easy for you? Please be as detailed as possible.

Text

**Q5ai:** If you have provided a comment, which of the following categories does your comment belong to? Please select all that apply. **RANDOMISE**

Language was easy to understand	1
Easy to find my way around	2
Easy to update my details	3
Easy to check my Loan balance	4
Easy to check alerts	5
Easy to use the calculator	6
Easy to check my correspondence	7
Easy to understand my loan breakdown	8
Easy to make a loan payment	9
Easy to understand assessments	10
Easy to add an alternative contact person	11
Easy to my check recent activity	12
Easy to check my travel movements	13
Don't know	88
Something else	99

**Q5b.** What made it difficult for you? Please be as detailed as possible.

Text

**Q5bi:** If you have provided a comment, which of the following categories does your comment belong to? Please select all that apply. **RANDOMISE**

Language was hard to understand	1
Hard to find my way around	2
Hard to update my details	3
Hard to check my Loan balance	4
Hard to use the Loan calculator	6
Hard to check alerts	5
Hard to check my correspondence	7
Hard to understand my loan breakdown	8
Hard to make a loan payment	9
Hard to understand assessments	10
Hard to add an alternative contact person	11
Hard to my check recent activity	12
Hard to check my travel movements	13
Don't know	88
Something else	99

**THANK YOU PAGE**

Thanks for your feedback. Your time is appreciated.

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## Tax Agents – Voice of the customer

Research New Zealand #5250

Last updated: 27 June 2022

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Good morning/afternoon/evening, could I please talk to (person named on list)?

Good morning/afternoon/evening, I am calling on behalf of Inland Revenue. My name is [xx] from Research New Zealand. We realise this may not be a good time due to the Covid situation, but we are conducting research on behalf of Inland Revenue about the services they provide to tax agents.

The survey is voluntary, confidential and will take no more than 10 minutes. When would suit, or is now a good time?

**IF PERSON NOT AVAILABLE, ASK:**

When would be a good time for me to call back to speak to him/her?

**MAKE APPOINTMENT**

**Background information only if needed:**

- This is genuine research. I'm not selling anything.
- If you would like more information about Research New Zealand, please visit our website at [Researchnz.com](https://researchnz.com)
- Research New Zealand is contracted to provide research services to Inland Revenue and is authorised to act as its 'agent' in this regard. Under Principle 11 (h) (ii) of the Privacy Act 1993, Inland Revenue is able to provide us with specific client contact information for approved research purposes.
- Your business was randomly selected from Inland Revenue's database to participate in a survey of tax agents.
- The purpose of the survey is to gather information from tax agents about the services they receive from Inland Revenue to see how well they are meeting their needs and if there are any areas in which they could improve.
- Information provided is confidential. We only report summary results about groups of businesses; we do not identify which businesses have said what.

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READ

This call is being recorded for training and quality control purposes.

Q1.1 Interview date [dd/mm/yyyy]

Q1.2 Calendar month and year

01.... Jan 2019	21 .... Sep 2020	41 ....May 2022	61.... Jan 2024
02.... Feb 2019	22 .... Oct 2020	42 ....Jun 2022	62.... Feb 2024
03.... Mar 2019	23 ....Nov 2020	43 ....Jul 2022	63.... Mar 2024
04.... Apr 2019	24 ....Dec 2020	44 ....Aug 2022	64.... Apr 2024
05.... May 2019	25 ....Jan 2021	45 ....Sep 2022	65.... May 2024
06.... Jun 2019	26 ....Feb 2021	46 ....Oct 2022	66.... Jun 2024
07.... Jul 2019	27 ....Mar 2021	47 ....Nov 2022	67.... Jul 2024
08.... Aug 2019	28 ....Apr 2021	48 ....Dec 2022	68.... Aug 2024
09.... Sep 2019	29 ....May 2021	49 ....Jan 2023	69.... Sep 2024
10.... Oct 2019	30 ....Jun 2021	50 ....Feb 2023	70.... Oct 2024
11.... Nov 2019	31 ....Jul 2021	51 ....Mar 2023	71.... Nov 2024
12.... Dec 2019	32 ....Aug 2021	52 ....Apr 2023	72.... Dec 2024
13.... Jan 2020	33 ....Sep 2021	53 ....May 2023	73.... Jan 2025
14.... Feb 2020	34 ....Oct 2021	54 ....Jun 2023	74.... Feb 2025
15.... Mar 2020	35 ....Nov 2021	55 ....Jul 2023	75.... Mar 2025
16.... Apr 2020	36 ....Dec 2021	56 ....Aug 2023	76.... Apr 2025
17.... May 2020	37 ....Jan 2022	57 ....Sep 2023	77.... May 2025
18.... Jun 2020	38 ....Feb 2022	58 ....Oct 2023	78.... Jun 2025
19.... Jul 2020	39 ....Mar 2022	59 ....Nov 2023	79.... Jul 2025
20.... Aug 2020	40 ....Apr 2022	60 ....Dec 2023	80.... Aug 2025

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**Core questions: Experience and Interactions with Inland Revenue**

Q2.2 These first few questions are about your general views and opinions of Inland Revenue, as a tax agent. Overall, how would you rate your experience with Inland Revenue? Would you say you are..

READ

- 1..... Very satisfied
- 2..... Satisfied
- 3..... Somewhat satisfied
- 4..... Neither dissatisfied nor satisfied
- 5..... Somewhat dissatisfied
- 6..... Dissatisfied
- 7..... Very dissatisfied
- 98.... Unsure **\*\*DO NOT READ\*\***

Q2.3 **ASK IF Q2.2=5-7** What are the main reasons you are dissatisfied? Please be as detailed as possible **PROBE FULLY**

- 1..... Answer **SPECIFY**

Q2.4 **ASK IF Q2.2=1-2** What are the main reasons you are satisfied? Please be as detailed as possible **PROBE FULLY**

- 1..... Answer **SPECIFY**

Q2.5 **ASK IF Q2.2=3-4** What could make you more satisfied? Please be as detailed as possible **PROBE FULLY**

- 1..... Answer Specify

Q2.6 How often do you use Inland Revenue's services? This includes using myIR, contact with your account manager, the call centre, and the website. Is it...**READ**

- 1..... Most days
- 2..... A few times a week
- 3..... A few times a month
- 4..... A few times a year
- 5..... Once a year or less
- 98.... Unsure **\*\*DO NOT READ\*\***

Q2.7 Which of the following Inland Revenue services have you used in the past three months? Have you...

**READ, CODE MANY**

- 1..... Used myIR
- 2..... Called the IR contact centre
- 3..... Had contact with your IR Account manager
- 4..... Attended a seminar
- 5..... Attended a webinar
- 6..... Viewed an on-demand video
- 7..... Filed returns with Inland Revenue using accounting software
- 8..... Visited Inland Revenue's website (other than using myIR)
- 9..... Received an Agent Answers newsletter
- 97.... None of these **\*\*DO NOT READ\*\***
- 98.... Unsure **\*\*DO NOT READ\*\***
- 96.... Other - specify **\*\*DO NOT READ\*\***

**SKIP TO: END OF BLOCK IF Q2.7 = NONE OF THESE**

**SKIP TO: END OF BLOCK IF Q2.7 = UNSURE**



ASK THIS QUESTION IF OTHER - SPECIFY IS NOT SELECTED IN Q2.7 AND THE NUMBER OF RESPONSES IN Q2.7 EQUALS 1

- Q2.8 These next few questions will be about the most recent interaction you had with Inland Revenue via [RESPONSE SELECTED IN Q2.7]. What was the MAIN reason for [RESPONSE SELECTED IN Q2.7] on this occasion? PROMPT IF NECESSARY: What were you wanting to do, or find out?  
PRE-CODED LIST - DO NOT READ

- 9..... Checking/reviewing transactions for a single client
- 1..... Filing or correcting tax returns (e.g. GST, Income Tax, Provisional Tax)
- 2..... Looking for information by yourself
- 3..... Managing a client's account (e.g. looking up their contact details/account history/income summary, or making a query a client's behalf)
- 23.... Dealing with PAYE or payroll/ Payday filing
- 8..... Checking or responding to client correspondence/communications
- 4..... Using secure email/ responding to an email message from IR
- 5..... Checking balances/transactions for multiple clients (Pulling client & agency reports)
- 6..... Looking for information with IR's help
- 11.... Adding or removing clients from our agency's client list (Linking or delinking clients)
- 96.... Other (SPECIFY)
- 98.... Don't remember

ASK THIS QUESTION IF OTHER - SPECIFY IS NOT SELECTED IN Q2.7 AND THE NUMBER OF RESPONSES IN Q2.7 EQUALS 1

- Q2.9 Thinking about whether you got what you needed from [RESPONSE SELECTED IN Q2.7]? Did you get ...  
READ LIST

- 1..... All of what you needed
- 2..... Most
- 3..... Some
- 4..... A little
- 5..... Or none of what you needed
- 98.... Unsure \*\*DO NOT READ\*\*

ASK THIS QUESTION IF OTHER - SPECIFY IS NOT SELECTED IN Q2.7 AND THE NUMBER OF RESPONSES IN Q2.7 EQUALS 1

- Q2.10 How easy or difficult was it to get what you needed? Was it...  
READ LIST

- 1..... Very easy
- 2..... Easy
- 3..... Somewhat easy
- 4..... Neither easy nor difficult
- 5..... Somewhat difficult
- 6..... Difficult
- 7..... Very difficult
- 98.... Unsure \*\*DO NOT READ\*\*

ASK THIS QUESTION IF OTHER - SPECIFY IS NOT SELECTED IN Q2.7 AND THE NUMBER OF RESPONSES IN Q2.7 EQUALS 1

- Q2.11 What one thing could Inland Revenue have done to improve your experience with this service? Please be as detailed as possible.

PROBE FOR CLARITY, RECORD VERBATIM

- 1..... Answer SPECIFY

ASK THIS QUESTION IF THE NUMBER OF RESPONSES IN Q2.7 IS GREATER THAN 1.  
CARRY FORWARD RESPONSES SELECTED IN Q2.7

Q2.12 Which ONE of those did you use or do most recently? SHOW OPTIONS SELECTED AT Q2.7.

READ IF NECESSARY

- 1..... Used myIR
- 2..... Called the IR contact centre
- 3..... Had contact with your IR Account manager
- 4..... Attended a seminar
- 5..... Attended a webinar
- 6..... Viewed an on-demand video
- 7..... Filed returns with Inland Revenue using accounting software
- 8..... Visited Inland Revenue's website (other than using myIR)
- 9..... Received an Agent Answers newsletter
- 10.... None of these \*\*DO NOT READ\*\* GO TO Q3.1
- 11.... Unsure \*\*DO NOT READ\*\* GO TO Q3.1
- 12.... Other - SPECIFY \*\*DO NOT READ\*\*

SKIP TO: Q2.17 IF Q2.12 = NONE OF THESE

SKIP TO: Q2.17 IF Q2.12 = UNSURE

ASK THIS QUESTION IF OTHER - SPECIFY IS NOT SELECTED IN Q2.12 AND THE NUMBER OF RESPONSES IN Q2.7 IS GREATER THAN 1

Q2.13 These next few questions will be about the most recent interaction you had with Inland Revenue via [RESPONSE SELECTED IN Q2.12]. What was the MAIN reason for using [RESPONSE SELECTED IN Q2.12] on this occasion?

