

**EP DL POA – 1<sup>st</sup> Letter – Commissioner**  
**Draft - 4/27/06**

Dear IRS Employee Plan Determination Letter Request Customer:

I need your help with an important initiative we are undertaking to improve our service to America's taxpayers.

In a few days, you will receive a survey asking your opinions about the service you received in a recent IRS Employee Plan Determination Letter Request that you handled for your client. If you are not the person who had the most contact with the IRS on this matter, please direct the survey to the person who did.

This brief survey should take less than ten minutes to complete. Your answers will be combined with others to give us an evaluation of customer satisfaction with IRS service.

An independent research company will administer the survey and will keep your individual responses confidential. No identifying information will be associated with your responses. Your responses will be compiled with those of other recent customers and reported only in the aggregate to the IRS.

We are committed to improving service to every customer. Please help me in this effort by completing and returning the survey as soon as possible.

Sincerely,

Steven T. Miller  
Commissioner  
Tax Exempt and Government Entities Division

L1\_EPD POA

**EP DL POA – 2nd Letter – Project Director**  
**Draft - 4/27/06**

Dear JOHN Q & MARY Q SAMPLE:

A few days ago you received a letter from IRS Commissioner Steven Miller asking for your help with an important research project. The Internal Revenue Service (IRS) is committed to improving its performance and service to the American public. As part of this process, we are administering a nationwide survey to gather reliable information from those who have had contact with IRS employees and services.

Your name was selected through a scientific random sampling process to receive this survey. We want to know your opinions regarding the service you received in a recent Employee Plan Determination Letter Request that you handled for your client. Your responses are critical to the accuracy of this evaluation of the IRS's service. If another person was primarily responsible for dealing with the IRS on this matter, please pass the survey on to them and encourage them to respond.

Your participation is voluntary. An independent research company will keep your responses confidential. Your responses will be grouped with others, so that no individual reply can be traced back to a person or case number. No identifying information will be associated with your responses.

This brief survey should take less than ten minutes to complete. Use the postage-paid reply envelope to return your completed survey. If you have any questions or concerns, please feel free to call us toll free at 1-866-377-8208.

Thank you in advance for your cooperation. Your honest opinions will help bring about improvements in service for all Employee Plans.

Sincerely,

Larry Luskin  
Project Director

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L2\_EPD POA

**EP DL POA – 3rd Letter – Project Director  
Draft - 4/27/06**

Dear JOHN Q & MARY Q SAMPLE:

Recently you received a survey requesting your views about the Internal Revenue Service (IRS). So far, we have not received your completed survey. If you have not already done so, please take a few minutes to fill in your responses. If another person was primarily responsible for dealing with the IRS on this matter, please pass the survey on to them and encourage them to respond.-

As described in our previous communication, we are administering a nationwide survey among people who have had contact with the IRS. We want to know your opinions regarding the service you received in a recent Employee Plan Determination Letter Request that you handled for your client. Your responses are critical to the accuracy of this evaluation of the IRS's service.

Your name was selected through a scientific random sampling process to receive this survey. Your participation is voluntary. An independent research company will keep your responses confidential. Your responses will be grouped with others, so that no individual reply can be traced back to a person or case number. No identifying information will be associated with your responses.

The survey takes less than ten minutes to complete. Use the postage-paid reply envelope to return your completed survey. If you have any questions or concerns, please feel free to call us at 1-866-377-8208.

The IRS is committed to improving its performance and service to the American public. A vital step in this process is to gather reliable information from those who have had contact with IRS employees and services. Your honest opinions will help bring about these changes.

Thank you in advance for your cooperation.

Sincerely,

Larry Luskin  
Project Director

L4\_EPD POA

Reminder Postcard:

## Do We Have Your Input Yet?

Recently, you received a survey asking your opinions about the service you received from the IRS in a recent contact. If you have already completed and returned the survey, please accept our sincere thanks. If not, please take a few minutes to complete and return it today. We want to be sure we have your opinions and suggestions for improving the IRS's service to the public.