PRE-CODED LIST – DO NOT READ

- 9..... Checking/reviewing transactions for a single client
- 1..... Filing or correcting tax returns (e.g. GST, Income Tax, Provisional Tax)
- 2..... Looking for information by yourself
- 3..... Managing a client's account (e.g. looking up their contact details/account history/income summary, or making a query a client's behalf)
- 23.... Dealing with PAYE or payroll/ Payday filing
- 8..... Checking or responding to client correspondence/communications
- 4..... Using secure email/ responding to an email message from IR
- 5..... Checking balances/transactions for multiple clients (Pulling client & agency reports)
- 6..... Looking for information with IR's help
- 11.... Adding or removing clients from our agency's client list (Linking or delinking clients)
- 96.... Other (SPECIFY)
- 98.... Don't remember

ASK THIS QUESTION IF OTHER - SPECIFY IS NOT SELECTED IN Q2.12 AND THE NUMBER OF RESPONSES IN Q2.7 IS GREATER THAN 1

Q2.14 Thinking about whether you got what you needed from [RESPONSE SELECTED IN Q2.12]? Did you get ...

READ LIST

- 1..... All of what you needed
- 2..... Most
- 3..... Some
- 4..... A little
- 5..... Or none of what you needed
- 98.... Unsure \*\*DO NOT READ\*\*

ASK THIS QUESTION IF OTHER - SPECIFY IS NOT SELECTED IN Q2.12 AND THE NUMBER OF RESPONSES IN Q2.7 IS GREATER THAN 1

Q2.15 How easy or difficult was it to get what you needed? Was it...

READ LIST

- 1..... Very easy
- 2..... Easy
- 3..... Somewhat easy
- 4..... Neither easy nor difficult
- 5..... Somewhat difficult
- 6..... Difficult
- 7..... Very difficult
- 98.... Unsure **\*\*DO NOT READ\*\***

ASK THIS QUESTION IF OTHER - SPECIFY IS NOT SELECTED IN Q2.12 AND THE NUMBER OF RESPONSES IN Q2.7 IS GREATER THAN 1

Q2.16 What one thing could Inland Revenue have done to improve your experience with this service? Please be as detailed as possible.

PROBE FOR CLARITY, RECORD VERBATIM

- 1..... Answer SPECIFY

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**New core questions added 1 Jul 2022**

**RANDOMISE ORDER THAT Q2.17-18, Q2.19 & Q2.20 ARE PRESENTED BETWEEN RESPONDENTS.**

Q2.17 That's all the questions about your most recent interaction. Now thinking more generally about the dealings you've had with Inland Revenue in the last three months.

Overall, how satisfied are you with the consistency of advice you've received from Inland Revenue in the last three months? Would you say you are..

READ

- 1..... Very satisfied
- 2..... Satisfied
- 3..... Somewhat satisfied
- 4..... Neither dissatisfied nor satisfied
- 5..... Somewhat dissatisfied
- 6..... Dissatisfied
- 7..... Very dissatisfied
- 99.... Unsure **\*\*DO NOT READ\*\***

**ASK THIS QUESTION IF Q2.17=5-7**

Q2.18 What were the specific areas of advice that you were [RESPONSE SELECTED IN Q2.17] with Inland Revenue's consistency? Please be as detailed as possible

PROBE FULLY

- 1..... Answer **SPECIFY**

Q2.19 Overall, how satisfied are you with Inland Revenue's promptness at responding to your queries in the last three months? Would you say you are..

READ

- 1..... Very satisfied
- 2..... Satisfied
- 3..... Somewhat satisfied
- 4..... Neither dissatisfied nor satisfied
- 5..... Somewhat dissatisfied
- 6..... Dissatisfied
- 7..... Very dissatisfied
- 99.... Unsure **\*\*DO NOT READ\*\***

Q2.20 Over the last three months, how satisfied are you that Inland Revenue always follows redirect instructions about sending communications to you as their tax agent? Would you say you are..

READ

- 1..... Very satisfied
- 2..... Satisfied
- 3..... Somewhat satisfied
- 4..... Neither dissatisfied nor satisfied
- 5..... Somewhat dissatisfied
- 6..... Dissatisfied
- 7..... Very dissatisfied
- 99.... Unsure **\*\*DO NOT READ\*\***

**End of Block: Core questions**

**Start of Block: Ad hoc questions**

Q3.1 to Q3.2 included for the following dates:

- 05 to 27 Feb 2019
- 11 Aug to 02 Sep 2020
- 06 to 28 Oct 2020

Scheduled to be included again for four weeks in late Oct or early Nov 2021

Q3.1 I'm going to read out a range of services that Inland Revenue has for agents. Using a scale of "Extremely important", "somewhat important", "not that important", or "not important at all", please tell me how important is... RDN

READ OUT STATEMENTS

	Extremely important	Somewhat important	Not that important	Not at all important	DO NOT READ	
					Unsure	Not applicable
myIR (Inland Revenue's online service) (1)	1	2	3	4	98	97
Inland Revenue's Contact Centre (2)	1	2	3	4	98	97
Your Inland Revenue Account Manager (3)	1	2	3	4	98	97
Inland Revenue seminars for tax agents (4)	1	2	3	4	98	97
Inland Revenue webinars for tax agents (5)	1	2	3	4	98	97
Website help videos (6)	1	2	3	4	98	97
Website information videos (7)	1	2	3	4	98	97
Filing returns with Inland Revenue through your accounting software (8)	1	2	3	4	98	97
Inland Revenue's website (9)	1	2	3	4	98	97
Support with client audits (10)	1	2	3	4	98	97
Agent Answers newsletter (11)						

Q3.2 Now please rate Inland Revenue's performance on each of the services, based on your experience as a tax agent. Using a scale of "Very good", "good", "average", "poor", "Very poor"... How do you rate...RDN

READ OUT STATEMENTS

	Very good	Good	Average	Poor	Very poor	DO NOT READ	
						Don't know	Haven't used
myIR (Inland Revenue's online service) (1)	1	2	3	4	5	98	97
Inland Revenue's Contact Centre (2)	1	2	3	4	5	98	97
Your Inland Revenue Account Manager (3)	1	2	3	4	5	98	97
Inland Revenue seminars for tax agents (4)	1	2	3	4	5	98	97
Inland Revenue webinars for tax agents (5)	1	2	3	4	5	98	97
Website help videos (6)	1	2	3	4	5	98	97
Website information videos (7)	1	2	3	4	5	98	97
Filing returns with Inland Revenue through your accounting software (8)	1	2	3	4	5	98	97
Inland Revenue's website (9)	1	2	3	4	5	98	97
Support with client audits (10)	1	2	3	4	5	98	97
Agent Answers newsletter (11)	1	2	3	4	5	98	97

Q3.3 to Q3.7 included for the following dates:

- 05 to 27 Mar 2019

**REVERSE ORDER OF RATING SCALE BETWEEN RESPONDENTS**

Q3.3 We'd like you to think now about your myIR workspace. How easy or difficult is it to get into your client's accounts? Was it...

**READ LIST**

- 1..... Very easy
- 2..... Easy
- 3..... Somewhat easy
- 4..... Neither easy nor difficult
- 5..... Somewhat difficult
- 6..... Difficult
- 7..... Very difficult
- 98.... Unsure **\*\*DO NOT READ\*\***

Q3.4 And thinking now about myIR alerts and notifications, using the same scale how easy or difficult is it to...

**REPEAT SCALE AGAIN ONLY IF NECESSARY:** Very easy, easy, somewhat easy, neither easy nor difficult, somewhat difficult, difficult, very difficult.

**READ OUT STATEMENTS**

	Very easy	Easy	Somewhat easy	Neither easy nor difficult	Somewhat difficult	Difficult	Very difficult	DO NOT READ Don't know
Identify which client an alert or notification relates to (1)	1	2	3	4	5	6	7	98
Manage correspondence from Inland Revenue within your agency (2)	1	2	3	4	5	6	7	98
Customise who receives letters or notifications from Inland Revenue (3)	1	2	3	4	5	6	7	98

Q3.5 We'd like you to think about times when your clients have a tax liability with Inland Revenue, and it hasn't been paid. You are notified first, and then 10 days later both you and your client are informed about the amount owed. Do you think the ten days...?

**READ LIST**

- 1..... is about right
- 2..... is not enough
- 3..... Or you don't mind either way

**ASK THIS QUESTION IF Q3.5 = ...IS NOT ENOUGH**

Q3.6 Would you like it to be extended...?

**READ LIST**

- 1..... to 12 days
- 2..... or to more than 12

**ASK THIS QUESTION IF Q3.6 = OR TO MORE THAN 12 DAYS**

Q3.7 How many days should it be extended to?

**PROBE FOR SINGLE NUMBER**

- 1..... Answer **SPECIFY [WHOLE NUMBER, FORMAT – ONE DIGIT, ZERO DECIMALS]**

Q3.8 to Q3.12 included between the following dates:

- 02 to 24 Apr 2019

Q3.8 The next questions are about requesting client instalment arrangements with Inland Revenue on behalf of your clients. Have you requested an instalment arrangement at any time in the last 6 months?

- 1..... Yes
- 2..... No
- 98.... Don't know

SKIP TO: END OF BLOCK IF Q3.8 ≠ YES

ASK THIS QUESTION IF Q3.8 = YES

Q3.9 Did you make your most recent request for an arrangement through...?

READ LIST

- 1..... myIR
- 2..... the Contact Centre
- 3..... or through Inland Revenue's website

Q3.10 How easy or difficult was it to request the instalment arrangement through [response selected in Q3.9]? Was it...

READ LIST

- 1..... Very easy
- 2..... Easy
- 3..... Somewhat easy
- 4..... Neither easy nor difficult
- 5..... Somewhat difficult
- 6..... Difficult
- 7..... Very difficult
- 98.... Unsure **\*\*DON'T READ\*\***

ASK THIS QUESTION IF Q3.9 = MYIR AND Q3.10 ≠ UNSURE OR Q3.10 = VERY EASY

Q3.11 What would have made the instalment arrangement process easier for you? Please be as detailed as possible

PROBE FOR CLARITY, RECORD VERBATIM

- 1..... Answer **SPECIFY**

ASK THIS QUESTION: IF Q3.9 = THE CONTACT CENTRE

Q3.12 For what reasons did you request an instalment arrangement through the Contact Centre instead of using myIR? Please be as detailed as possible.

PROBE FOR CLARITY, RECORD VERBATIM

- 1..... Answer **SPECIFY**

Q3.13 to Q3.15 included for the following dates

- 07 to 28 Aug 2019

Q3.13 Which of the following did you use to find information on the changes IR made earlier this year?

READ LIST

- 1..... Seminars
- 2..... Webinars
- 3..... One-on-one sessions with Community Compliance Account Managers
- 4..... Tax Agent 0800 line
- 5..... Phone or email contact with Community Compliance Account Managers
- 6..... Top Solutions for Tax Agents internet page
- 7..... Professional Body or Significant Enterprise Engagements
- 8..... Agents Answers newsletter
- 9..... Email updates
- 10.... Media and marketing updates
- 96.... Other (SPECIFY) \*\*DO NOT READ\*\*
- 98.... Unsure \*\*DO NOT READ\*\*

SKIP TO: END OF BLOCK IF Q3.13 = OTHER SPECIFY  
SKIP TO: END OF BLOCK IF Q3.13 = UNSURE.

ASK THIS QUESTION IF THE NUMBER OF RESPONSES IN Q3.13 IS GREATER THAN 1. THEN CARRY FORWARD  
RESPONSES SELECTED IN Q3.13

Q3.14 Of these, which was your most preferred?

READ LIST

- 1..... Seminars
- 2..... Webinars
- 3..... One-on-one sessions with Community Compliance Account Managers
- 4..... Tax Agent 0800 line
- 5..... Phone or email contact with Community Compliance Account Managers
- 6..... Top Solutions for Tax Agents internet page
- 7..... Professional Body or Significant Enterprise Engagements
- 8..... Agents Answers newsletter
- 9..... Email updates
- 10.... Media and marketing updates
- 96.... Other
- 98.... Unsure \*\*DO NOT READ\*\*

Q3.15 What made it your most preferred?

PROBE FOR CLARITY, RECORD VERBATIM

- 1..... Answer SPECIFY



Q3.16 to Q3.19 included for the following dates

- 16 Jun to 08 Jul 2020

Q3.16 There are different ways Inland Revenue sends you information about your tax. Normally we'll send web and receive messages through myIR where you log in to view correspondence from us. In some instances though, for example with a compliance matter, we may email you information like this directly. We're interested in understanding how comfortable customers feel being emailed their tax information directly in these situations.

How comfortable are you with IR sending tax information directly to you by email? Are you...

READ LIST

- 1..... Very comfortable
- 2..... Quite comfortable
- 3..... Not that comfortable
- 4..... Not at all comfortable
- 98.... Don't know/Unsure **\*\*DO NOT READ\*\***

ASK THIS QUESTION IF Q3.16 ≠ VERY COMFORTABLE

Q3.17 For what reasons wouldn't you feel very comfortable? Please be as detailed as possible.

PROBE FOR CLARITY, RECORD VERBATIM

- 1..... Answer **SPECIFY**

Q3.18 How safe do you feel your information is if Inland Revenue communicate with you in this way?

READ LIST

- 1..... Very safe
- 2..... Quite safe
- 3..... Not that safe
- 4..... Not at all safe
- 98.... Don't Know/Unsure **\*\*DO NOT READ\*\***

Q3.19 How often do you think Inland Revenue should confirm your preferred email address with you?

READ LIST

- 1..... Once a year
- 2..... Once every 2 years
- 3..... Once every 3 years
- 4..... Once every 4 years
- 5..... Once every 5 years
- 6..... Never- use it unless you let Inland Revenue know otherwise

Q3.20 to Q3.23 included for the following dates:

- 23 Feb to 14 Apr 2021

Q3.20 The next few questions are about advice you have received from Inland Revenue. Have you ever received conflicting, inconsistent, or inaccurate advice from Inland Revenue?

READ LIST

- 1..... Yes
- 2..... No
- 98.... Not sure/I don't remember **\*\*DO NOT READ\*\***

ASK THIS QUESTION IF Q3.20 = YES

Q3.21 Thinking back to the most recent occasion when you received conflicting, inconsistent, inaccurate advice from Inland Revenue, how long ago was that? Was it...

READ LIST

- 1..... Within the last 3 months
- 2..... More than 3 months but less than 6 months ago
- 3..... more than 6 but less than 12 months ago
- 4..... Over 12 months ago
- 98.... Not sure/I don't remember **\*\*DO NOT READ\*\***

ASK THIS QUESTION IF Q3.21 ≠ OVER 12 MONTHS AGO AND Q3.21 ≠ NOT SURE/I DON'T REMEMBER

Q3.22 Was that advice given over the phone, in a web message, in a personal email to you, or was it given in some other way?

PRE-CODED LIST – DO NOT READ

- 1..... Over the phone
- 2..... Web message
- 3..... Personal email
- 96.... Given some other way (specify)
- 98.... Not sure/I don't remember **\*\*DO NOT READ\*\***

ASK THIS QUESTION IF Q3.21 ≠ OVER 12 MONTHS AGO AND Q3.21 ≠ NOT SURE/I DON'T REMEMBER

Q3.23 What was the topic or issue you were seeking advice on?

PROBE FOR CLARITY, RECORD VERBATIM. NB: PROBE FOR CLARITY ON TOPIC, THEN PROBE FOR NATURE OF INCONSISTENT ADVICE

- 1..... Answer SPECIFY

Q3.24 to Q3.26 included for the following dates:

- 23 Jul to 17 Aug 2021

Q3.24 In October this year there will be an upgrade to myIR; including simpler navigation, an upgrade of the Tax Preparer tab to a new Intermediary Centre, and centralised alerts. Before I mentioned this, were you aware of this change?

READ LIST

- 1..... Yes
- 2..... No
- 98.... Unsure **\*\*DO NOT READ\*\***

REVERSE ORDER OF RATING SCALE BETWEEN RESPONDENTS

Q3.25 Overall, how positive or negative do you believe this change will be? Will it be...

READ LIST

- 1..... Very positive
- 2..... Positive
- 3..... Somewhat positive
- 4..... Neutral
- 5..... Somewhat negative
- 6..... Negative
- 7..... Very negative

Q3.26 For what reasons have you given this rating?

PROBE FOR CLARITY, RECORD VERBATIM

- 1..... Answer **SPECIFY**

Notes for interviewers:

- Probe for clarity on whether rating relates to the myIR change itself, or of IR's process for introducing the change.
- If it relates to the myIR change itself, probe for clarity on how the change will impact on the individual agent or their work practices.
- If a negative rating relates to the process of change, probe for clarity on what IR should do to make the process work better for agents.

End of Block: Ad hoc questions

**Start of Block: Survey close questions**

ASK THIS QUESTION IF Q2.9 = OR NONE OF WHAT YOU NEEDED AND Q2.10 = VERY DIFFICULT

Q4.1 Earlier you said you had not got what you needed with the most recent contact and found it very difficult. Would you like someone from Inland Revenue to call you to discuss this?

READ LIST

1..... Yes

2..... No

Q4.2 So we can make sure the right person contacts you, can you please tell me a bit about your negative experience?

PROBE FOR CLARITY, RECORD VERBATIM

1..... Answer SPECIFY

Q4.3 We are almost at the end of the survey, but before you go would you be willing to be contacted by Research New Zealand or Inland Revenue in the next few months to help with other agent research or to test new services?

1..... Yes

2..... No

Q4.4 Those are all the questions I have. Thank you very much for your help. My name is INTERVIEWER NAME from Research New Zealand. If you have enquiries about this survey, please ring the Project Manager, s 9(2)(a) on our toll-free number: 0800 500 168.

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**Start of Block: IR administrative data**

- Q5.1 research\_id [IRMMYY###]
- Q5.2 firm\_size
- Q5.3 age\_individual
- Q5.4 age\_band
- Q5.5 age\_business
- Q5.6 gst\_turnover\_rty
- Q5.7 gst\_turnover\_band
- Q5.8 employee\_count
- Q5.9 employees\_band
- Q5.10 number\_active\_agents
- Q5.11 agent\_band
- Q5.12 entity\_desc\_short
- Q5.13 entity\_description
- Q5.14 entity\_class
- Q5.15 segment
- Q5.16 professional\_org\_name
- Q5.17 npo
- Q5.18 SIC\_CODE\_DESC
- Q5.19 SIC\_GROUPING\_LEVEL\_1
- Q5.20 Weight

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# Tax Counsel Office Survey

---

## Start of Block: Public Items

Q1 The Public Statements service issue binding public rulings, interpretation statements and guidelines, standard practice statements and operational statements.

Using the scale provided, let us know what you think of the items produced by the Public Statements service.

---

Q2 Items are relevant and useful to me and my clients.

- Never (1)
  - Rarely (2)
  - Sometimes (3)
  - Usually (4)
  - Always (5)
  - Not applicable (6)
- 

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Q3 I use the items in my work.

- Never (1)
  - Rarely (2)
  - Sometimes (3)
  - Usually (4)
  - Always (5)
  - Not applicable (6)
- 

Q4 Items demonstrate sound technical thinking, research and analysis.

- Never (1)
  - Rarely (2)
  - Sometimes (3)
  - Usually (4)
  - Always (5)
  - Not applicable (6)
- 

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Q5 Items reflect impartial decision making.

- Never (1)
  - Rarely (2)
  - Sometimes (3)
  - Usually (4)
  - Always (5)
  - Not applicable (6)
- 

Q6 Items consider all arguments and viewpoints.

- Never (1)
  - Rarely (2)
  - Sometimes (3)
  - Usually (4)
  - Always (5)
  - Not applicable (6)
- 

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Q7 Items are easy to understand and apply.

- Never (1)
  - Rarely (2)
  - Sometimes (3)
  - Usually (4)
  - Always (5)
  - Not applicable (6)
- 

Q8 Items are relevant to my or my clients' tax situations.

- Never (1)
  - Rarely (2)
  - Sometimes (3)
  - Usually (4)
  - Always (5)
  - Not applicable (6)
- 

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Q9 Items remove uncertainty and improve compliance.

- Never (1)
  - Rarely (2)
  - Sometimes (3)
  - Usually (4)
  - Always (5)
  - Not applicable (6)
- 

Q10 Items are clearly presented and formatted.

- Never (1)
  - Rarely (2)
  - Sometimes (3)
  - Usually (4)
  - Always (5)
  - Not applicable (6)
- 

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Q11 Items are completed in a timely manner.

- Never (1)
- Rarely (2)
- Sometimes (3)
- Usually (4)
- Always (5)
- Not applicable (6)

---

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End of Block: Public Items

---

Start of Block: Consultation

Q12 The Public Statements service aim to produce items that accurately and fairly reflect taxation laws and are useful to taxpayers and their advisors. Getting feedback on draft items through public consultation is a key part of the process.

Using the scale provided, let us know what you think of the consultation of public items.

---

Q13 I have provided comments on consultation drafts.

- Never (1)
  - Rarely (2)
  - Sometimes (3)
  - Usually (4)
  - Always (5)
  - Not applicable (6)
- 

Q14 Having the opportunity to comment on consultation drafts is desirable.

- Never (1)
- Rarely (2)
- Sometimes (3)
- Usually (4)
- Always (5)
- Not applicable (6)

---

Q15 Your usual consultation period of 4-6 weeks is adequate to think about issues and provide comment.

- Never (1)
- Rarely (2)
- Sometimes (3)
- Usually (4)
- Always (5)
- Not applicable (6)

---

Q16 When I provide comments, you communicate well with me during and after the consultation process.

- Never (1)
- Rarely (2)
- Sometimes (3)
- Usually (4)
- Always (5)
- Not applicable (6)

Q17 I feel my feedback has been appreciated and fairly considered.

- Never (1)
- Rarely (2)
- Sometimes (3)
- Usually (4)
- Always (5)
- Not applicable (6)

---

Page Break

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End of Block: Consultation

---

Start of Block: Block 3



Q18 Where do you hear about and read consultation drafts and finalised items through? Select all that apply.

- The Tax Information Bulletin (1)
  - Inland Revenue's Tax Technical website (2)
  - Notification emails (3)
  - The fortnightly Public Consultation newsletter (4)
  - NZ Government - Engaging with Government Consultations website (5)
  - Publishers' websites (6)
  - Other, specify (7)
- 



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Q19 Where do you prefer to hear about and read consultation drafts and finalised items through? Select one.

- The Tax Information Bulletin (1)
- Inland Revenue's website (2)
- Notification emails with item attached (3)
- The Fortnightly Public Consultation newsletter (4)
- NZ Government - Engaging with Government Consultations website (5)
- Publishers' websites (6)
- Other, specify (7) \_\_\_\_\_

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Q23 Should Inland Revenue issue more public statements than it currently does?

No (1)

Yes (2)

---

Q24 Why do you think so?