If you did not receive the survey, or it has been misplaced, please call us at 1-866-377-8208.

Larry Luskin  
Project Director

# **Office of Management and Budget Clearance Package**

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Customer Satisfaction Surveys:

Exempt Organization and Employee Plan

Determination and Examination Customers

Internal Revenue Service  
Tax Exempt and Government Entities Division

May 24, 2006

## **Background**

IRS has replaced the traditional measures of accomplishment with a balanced measurement system, consisting of business results, customer satisfaction, and employee satisfaction, to assess how well it is achieving its mission and objectives. The IRS Tax Exempt and Government Entities division (TE/GE) has administered four ongoing monthly mail surveys since 2001. TE/GE collects feedback from four customer segments: Employee Plan (EP) Determination, Exempt Organization (EO) Determination, EP Examination, and EO Examination. EP and EO Determination customers are those that have submitted an application to TE/GE to be determined tax exempt. EP and EO Examination customers are Plans and Organizations that have been examined (audited) by TE/GE. TE/GE collects feedback from these four customer segments to identify what TE/GE can do to improve service, to track progress in improving customer satisfaction over time, and to identify improvement opportunities.

TE/GE recently redesigned their four mail questionnaires to more accurately reflect the process that the four customer segments experience and to obtain more actionable results. TE/GE's current statement of work covers six quarters of survey administration: April 2006 through September 2007. TE/GE will begin administering the four redesigned questionnaires beginning with April's closed cases on July 5, 2006, and will continue administering these questionnaires through September 2007 closed cases on December 12, 2007. This clearance package will cover the same period of administration.

## **Research Methodology**

TE/GE will contact customers multiple times to maximize response rates; given past experience with the ongoing mail surveys, IRS should achieve response rates near 50% for each of the four surveys. An independent research firm will administer the survey, analyze the data, and report on the results only in the aggregate.

The contractor will send the questionnaires to a census of all EP and EO Examination customers based on the extract of monthly closed cases received from the IRS. The EP and EO Examination extract is derived from the Audit Information Management System (AIMS) database of organizations whose employee benefit plan(s) and exempt organization status has been examined and their cases closed. Cases closed by the Appeals division, cases closed with either of two disposal codes (claims allowed in full and referrals to other Operating Divisions), and cases with international address are excluded from the sample. For EP and EO Determination customers, a monthly sample of 400 each is selected from the extract of monthly closed cases sent from the IRS. The contractor will stratify the sample by cases approved on merit and cases approved that required contact to produce survey estimates with at least 90%

confidence interval and 5% precision for each type on a semi-annual basis. The EP and EO Determination extract is derived from the Employee Plans/Exempt Organizations Determination System (EDS) database of employee plans and organizations who have submitted an application to be determined tax-exempt and their cases closed. For EO, cases that are closed with codes of no remittance and correction disposal, requests that are amendments or termination of exempt status, and international addresses are excluded from the sample. For EP, cases that are closed with codes of Form 5310A and correction disposal, requests for Notice of Merger and Notice of Qualified Separate Line of Business, and international address are excluded from the sample. Also, the contractor will not send a questionnaire to any customer that received one in the last six months.

The same mailing procedures currently in place will be used for the newly designed questionnaires. The fielding methods and structure mirror the Dillman approach (Dillman, "The Tailored Design Method", 1999). Customers will receive an advance letter from the Commissioner informing them of the survey, they will then receive a letter with the questionnaire followed by a reminder postcard. Lastly, non-respondents will receive an additional letter and questionnaire. Each survey mailing will contain a return postage paid envelope. The survey instrument contains rating questions, demographics, and space for an open-ended comment.

The IRS will assume responsibility for printing the survey with the assistance of Media and Publications, using the print contractor through GPO.