---

---

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Page Break

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End of Block: Overall Satisfaction

---

Start of Block: Comments

Q25 Please feel free to make any further comments that you think will help us improve our products and processes.

---

---

---

---

---

End of Block: Comments

---

Start of Block: Profile

Q26 Lastly, which of these categories best describes you?

- Small to medium sized tax agent/advisor (1)
- Large tax agent/advisor employee (2)
- Large tax agent/advisor principal (3)
- Small to medium taxpayer (4)
- Large corporate taxpayer (5)
- Inland Revenue staff member (6)
- Other - please specify (7)

---

End of Block: Profile

---

Start of Block: Contact

Q27 Do you wish to be contacted about your survey responses?

- No (1)
- Yes (2)

---

*Display This Question:*

*If Do you wish to be contacted about your survey responses? = Yes*

Q28 Please provide your best contact details.

- Name (1) \_\_\_\_\_
- Email address (2) \_\_\_\_\_
- Phone (3) \_\_\_\_\_

---

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End of Block: Contact

---

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# Tax Publication Subscriber Survey

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Start of Block: SURVEY START BLOCK

By July this year, we will introduce a new subscription service that will replace and consolidate the various tax newsletters and publications you subscribe to. This includes our **Agents Answers, Public Consultations, Technical Information Bulletin**, etc. So we get it right, we greatly appreciate your feedback on some design concepts and ideas we are considering. Your feedback helps us shape our future newsletters and publications.

- Q1 For each Inland Revenue tax publication listed below, please select if you:
- (a) currently subscribe to it, or
  - (b) do not subscribe but the publication looks interesting to you, or

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(c) do not subscribe and the publication is not interesting to you, or  
 (d) do not know about it

	(a) Yes, I am a subscriber (1)	(b) Do not subscribe but interested (2)	(c) Do not subscribe and not interested (3)	(d) Do not know it (4)
Agents Answers (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tax Intermediary Updates (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Important Messages for Tax Intermediaries (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Public Consultations (Tax Technical consultations and latest publications) (4)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tax Policy Announcements (updates) (5)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tax Information Bulletin (TIB) (6)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tax Technical Publication email notifications (sent when a new Tax Technical Publication is released) (7)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tax Technical Consultation email notification (sent when a new Tax Technical Consultation is released) (8)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

End of Block: SURVEY START BLOCK

Start of Block: GENERAL QUESTIONS BLOCK

Q2 We will start with some general questions about the current tax publications you receive from Inland Revenue.

Overall, how satisfied are you with the current tax publications you receive?

	Very dissatisfied (1)	Dissatisfied (2)	Neutral (3)	Satisfied (4)	Very satisfied (5)	Don't know / no opinion (6)
Your overall satisfaction? (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q3 How often do you read or use the tax publications we send you?

	Never (1)	Rarely (2)	Sometimes (3)	Often (4)	Always (5)	Don't know / no opinion (6)
How Often? (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q5 How relevant to you is the information contained within the tax publications we send?

	Not at all relevant (1)	Not very relevant (2)	Neutral (3)	Relevant (4)	Very relevant (5)	Don't know / no opinion (6)
How Relevant? (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

End of Block: GENERAL QUESTIONS BLOCK

Start of Block: TAX AGENT BLOCK

Tax Agent Start Text The following questions are about the Tax Agent community publications, including our **Agent Answers**, **Agents Issues**, and **Tax Intermediaries Updates**. This excludes our letters sent to you through our **Important Messages** email, which continue to be sent as required, but with a new design.

We are going to show you four different formats and ask which you prefer, then ask questions about features or functions we are thinking of.



Common features with all formats includes: An option to save as a PDF file An option to receive this weekly, fortnightly or monthly All content will be published on the website as an **Update** item An **Important Updates** section, to provide one-line reminders of *important messages* sent during that time. We have four proposed formats for you to review.

*Click on each thumbnail image to enlarge the picture in a new browser tab, then close the tab when you have finished with it. Your survey progress is saved should you close the survey by mistake - just click on the survey invite to return.*

Click the **NEXT** button to proceed.

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Page Break

#### Tax Agent Option 1 **Tax Agent Option 1 - Summary Format**

Information is presented in a summary format, with a title that links to the Inland Revenue website where the full article can be read.

*Click on the image below to expand in a new browser tab, and close the new tab when you*

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have finished reviewing.

Option 1  
Tax Agent Summary Format

Inland Revenue  
Te Ari Take

Having trouble viewing this email? [View online](#)

**Ngā takawaenga me ētahi atu  
News and updates**  
25 January 2022

**Your preferences**

You are currently signed up to **Monthly updates**.  
Click here to change your subscription preferences.

**Tax agents | Ngā māngai tāke**

**Urgent updates**

Tax agents phone line (Expired)  
Resurgence Support Payment draft applications removed from myIR

For full disclosure, expired items are also noted

The category of update you have subscribed to

21 FEB 2022  
**Australian listed share exemption from the Foreign Investment Fund (FIF) rules**  
We have added a new tool to our website to replace the Foreign Investment Fund (FIF) exemption check that was removed in October 2021.

Hyperlink to website

Summary text

18 FEB 2022  
**Deferred (D) status requests**  
We're aware of an issue in myIR which is preventing logons with the 'User' access role from requesting deferred (D) status for clients that you are unable to file a return for by 31 March, due to exceptional circumstances.

17 FEB 2022  
**myIR alerts for EMP returns**  
myIR alerts showing for EMP returns marked as optional.

17 FEB 2022  
**Depreciation rate finder and calculator**  
We have added a new combined Depreciation rate finder and calculator to our website.

17 FEB 2022  
**Calculators and tools on our website**  
We've removed some calculators and tools from our website.

11 FEB 2022  
**Income tax return credit transfer requests**  
We have resolved the issue preventing some credit transfers requested in returns from being actioned.

10 FEB 2022  
**Support for Taranaki floods**  
Find out what support is available if you've been affected by the recent flooding in Taranaki.

04 FEB 2022  
**Letter issued incorrectly showing overdup returns**  
We are fixing an issue that has been identified with the letter that is issued when a client is delinked from an intermediary.

03 FEB 2022  
**Income insurance scheme consultation**  
The Government, Business New Zealand and the New Zealand Council of Trade Unions today announced the introduction of a new Zealand Income Insurance scheme to help support those Zealanders who are made redundant and laid off, or have to stop working because of a chronic condition or disability.

**Charities | Ngā kaupapa atahual**

31 FEB 2022  
**New RWT exemption register replacing certificates of exemption**  
We have introduced a new online RWT exemption register that lists the TRG number of all persons and organisations who are exempt from having RWT deducted from the interest and dividends they receive.  
[Read more](#)

This will be the only content listed if you have only subscribed to updates for Charities

Read more on [taxtechnical.govt.nz](#) **Save as PDF** Tax Technical

**Download as PDF**

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New Zealand Government**

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Te Kaitiaki Take Kōwhiri  
Te Kaitiaki Take Kōwhiri

**Beware of tax related scams**  
Inland Revenue will never send you an email requesting you to provide details or disclose confidential details through an unsecured email or text.  
You should always independently verify the source and target of letters before taking any action. If you receive a suspicious communication of this nature, do not respond to it or follow any links provided in the email or text.  
Please do not reply to this email as this information is not monitored.

OFFICIAL INFORMATION ACT UNDER THE ACT

Q6 If this publication was an option available from Inland Revenue, how desirable would it be to you?

	Not at all desirable (1)	Not very desirable (2)	Neutral (3)	Desirable (4)	Very Desirable (5)	Don't know / No opinion (6)
Desirability of Tax Agent Option - Summary Format (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Page Break

**Tax Agent Option 2 Tax Agent Option 2 - Detailed Format**

This format presents all information in detail, in much the same way detailed information is provided in our existing publications. This format means it is not necessary to go to the Inland Revenue website for more information. On occasions when individual articles are large, this publication may be longer than the example shown.

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Click on the image below to expand, and close when you have finished reviewing.

The screenshot displays the 'Tax Agent Detail Portal' with a 'News and updates' section. The page lists several articles with callout boxes providing additional context:

- For full details, please refer to the article below:** Points to the 'News and updates' header.
- The category of update you have subscribed to:** Points to the 'Tax agents | High impact lists' header.
- Hyperlink to website:** Points to a link in the 'Australian listed share exemption from the Foreign Investment Fund (FIF) rules' article.
- Full text of update, where appropriate, will be displayed. This is a summary of key information:** Points to the main text of the 'Australian listed share exemption...' article.

Articles listed include:

- Urgent updates:** The 2023-24 GDSR and DSRs.
- Australian listed share exemption from the Foreign Investment Fund (FIF) rules:** A new tool to help identify FIFs in Australian companies.
- Deferred (D) status requests:** Information on processing requests for D status.
- myIR alerts for RMP returns:** Alerts for RMP returns.
- Discretionary rate finder and calculator:** A new tool for discretionary rates.
- Calculators and tools on our website:** A list of available calculators.
- Income tax return credit transfer requests:** Information on credit transfers.
- Support for Tawashi Foods:** Support for the Tawashi Foods business.
- Letter issued incorrectly showing overdue return:** Information on a letter issued incorrectly.
- Income insurance scheme participation:** Information on income insurance schemes.
- Key features of the proposed New Zealand Income Insurance Scheme:** Key features of the proposed scheme.
- Charities | High impact advice:** High impact advice for charities.

At the bottom, there are links for 'Sign up for PDF' and 'Download as PDF'.

OFFICIAL INFORMATION ACT

Q7 If this publication was an option available from Inland Revenue, how desirable would it be to you?

	Not at all desirable (1)	Not very desirable (2)	Neutral (3)	Desirable (4)	Very Desirable (5)	Don't know / No opinion (6)
Desirability of Tax Agent Option 2 - Detailed Format (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Page Break

Tax Agent Option 3 **Tax Agent Option 3 - Consolidated Tax Summary Format** This is the same short summary format in Option 1, but adds the titles of all recent Tax Technical publications and a table view of all current consultations. This option enables you to receive information all in one place without needing to subscribe to both the TCO Public Consultations and Tax Policy Announcements newsletters.

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Click on the image below to expand, and close when you have finished reviewing.

Option 3  
Tax Agent Consolidated  
Tax Summary Format

Ngā tākawangā me rāhū āhu  
**News and updates**  
25 January 2022

**Tax agents | Ngā māngai tāke**

**Urgent updates**

**Taxagents@revenue.govt.nz** (Expired)

Revenue Support Payment draft applications removed from myIR

25 JAN 2022

**Australian listed share exemption from the Foreign Investment Fund (FIF) rules**

We have added a new tool to our website to replace the Foreign Investment Fund (FIF) exemption check that was removed in October 2021.

18 FEB 2022

**Deferred (D) status requests**

We are aware of an issue in myIR which is preventing users with the 'User' access role from requesting deferred (D) status for returns that you are unable to file a return for by 31 March, due to exceptional circumstances.

17 FEB 2022

**myIR alerts for EWP returns**

myIR alerts showing for EWP returns marked as optional.

17 FEB 2022

**Depreciation rate finder and calculator**

We have added a new combined Depreciation rate finder and calculator to our website.

17 FEB 2022

**Calculators and tools on our website**

We've removed some calculators and tools from our website.

11 FEB 2022

**Income tax return credit transfer requests**

We have resolved the issue preventing some credit transfers requested in returns from being entered.

18 FEB 2022

**Support for Taranaki floods**

Find out what support is available if you've been affected by the recent flooding in Taranaki.

04 FEB 2022

**Letter issued incorrectly showing overdue return**

We are fixing an issue that has been identified with the letter that is issued when a client is delinquent from an intermediary.

01 FEB 2022

**Income insurance scheme consultation**

The Government, Business New Zealand and the New Zealand Council of Trade Unions today announced proposals for a New Zealand Income Insurance scheme to help support New Zealanders who are made redundant and laid off, or have to stop working because of a health condition or disability.

**Charities | Ngā kaupapa āwhāhā**

11 FEB 2022

**New RWT exemption register replacing certificates of exemption**

We have introduced a new online RWT exemption register that allows the full number of all persons and organisations who are exempt from having RWT deducted from PAYE income and dividends they receive.

**Current consultations**

Consultation #	Topic to consult on	Deadline
ED0238	Options for an updated Technical Information System (TIS) for the Income Tax Law	28 February 2022
PUB0192	Options to indicate Policy Consultation - eg GST changes	30 March 2022
PUB0421	Income tax - Australian limited partnerships and foreign tax credits	14 April 2022

**Tax Technical Publications**

105 20191 Whether GST payable activity and whether to business

105 20193 GST - deemed consideration for taxable supply

PUB0421 Income tax - Australian limited partnerships and foreign tax credits

PUB0412 Income Tax - deemed foreign losses incurred due to COVID-19

105 20193 Taxpayers resolution process adjustments in notice of response

105 20193 Onebank Ltd

Tax Technical website update February 2022

Save as PDF | Tax Technical

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You have received this email because you registered your email address with MyIR Services. If you do not wish to receive these in the future, you can opt out by using the link below.

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Summary of tax related issues

Should business owners need you as a tax expert to help them with their tax-related issues, or do you have confidential data through an account?

You can find more information about the services we offer on our website. If you are a business owner, you can also find out more about the services we offer on our website.

Have a question? Contact us on 0800 800 100 or visit our website.

For full disclosure, expired items are also noted

The category of update you have subscribed to

Hyperlink to website

Full text of update item - alternatively, we could provide this as a summary to aid with skimming.

This will be the case content later if you have only subscriptions to updates for Charities

You can choose to include or exclude this section

You can choose to include or exclude this section

Combined table of all open consultations

Headline of all the news items including the date of publication and a link to the full article

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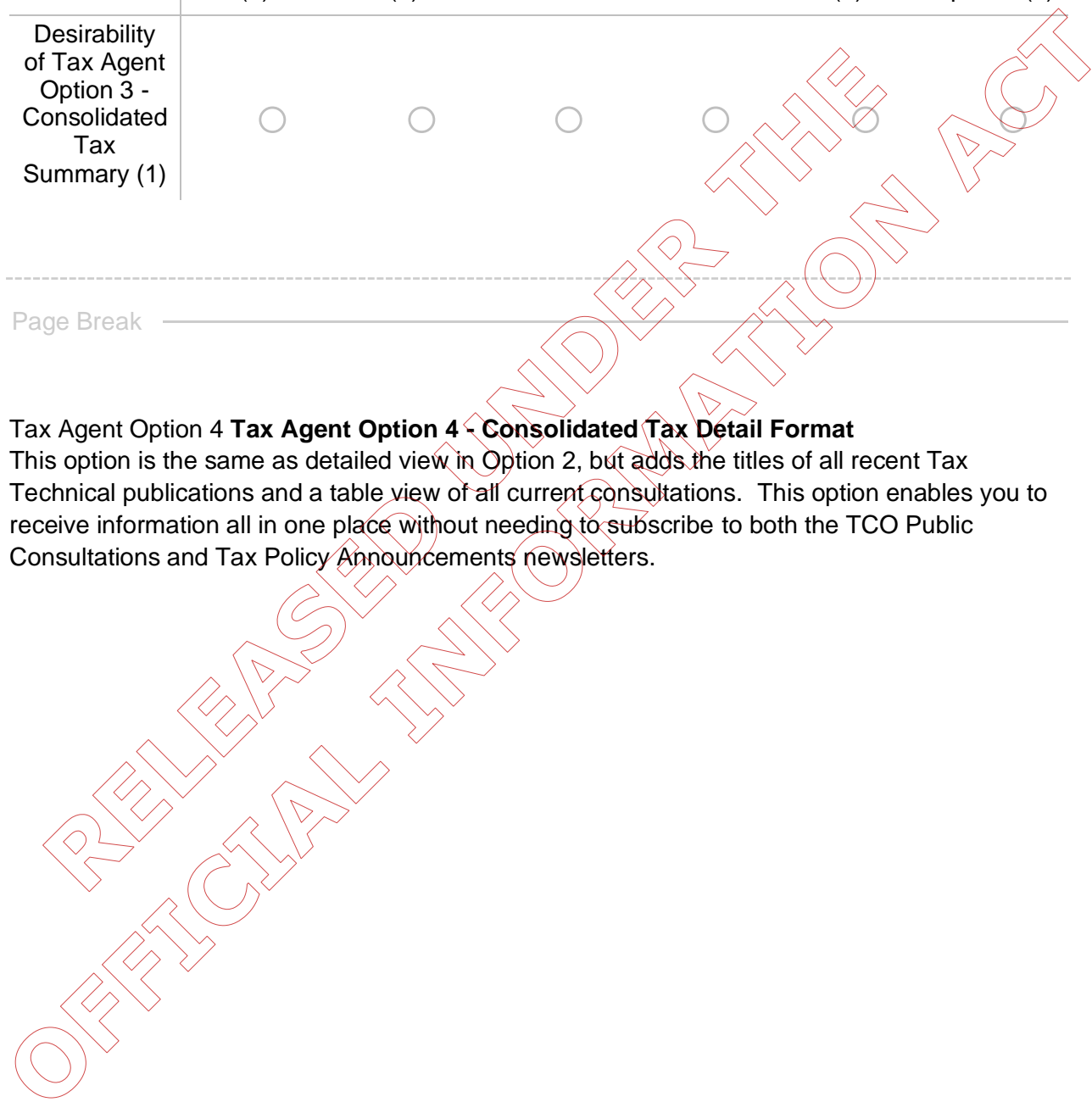
Q8 If this publication was an option available from Inland Revenue, how desirable would it be to you?

	Not at all desirable (1)	Not very desirable (2)	Neutral (3)	Desirable (4)	Very Desirable (5)	Don't know / No opinion (6)
Desirability of Tax Agent Option 3 - Consolidated Tax Summary (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Page Break

**Tax Agent Option 4 Tax Agent Option 4 - Consolidated Tax Detail Format**

This option is the same as detailed view in Option 2, but adds the titles of all recent Tax Technical publications and a table view of all current consultations. This option enables you to receive information all in one place without needing to subscribe to both the TCO Public Consultations and Tax Policy Announcements newsletters.



Click on the image below to expand, and close when you have finished reviewing.

The screenshot shows a website interface with a header and several news articles. The articles are titled: 'Tax update: High income tax', 'Unsettled updates', 'Australia: Labor shows extension from the Finance Investment Fund (FIF) case', 'Refund of GST credit account', 'APRA plans to RFP collect', 'Responsible care: Foster and employer', 'Calculations and rules on net assets', 'Income tax return credit transfer requests', 'Support for Toronto flood', 'Letter issued: Investment information available online', and 'Finance: Insurance scheme consultation'. There are also callouts for 'For the decision, click on the link below', 'The number of people who have subscribed to', 'Please click to witness', 'Full text of updates, click on the link below', 'Click on the link below to see the full text of the decision', and 'Click on the link below to see the full text of the decision'. At the bottom, there is a 'Current issues' section with a table of links to various documents and a 'Tax Technical Publications' section with a list of documents.

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Q9 If this publication was an option available from Inland Revenue, how desirable would it be to you?

	Not at all desirable (1)	Not very desirable (2)	Neutral (3)	Desirable (4)	Very Desirable (5)	Don't know / No opinion (6)
Desirability of Tax Agent Option 4 - Consolidated Tax Detail (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Page Break

Q10 Of the four proposed Tax Agent publication formats, which option appeals to you most?

- Option 1 – the Tax Agent summary format (presented using topic titles linking to the IR website for detailed information) (1)
- Option 2 – the Tax Agent detail format (presented with detailed information included) (2)
- Option 3 – the Consolidated Tax summary format (includes Tax Technical publications presented using topic titles linking to the IR website for detailed information) (3)
- Option 4 – the Consolidated Tax detail format (includes Tax Technical publications presented with detailed information included) (4)
- None of these options (6)

Page Break

Q11 Please tell us why do you prefer [\\${Q10/ChoiceGroup/SelectedChoices}](#)?

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Page Break

*Display This Question:*

*If Q10 Tax Agent - Which format appeals most? = Option 3 – the Consolidated Tax summary format (includes Tax Technical publications presented using topic titles linking to the IR website for detailed information)*

*Or Q10 Tax Agent - Which format appeals most? = Option 4 – the Consolidated Tax detail format (includes Tax Technical publications presented with detailed information included)*

Q12 If we provided you with a consolidated tax agent and tax technical publication, would you still want to receive the Tax Council Office Public Consultations (Tax Technical) newsletter separately?

	Yes (1)	No (2)	Don't know / no opinion (3)
Still Receive TCO Public Consultations newsletter? (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

*Display This Question:*

*If Q10 Tax Agent - Which format appeals most? = Option 3 – the Consolidated Tax summary format (includes Tax Technical publications presented using topic titles linking to the IR website for detailed information)*

*Or Q10 Tax Agent - Which format appeals most? = Option 4 – the Consolidated Tax detail format (includes Tax Technical publications presented with detailed information included)*

Q13 If we provided you with a consolidated tax agent and tax technical publication, would you still want to receive the Policy Announcements (Tax Policy) updates email separately?

	Yes (1)	No (2)	Don't know / no opinion (3)
Still Receive Policy Announcements (Tax Policy) updates? (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Page Break

Q14 How important is it that the new Tax Agent Update publication includes a reminder for upcoming key dates, like the one used in our Agent Answers publication?

	Not at all important (1)	Not very important (2)	Neutral (3)	Important (4)	Very important (5)	Don't know / no opinion (6)
Tax Agent Updates must include a reminder for upcoming key dates (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q15 How important is it that articles in our Tax Agent publications be published in other channels? (e.g., on social media sites like Linked-In, Twitter, etc.)

	Not at all important (1)	Not very important (2)	Neutral (3)	Important (4)	Very important (5)	Don't know / no opinion (6)
Tax Agent publications published in other channels (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Page Break

Display This Question:

If Q15 Tax Agent - Publications importance in other channels = Important

Or Q15 Tax Agent - Publications importance in other channels = Very important

Q16 Where else would you like to see the Tax Agent updates published?

- Linked-In (1)
  - Facebook (2)
  - Twitter (3)
  - Just by email only (4)
  - Other (please specify below) (5)
- 

End of Block: TAX AGENT BLOCK

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Start of Block: TAX TECHNICAL BLOCK

Tax Technical Start The next few questions are about publications from our **Tax Council Office (TCO)**. This includes the fortnightly **TCO Public Consultations**, the email notifications sent when a **Tax Technical consultation** is released, and the monthly **Tax Information Bulletin (TIB)**. We will also ask about Tax Policy Announcements. Our publications will be available on a weekly, or fortnightly, or monthly basis, and include the ability to save as PDF.

We have three proposed Tax Technical formats and features for you to review.