## **Evaluation**

The contractor will need to develop weighting factors and possibly weight the determination survey responses to be representative of the full EO and EP Determination population. The contractor will use basic and advanced statistical techniques including, but not limited to, significance testing and the prioritization of improvement priorities using contractor's established technique.

The contractor will, on a semi-annual basis, summarize the quantitative ratings and produce a national report showing customer satisfaction scores on all survey items and overall improvement priorities for each of the four surveys. The contractor will deliver site-level reports for EP and EO Examination annually. The contractor will include any relevant database variables in the analysis and will weight the survey responses to reflect accurately the entire customer base and will provide documentation of any weighting methodologies and formulas applied to IRS.

Concurrent with the delivery of the reports, the contractor will deliver to the designated IRS official anonymous data files as well as files containing open-ended comments each semi-annual period. Verbatim and data files will be

cleansed of any taxpayer and employee names before delivery to vendor. Data files will include full variable names. Complete record layouts will accompany these files. Files will be delivered in Microsoft Excel format and SPSS format and not be write-protected. Delivery will be by mailing a CD-ROM to Program Leader, Strategic Planning in TE/GE in Washington, DC. Documentation will be provided for all statistical techniques employed in producing the reports. During the first period of survey administration, the contractor will supply a report template for approval by TE/GE Planning. Reports will include:

- Survey counts and overall response rates.
- The overall level of customer satisfaction with services provided by TE/GE.
- The averages and frequencies for all ratings questions.
- Which areas of service, in priority order, TE/GE should focus their resources to improve overall satisfaction.
- Cross tabulations of variables with survey questions.
- Analysis of the relationship between survey responses.

### **Tallies and Other Information**

The following information is needed to satisfy OMB clearance requirements. It must be provided within 60 days after survey data collection operations are concluded:

1. **FINDINGS:** Provide a brief summary of significant (important) findings that were evidenced in the results.
2. **ACTIONS TAKEN OR LESSONS LEARNED:** Provide a brief summary of any actions taken or lessons learned as a result of the findings.
3. **TAXPAYER PARTICIPATION:**
  - a. **SURVEYS:**
    - i. Number of requests for taxpayer participation
    - ii. Number of questionnaires returned or interviews completed
4. **DATE THE DATA COLLECTION BEGAN**
5. **DATE THE DATA COLLECTION ENDED**
6. **COST:** Include printing, postage, travel, overtime payments, payments to vendors, and any other costs incurred as a direct result of the survey (do not include regular salaries of IRS employees).

### **Estimated Burden Hours**

The IRS plans to annually receive 2,400 EO Determination questionnaires, 2,200 EP Determination questionnaires, 850 EO Examination questionnaires, and 1,350 EP Examination questionnaires.

Only the burden of those customers completing the survey is calculated below since the amount of time required to refuse the survey is minimal.



(6800 participants X 8 minutes per completed survey) = 54,400 minutes = 906 hours)

**Statistical Contact**

For questions regarding the study or questionnaire design or the statistical methodology, contact:

Lawrence Luskin  
ORC Macro  
11785 Beltsville Drive, Suite 300  
Calverton, MD 20705  
(301) 572-0334



**OTHER INFORMATION**

30. How many paid employees work for the organization for which this examination was conducted?
- None  
 1-9  
 10-99  
 100-499  
 500-999  
 1,000 or more

31. What are the estimated total assets of the organization for which this examination was conducted?
- Less than \$1,000,000  
 \$1,000,000 to \$4,999,999  
 \$5,000,000 to \$9,999,999  
 \$10,000,000 or more

32. For this examination, were you

- An employee/officer of the organization [skip to Question 34]?  
 A designated third-party representative/power of attorney (POA)?