*Click on the thumbnail image to enlarge the picture in a new browser tab, then close the tab when you have finished with it. Your survey progress is saved should you close the survey by mistake - just click on the survey invite to return.*

Click the **NEXT** button to proceed.

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Page Break

**Tax Technical Opt 1 Tax Technical Option 1 - Summary Format**

Tax technical information is presented in a summary format to aid skim reading. The tax technical and open consultation titles link to the Inland Revenue website where the full item can be read. Consultation items are listed amongst the tax technical items. This option contains all the latest publication and consultation items published within the period you select (being weekly, or fortnightly, or monthly).

*Click on the image below to expand in a new browser tab, and close the new tab when you*

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have finished reviewing.

Option 1  
Tax Technical  
Summary Format

Inland Revenue  
Te Tari Taiao

Ngā takawaenga me ētahi atu  
**Technical and Policy**

Your preferences

You are currently signed up to Monthly updates.  
[Click here](#) to change your subscription preferences.

**Tax Technical** [Hyperlink to website](#)

**BR Prd 22/07 Reach Media New Zealand Limited**

23 Mar 2022 | Rulings

The engagement of supervisors by Reach Media to provide certain supervisory services in metropolitan and rural areas in relation to the delivery of newspapers, circulars, leaflets, brochures, catalogues, advertising material, samples and other such items.

See also:  
[BR Prd 22/05: Reach Media New Zealand Limited \(distributors\)](#)  
[BR Prd 22/06: Reach Media New Zealand Limited \(drivers\)](#)

**BR Prd 22/05 Reach Media New Zealand Limited**

23 Mar 2022 | Rulings

The engagement of distributors by Reach Media to physically deliver unaddressed mail from drop-off locations to households and other premises throughout New Zealand.

See also:  
[BR Prd 22/06: Reach Media New Zealand Limited \(drivers\)](#)  
[BR Prd 22/07: Reach Media New Zealand Limited \(supervisors\)](#)

**PUB00420: Fringe benefit tax - charitable and other donee organisations and fringe benefit tax**

22 Mar 2022 | Consultation

This draft public ruling considers when benefits provided by charitable organisations to their employees may be excluded from being treated as fringe benefits. It is a Reissue of [BR Pub 17/06](#). The draft ruling is accompanied by a fact sheet and we welcome your feedback on both items.

**PUB00395: Claiming depreciation on buildings**

20 Mar 2022 | Consultation

This interpretation statement provides guidance to building owners on when they can claim depreciation on buildings. It considers whether a building is given to "building" for depreciation purposes and the distinction between residential and non-residential buildings.

**COV 22/15 Variation in relation to s RP 17B(4) of the Income Tax Act 2007 to extend time for tax pooling transfers**

18 Mar 2022 | Determinations

In order to use funds in a tax pooling account to satisfy a tax obligation for the 2021 income year, section RP 17B(4) of the Income Tax Act 2007 requires a transfer request to be made on or before either 75 or 76 days after the terminal tax date.

For the 2021 income year, the time within which a request must be made has been extended to 183 days after the terminal tax date using s 61 of the Tax Administration Act 1994.

**05 22/01 Available Subscribed Capital record-keeping requirements**

11 Mar 2022 | Operational statements

This Statement sets out the Commissioner's approach to applying the statutory record-keeping requirements that are necessary to substantiate distributions of Available Subscribed Capital (ASC). It is published in the Information Bulletin April 2022.

[Save as PDF](#)

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Read more on [taxtechnical.ird.govt.nz](https://taxtechnical.ird.govt.nz) Tax Technical

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You should always independently verify the source and target of before taking any action. If you receive a suspicious communication of this nature, do not respond to it or follow any links. Forward it to [phishing@ird.govt.nz](mailto:phishing@ird.govt.nz).  
Please do not reply to this email as this inbox is not monitored.

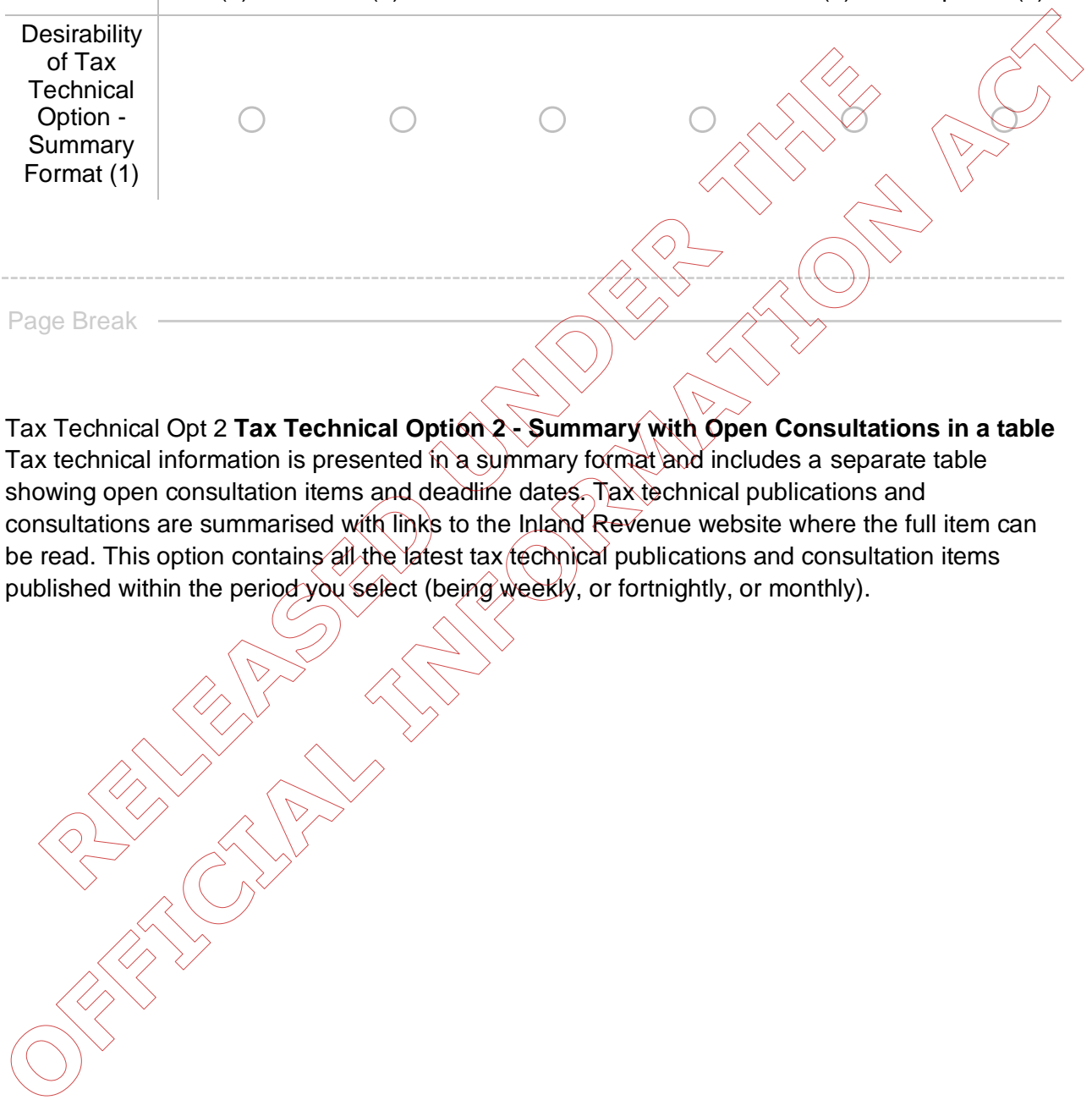
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Q18 If this publication was an option available from Inland Revenue, how desirable would it be to you?

	Not at all desirable (1)	Not very desirable (2)	Neutral (3)	Desirable (4)	Very Desirable (5)	Don't know / No opinion (6)
Desirability of Tax Technical Option - Summary Format (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Page Break

**Tax Technical Opt 2 Tax Technical Option 2 - Summary with Open Consultations in a table**  
 Tax technical information is presented in a summary format and includes a separate table showing open consultation items and deadline dates. Tax technical publications and consultations are summarised with links to the Inland Revenue website where the full item can be read. This option contains all the latest tax technical publications and consultation items published within the period you select (being weekly, or fortnightly, or monthly).



Click on the image below to expand, and close when you have finished reviewing.

Option 2  
Tax Technical Enhancement

Ngā takawaenga me ētahi atu  
**Technical and Policy**

Your preferences

No, you are currently signed up to **Heremū** updates. [Click here to change your subscription preferences.](#)

**Tax Technical** [Hyperlink to website](#)

**RR Prd 22/07 Reach Media New Zealand Limited**

23 Mar 2022 | Rulings

The engagement of supervisors by Reach Media to provide certain supervisory services in metropolitan and rural areas in relation to the delivery of newspapers, circulars, leaflets, brochures, catalogues, advertising material, samples and other such items.

See also:  
[RR Prd 22/05, Reach Media New Zealand Limited \(distributors\)](#)  
[RR Prd 22/05, Reach Media New Zealand Limited \(drivers\)](#)

**RR Prd 22/05 Reach Media New Zealand Limited**

23 Mar 2022 | Rulings

The engagement of distributors by Reach Media to physically deliver unaddressed mail from drop-off locations to households and other premises throughout New Zealand.

See also:  
[RR Prd 22/05, Reach Media New Zealand Limited \(drivers\)](#)  
[RR Prd 22/07, Reach Media New Zealand Limited \(supervisors\)](#)

**PUB00420: Fringe benefit tax - charitable and other donee organisations and fringe benefit tax**

23 Mar 2022 | Consultation

This draft public ruling considers when benefits provided by charitable organisations to their employees may be excluded from being treated as fringe benefits. It is a reissue of [RR Prd 17/06](#). The draft ruling is accompanied by a fact sheet and we welcome your feedback on both items.

**PUB00395: Claiming depreciation on buildings**

20 Mar 2022 | Consultation

This interpretation statement provides guidance to building owners on when they can claim depreciation on buildings. It considers the meaning to be given to "building" for depreciation purposes and the distinction between residential and non-residential buildings.

**COV 22/15 Variation in relation to s RP 17B(4) of the Income Tax Act 2007 to extend time for tax pooling transfers**

18 Mar 2022 | Determinations

In order to use funds in a tax pooling account to satisfy a taxpayer's obligation for the 2021 income year, section RP 17B(4) of the Income Tax Act 2007 requires a transferor to be made on or before either 75 or 76 days after the terminal tax date.

For the 2021 income year, the time within which a request must be made has been extended to 183 days after the terminal tax date using s 14 of the Tax Administration Act 1994.

**OS 22/01 Available Subscribed Capital record-keeping requirements**

11 Mar 2022 | Issuance statements

This Statement sets out the Commission's approach to applying the statutory record-keeping requirements that are necessary to substantiate distributions of Available Subscribed Capital (ASC).

To be published in Tax Information Bulletin April 2022

**Current consultations**

Consultation #	Title	Deadline
PUB00412	Income Tax - deductibility of costs incurred due to COVID-19	30 March 2022
PUB00412	Income Tax - Australian linked partnerships and foreign tax credits	14 April 2022
PUB00396	Charitable organisations: the financial arrangements rules	14 April 2022
PUB00395	Claiming depreciation on buildings	2 May 2022
PUB00420	Charitable and other donee organisations and fringe benefit tax	6 May 2022

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[Download as PDF](#)

[Read more on \[taxtechnical.net.nz\]\(#\)](#)

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**To Kaitiaki Take Kōwhiri**  
New Zealand Government

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**Review of tax related scams**

Inland Revenue will never send you an email requesting you to transfer money or disclose confidential details through an unsecured channel such as text.

Your financial details are held securely with the Inland Revenue Department. If you receive a suspicious communication of this nature, do not respond to it. Call us on any day, Monday to Friday, 0800 363 622.

Please do not reply to this email as this may not be monitored.

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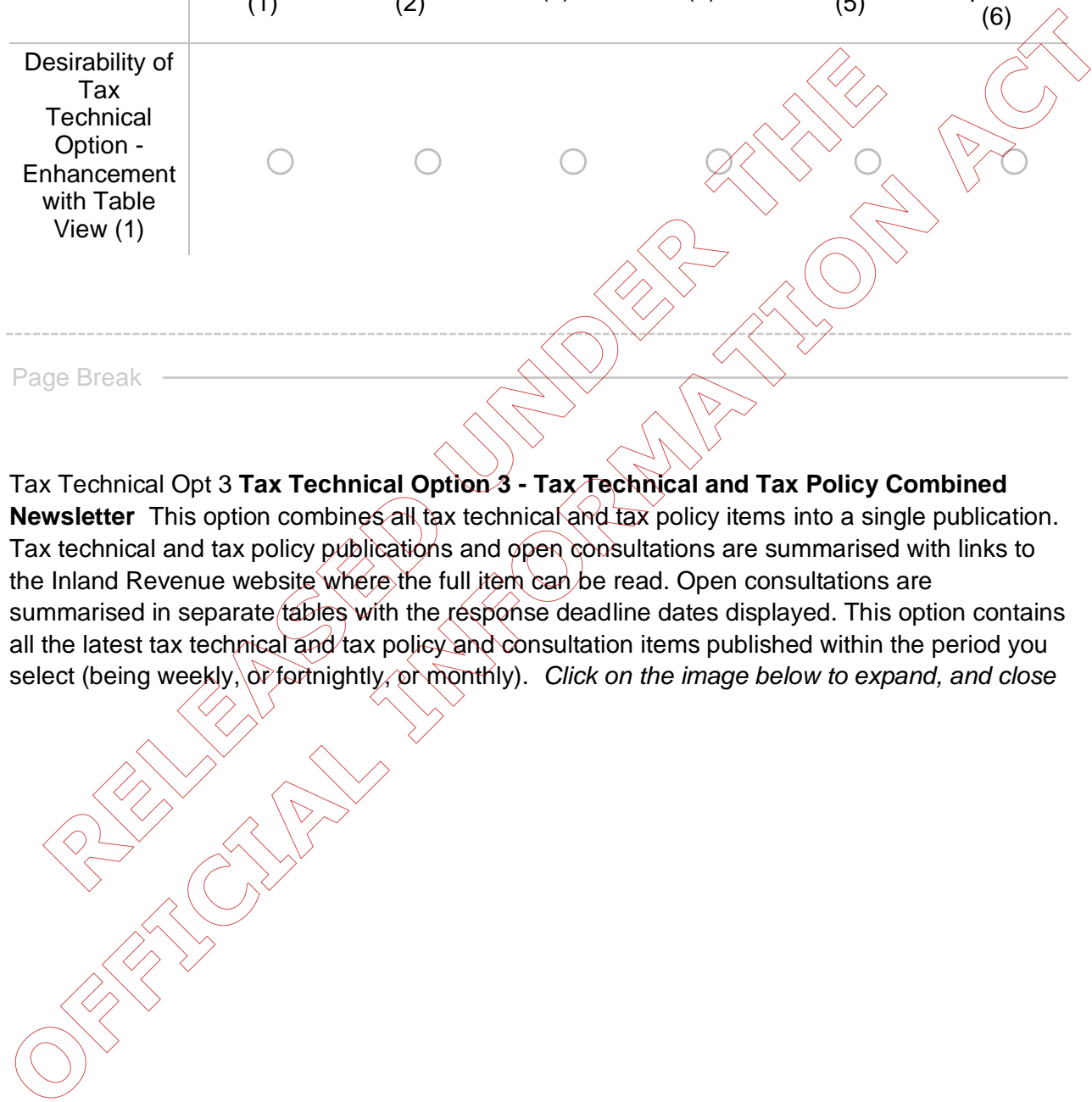
Q19 If this publication was an option available from Inland Revenue, how desirable would it be to you?

	Not at all desirable (1)	Not very desirable (2)	Neutral (3)	Desirable (4)	Very Desirable (5)	Don't know / No opinion (6)
Desirability of Tax Technical Option - Enhancement with Table View (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Page Break

**Tax Technical Opt 3 Tax Technical Option 3 - Tax Technical and Tax Policy Combined**

**Newsletter** This option combines all tax technical and tax policy items into a single publication. Tax technical and tax policy publications and open consultations are summarised with links to the Inland Revenue website where the full item can be read. Open consultations are summarised in separate tables with the response deadline dates displayed. This option contains all the latest tax technical and tax policy and consultation items published within the period you select (being weekly, or fortnightly, or monthly). *Click on the image below to expand, and close*





Q20 If we added Tax Policy Updates into the Tax Technical newsletter, how desirable would it be to you?

	Not at all desirable (1)	Not very desirable (2)	Neutral (3)	Desirable (4)	Very Desirable (5)	Don't know / No opinion (6)
Desirability of Tax Technical Option 3 - Tax Technical & Tax Policy Combined (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Page Break

Q21 Of the three proposed Tax Technical formats, which option appeals to you most?

- Tax Technical Option 1 – Summary format with tax technical and open consultation items together (1)
- Tax Technical Option 2 – Summary format with open consultations in a separate table (2)
- Tax Technical Option 3 – Combined tax technical and tax policy format (3)
- None of these options (4)

Page Break

Q22 Please tell us why do you prefer  $\{Q21/ChoiceGroup/SelectedChoices\}$ ?

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Page Break

*Display This Question:*

*If Q21 Tax Technical - Format Option Preference = Tax Technical Option 3 – Combined tax technical and tax policy format*

Q23 If we provided a combined Tax Technical and Tax Policy update, would you still prefer to receive the Tax Policy announcements email separately?

	Yes (1)	No (2)	Don't know / no opinion (3)
Still Receive Tax Policy announcements email? (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q25 If we released our consultations on the same day the Tax Technical newsletter is sent, would you still prefer to receive the consultations email notification separately?

	Yes (1)	No (2)	Don't know / no opinion (3)
Still Receive Consultations email notification? (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

End of Block: TAX TECHNICAL BLOCK

Start of Block: TAX INFORMATION BULLETIN BLOCK

TIB Start **Tax Information Bulletin (TIB)** The Tax Information Bulletin is a publication that includes the full text of all publications published on the [Tax Technical Website](#) each calendar month, and some items from Tax Policy. It includes a content page and a summary of each

publication, followed by the full text of each publication.


Vol 34 No 1 February 2022

# TAX INFORMATION

## Bulletin

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  - The COVID-19 Resurgence Support Payments Scheme (August 2021) Order (No 7) 2021
- 6 Determinations
  - FDR 2021/04: A type of attributing interest in a foreign investment fund for which a person may not use the fair dividend rate method.
  - COV 21/06: Variation in relation to the definition of "finance lease" in s YA 1 of the Income Tax Act 2007
  - FX 21/01: Foreign exchange rates
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 Inland Revenue  
Te Tari Taake

ISSN 1177-620X (Online)

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Q27 My first preference to find the Tax Technical information I need is by...

- Using the Tax Information Bulletin email (1)
- Using the Search function in the Inland Revenue Website (2)
- Contacting Inland Revenue by phone (3)
- Contacting Inland Revenue by myIR (4)
- Other means (please specify below) (5)

\_\_\_\_\_

Page Break

Q28 The new Tax Technical Newsletter will include the Tax Information Bulletin (TIB) summary. It will be available on a weekly or fortnightly or monthly subscription basis. It will include links to the [Tax Technical website](#) with its powerful search engine and filtering, allowing publications to be quickly found, viewed, printed, and saved.

If we provided a combined Tax Technical Newsletter and Tax Information Bulletin publication, would you still prefer to receive the monthly Tax Information Bulletin separately?

	Yes (1)	No (2)	Don't know / no opinion (3)
Still Receive the TIB? (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Page Break

Display This Question:  
If Q28 Tax Information Bulletin - Still receive the TIB? = Yes

Q29 Can you please tell us your reasons for retaining the monthly Tax Information Bulletin separately?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

End of Block: TAX INFORMATION BULLETIN BLOCK

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Start of Block: SURVEY CLOSE BLOCK

Q30 And finally, thinking about the tax publications we send, is there anything else Inland Revenue can do to improve what we publish to the tax community?

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End of Block: SURVEY CLOSE BLOCK

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# Taxpayer Rulings - Agent Feedback

Welcome to the agent feedback survey for taxpayer rulings.

We're interested in the experience you've had with the Taxpayer ruling process. Your feedback will help us to continue improving this service.

Please enter our reference number(s) for your ruling application (this can be found in the cover email).

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## Q1. Pre-lodgement meeting

If you had a pre-lodgement meeting, how useful was it? Choose an option

- Not useful (1)
- Slightly useful (2)
- Useful (3)
- Very useful (4)
- Not applicable (5)

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## Q2 Optional comments:

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Page Break



Q3. Service

For the staff working on your ruling application, how satisfied were you with:

Q3 a) their competence

- Very satisfied (1)
  - Satisfied (2)
  - Somewhat satisfied (3)
  - Neutral (4)
  - Somewhat dissatisfied (5)
  - Dissatisfied (6)
  - Very dissatisfied (7)
  - Not applicable (99)
- 

Q3 b) their professionalism

- Very satisfied (1)
  - Satisfied (2)
  - Somewhat satisfied (3)
  - Neutral (4)
  - Somewhat dissatisfied (5)
  - Dissatisfied (6)
  - Very dissatisfied (7)
  - Not applicable (99)
-

Q4 Optional comments:

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Q5. Timeliness

How satisfied were you with the time taken to complete the ruling application, given the issues raised?

Choose an option

- Very satisfied (1)
- Satisfied (2)
- Somewhat satisfied (3)
- Neutral (4)
- Somewhat dissatisfied (5)
- Dissatisfied (6)
- Very dissatisfied (7)
- Not applicable (99)

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Q6 Optional comments:

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Q7. Value for money

How satisfied were you with the estimated fee for the ruling application, given the issues raised?

Choose an option

- Very satisfied (1)
- Satisfied (2)
- Somewhat satisfied (3)
- Neutral (4)
- Somewhat dissatisfied (5)
- Dissatisfied (6)
- Very dissatisfied (7)
- Not applicable (99)

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Q8 Optional comments:

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Q9. Decision quality

If the reasons for our decision(s) were communicated with you (eg, in a contrary view letter), how satisfied were you that the reasons were:

a) comprehensive

- Very satisfied (1)
- Satisfied (2)
- Somewhat dissatisfied (3)
- Neutral (4)
- Somewhat dissatisfied (5)
- Dissatisfied (6)
- Very dissatisfied (7)
- Not applicable (99)

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Q9 b) clearly explained

- Very satisfied (1)
- Satisfied (2)
- Somewhat satisfied (3)
- Neutral (4)
- Somewhat dissatisfied (5)
- Dissatisfied (6)
- Very dissatisfied (7)
- Not applicable (99)

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Q10 Optional comments:

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Q11. Overall satisfaction

Overall, how satisfied were you with the service provided?  
Choose an option

- Very satisfied (1)
- Satisfied (2)
- Somewhat satisfied (3)
- Neutral (4)
- Somewhat dissatisfied (5)
- Dissatisfied (6)
- Very dissatisfied (7)
- not applicable (99)

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Q12 Optional comments:

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# Tuned In

Q1 Did you get the action or information you called for?

- Yes (1)
- No (2)
- Too early to tell (3)

Q2 Which of these did your call **mainly** relate to?

- Working for Families (1)
  - Student loan (14)
  - Child support (15)
  - Paid parental leave (16)
  - KiwiSaver (17)
  - Income tax (18)
  - Provisional tax (19)
  - Goods and services tax (GST) (20)
  - PAYE and other employer deductions and returns (21)
  - Fringe benefit tax (FBT) (22)
  - Something else (please tell us) (23)
- 
- Don't know (24)

Q3 What was the reason for your call? Please select all applicable

- Seeking confirmation that something has been actioned/received/processed (1)
  - Seeking confirmation of when something will be available (2)
  - Seeking help to file a tax return (3)
  - Seeking help with other matters (4)
  - Querying an amount owed (5)
  - Disputing an amount owed (6)
  - Querying an entitlement (11)
  - Querying an assessment (12)
  - Resolving a mistake or problem (7)
  - To make a change to something (8)
  - To let Inland Revenue know of a change in circumstances (9)
  - Other: Tell us (10)
- 

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Q4 Thinking about this phone contact with Inland Revenue, how satisfied or dissatisfied are you overall with your experience?

- Very satisfied (1)
- Satisfied (2)
- Somewhat satisfied (3)
- Neutral (4)
- Somewhat dissatisfied (5)
- Dissatisfied (6)
- Very dissatisfied (7)
- 

Q5 How easy or difficult did you find dealing with Inland Revenue during this phone call?

- Very easy (1)
- Easy (2)
- Somewhat easy (3)
- Neutral (4)
- Somewhat difficult (5)
- Difficult (6)
- Very difficult (7)

Q6 Thinking about the conversation you had with  $\{Agent\_name\}$ , how much do you agree or disagree with the following?

	Strongly agree (1)	Agree (2)	Somewhat agree (3)	Neutral (4)	Somewhat disagree (5)	Disagree (6)	Strongly disagree (7)
You were treated with respect (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
$\{Agent\_name\}$ understood your situation (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
$\{Agent\_name\}$ gave you additional helpful information or assistance (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall $\{Agent\_name\}$ made you feel confident and supported (4)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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Q7 Thinking about the conversation you had with  $\{Agent\_name\}$ , how much do you agree or disagree with the following?

$\{Agent\_name\}$  helped you to understand the next steps, if there were any

- Strongly agree (1)
- Agree (2)
- Somewhat agree (3)
- Neutral (4)
- Somewhat disagree (5)
- Disagree (6)
- Strongly disagree (7)
- There were no next steps (9)

Q8 Please share more feedback about  $\{Agent\_name\}$ . What did  $\{Agent\_name\}$  do particularly well and/or what could they do to improve?

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**IVR language preferences survey**

**March**

**2023**

1  
Have you called Inland Revenue within the last 12 months?

Yes  
no

The following are messages you may hear when you ring Inland Revenue  
Please add the word/s you would most expect to hear in the gap provided.

2  
Welcome, how may we \_\_\_\_\_ you?

3  
If you have a general \_\_\_\_\_ a visit to our website or calling our self-service line  
may be

4  
Please continue to \_\_\_\_\_ while we check your account.

5  
Please stay on the line for the next available \_\_\_\_\_.

6  
There will be a delay in answering your call, the current \_\_\_\_\_ is 5 minutes.

7  
You may hang up now, \_\_\_\_\_ you can continue to hold.

When Inland Revenue uses these words, how clear is the meaning to you?

Very unclear, Moderately unclear, Neutral, Moderately clear, Very clear

8 Unwaged

9 Submit

10 Arrears

11 Obligations

12 Call back service

We would like to get your preferences on some statements we might ask when you call us. Please select which option you would prefer:

13

"What tax type or service are you calling about"

"Please tell us what you are calling about"

"What can we help you with today?"

"What tax type or service are you calling about"

14

"Please say or key in your personal IRD number"

"Please provide your personal IRD number"

"Please say or enter your personal IRD number"

"Please say or type your personal IRD number"

15

"If you have an outstanding bill, your refund may be used to pay this first"

"If you have arrears, your refund may be used to pay this first"

"If you have a debt, your refund may be used to pay this first"

"If you have tax to pay, your refund may be used to pay this first"

16

"If you are unable to pay in full you can submit a proposal to repay by instalment."

"If you are unable to pay in full you can send a proposal to repay by instalment."

"If you are unable to pay in full you can provide a proposal to repay by instalment."

"If you are unable to pay in full you can propose a plan to repay by instalment."

16

"To help with your enquiry, we need to verify who you are"

"To help with your question we need to verify who you are"

"To help with your enquiry, we need to confirm who you are"

"To help with your question, we need to confirm who you are"

17

"Please remain on the line for the next available person. Current hold time is..."

"Please remain on the line for the next available person. Current wait time is..."

"Please stay on the phone for the next available person. Current hold time is..."

"Please stay on the phone for the next available person. Current wait time is..."

18

"To help us improve this service, please tell us what you are calling about"

"Please give us more information about what you are calling about"

"Please tell us again what you are calling about"

"Please tell us more about your reason for calling"

Please listen to the following audio message. Audio A

What are your thoughts about this welcome message?

19

We would like to get your views on some alternative information requests.  
Please listen to the following:

Option A

Option B

Which do you prefer

20

Please listen to the following:

Option A

Option B

Which do you prefer?

21

Please listen to the following:

Option A

Option B

Which do you prefer?

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**Account visibility survey**

**January**

**2023**

1

Typically, how often do you use myIR?

Every week

Monthly

Once or twice a year

Hardly ever/never

2 The myIR home page shows the different account types a customer can have. Based on what you can see in the image below, please select all the accounts that are closed:

3 How do you feel about closed accounts being shown on a myIR home page?

I want to be able to see the closed accounts

I don't mind seeing the closed accounts

I have concerns about seeing closed accounts

I don't want to see the closed accounts

Other

Please tell us more about how you feel about the display of closed accounts.

4 Have you ever clicked into a closed account?

Yes

No

5 What were you looking for?

6 Would you still like to have access to closed accounts?

Yes

No

7 Why would you like to be able to have access?

8 If you weren't able to find closed accounts in myIR what would you do?

Send a web message to Inland Revenue

Phone Inland Revenue

Talk to my tax agent

Talk to someone else

Nothing

**Tax cohort feedback survey**

**February 2023**

- 1 Does being part of the Cohort add value to your business and/or Tax Agent network?
- 2 What is the main benefit you get from being a member of the Cohort?
- 3 How satisfied were you with the topics covered by the Cohort?
- 4 What sort of topics do you prefer?
- 5 How satisfied were you with the speakers/guests?
- 6 What sort of speakers/guests do you prefer or would like to see at future meetings?
- 7 How satisfied were you with the information supplied to support the topics?
- 8 What other information would you like supplied and in what format?
- 9 How satisfied were you that your voice or perspective was heard?
- 10 How satisfied were you with the action taken by IR with the issues raised by the Cohort?
- 11 What could the Cohort do to be more effective as a group?
- 12 Would you like to see any other changes or adjustments to the cohort?

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**IITA survey**

**December 2022**

- 1 Do you know what your current tax code is?  
Yes  
No
- 2 How confident are you that you're using the correct tax code?  
Very confident  
Not confident
- 3 Have you ever changed your tax code?  
Yes  
No
- 4 Why did you change your tax code?
- 5 How did you know what tax code to pick?
- 6 Who do you think is responsible for making sure you're using the correct tax code?
- 7 Why do you think you may end up paying too much or too little tax during the year?
- 8 Would you like to know if you have paid too much or too little tax during the year?  
Yes  
No
- 9 Who would you expect to let you know if you are paying too much or too little tax?
- 10 If Inland Revenue was going to tell you about any under or over payment, how would you like to be notified?
- 11 When you have a change to your income, how likely are you to think about the effect on your tax deductions/
- 12 What would you do?
- 13 When you have a change to your income, do you understand how it affects the amount of tax you will need to pay for the year?

## IVR Voice preferences survey

November 2022

1 How often do you ring a call centre?

Never

Sometimes

Often

Always

2 Please listen to the following audio clip: Voice A - Aria

After you have listened to the audio, please indicate how much you agree or disagree that this voice had the following qualities

Strongly disagree    Disagree    Neutral    Agree    Strongly agree

Knowledgeable

Warm

Helpful

Empathetic

Sincere

Trustworthy

Authentic

3 Do you think this voice would be suitable for the Inland Revenue (IRD) call centre?

Yes

No

4 Why don't you think it is suitable?

5 Please listen to the following audio clip: Voice B - John

After you have listened to the audio, please indicate how much you agree or disagree that this voice had the following qualities

Strongly disagree    Disagree    Neutral    Agree    Strongly agree

Knowledgeable

Warm

Helpful

Empathetic

Sincere

Trustworthy

Authentic

6 Do you think this voice would be suitable for the Inland Revenue (IRD) call centre?

Yes

No

7 Why don't you think it is suitable?

8 Please listen to the following audio clip: Voice C - Molly

After you have listened to the audio, please indicate how much you agree or disagree that this voice had the following qualities

Strongly disagree    Disagree    Neutral    Agree    Strongly agree

Knowledgeable

Warm

Helpful

Empathetic

Sincere

Trustworthy

Authentic

9 Do you think this voice would be suitable for the Inland Revenue (IRD) call centre?

Yes

No

10 Why don't you think it is suitable?

11 Please listen to the following audio clip: Voice D – Arthur

After you have listened to the audio, please indicate how much you agree or disagree that this voice had the following qualities

Strongly disagree    Disagree    Neutral    Agree    Strongly agree

Knowledgeable

Warm

Helpful

Empathetic

Sincere

Trustworthy

Authentic

12 Do you think this voice would be suitable for the Inland Revenue (IRD) call centre?

Yes

No

13 Why don't you think it is suitable?

14 How important do you think the following qualities are in a call centre voice?

Not at all important    Low importance    Neutral    Important    Very Important

Speaking formally

Speaking slowly

Sounding natural

Being concise

Sounding personable

Simple language

15 Please choose what speed you prefer from a call centre voice:

Slow

Slightly slow

Normal

Slightly fast

Fast

16 Which of the following would you expect to hear in an opening message from a call centre voice?

Welcome message

The current wait time

Applicable self-service options

Options for being called back

Asking what the call is about

Other

17 What order would you expect to hear these options in from first (1) to last (6)?

Welcome message

The current wait time

Applicable self-service options

Options for being called back

Asking what the call is about

Other

18 What would you like to happen while on hold?

Listen to music

Updates on your wait time

Updates on your position in queue

Information on self-service options

Information about how to be called back

Other

19 When on hold, how often would you like to receive the following updates:

Very frequently      Frequently      Occasionally      Rarely      Never

Expected wait time

Position in queue

Information on how to be called back

Information about self-service options

20 Following a call to a call centre, would you like the opportunity to provide feedback about your experience?

Yes

No

21 How would you like to provide feedback?

By reply email

By reply text after the call

By voice at the end of the call

Other

22 Would you like to have repeated back what we understood you to say before progressing? For example, by hearing which call queue you have been placed in, to reassure that you are headed to the right place for your query.

Yes

No

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