Very Inconsistent	1	2	3	4	5	6	7	Very Consistent	Don't Know/Not applicable
	▼	▼	▼	▼	▼	▼	▼	▼	▼

33. If you are a designated third-party representative/power of attorney, how consistent was the IRS in its handling of this examination compared with other examinations in which you have participated in the past year?
- 

34. Did you visit the IRS website (www.irs.gov/vo) for assistance or information during the examination process?

- Yes  
 No

**COMMENTS**

35. If you have any suggestions for how the IRS can improve its service, or any other comments, please provide them below

If you have any questions about this survey, you may call the Survey Processing Center at 1-866-377-8208

If you have been unable to resolve any specific problems with your tax matter through normal IRS channels, or now face a significant hardship due to the application of the tax law, you may contact the Taxpayer Advocate Service at 1-877-777-4778.

*Paperwork Reduction Act Notice*  
 The Paperwork Reduction Act requires that the IRS display OMB control number on all public information requests. The OMB Control Number for this study is 1545-4432. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to: Internal Revenue Service, Tax Products Coordinating Committee, SE:W-CAR:MP:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224

Thank you for completing the survey.

Please return this questionnaire by mail using the enclosed business return envelope.



OMB # 1545-1422

# IRS CUSTOMER SATISFACTION SURVEY EXEMPT ORGANIZATION EXAMINATION

You can help the IRS improve its service to the public by answering the questions below. This voluntary survey takes less than 8 minutes to complete. Your responses will be confidential and only aggregate information will be provided to the IRS.

Please mark your responses with an 'x' like this example . Do not mark outside of the response area like this example .

The following questions ask your opinion regarding your most recent IRS exempt organization examination. For each question, regardless of whether you agree or disagree with the final outcome, please mark the appropriate box on a scale (where 1 means "Very Dissatisfied" and 7 means "Very Satisfied") or next to the response that best applies to you.

Very Dissatisfied	1	2	3	4	5	6	7	Very Satisfied	Don't Know/Not applicable
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## OVERALL SATISFACTION

- Regardless of whether you agree or disagree with the final outcome, how would you rate your overall satisfaction with the way your case was handled by the IRS?
 

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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- Overall, how satisfied are you with the length of the examination process from first notice through final resolution?
 

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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- Overall, how satisfied are you with how well the IRS communicated with you throughout the examination process?
 

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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- Overall, how satisfied are you with the IRS agent assigned to your case?
 

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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- How did your opinion of the IRS change as a result of this examination?
 

<input type="checkbox"/> Better	<input type="checkbox"/> Stayed the same	<input type="checkbox"/> Worse
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## NOTIFICATION LETTER/CALL

- How satisfied are you with
- How well the notification letter communicated the examination process to you?
 

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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  - The explanation of what would be required of you during the initial meeting?
 

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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  - The time given you to prepare for the initial meeting?
 

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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  - The amount of time you had to spend preparing for the initial meeting?
 

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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  - Did the IRS agent contact you by telephone in addition to sending a notification letter?
 

<input type="checkbox"/> Yes	<input type="checkbox"/> No
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## INITIAL MEETING

For this section please respond based on your interaction with the IRS agent at the initial meeting.

- Overall, how satisfied are you with the initial meeting?
 

Very Dissatisfied	1	2	3	4	5	6	7	Very Satisfied	Don't Know/Not applicable
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- How satisfied are you with . . .
 

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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- The courtesy of the IRS agent?
 

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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- The knowledge of the IRS agent?
 

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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- The explanation of the examination process?
 

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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- How well the IRS agent listened to your concerns?
 

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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- The explanation of your taxpayer rights?
 

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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- How thoroughly the IRS agent answered your questions?
 

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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- The amount of information you were asked to provide during the initial meeting?
 

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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- The reasonableness of the IRS agent's requests during the initial meeting?
 

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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## SUBSEQUENT INTERACTION(S) WITH THE IRS

How satisfied are you with

- The consideration given to the information you provided previously (e.g., during the initial meeting)?
 

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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- The description of the additional information the IRS needed to complete the examination process?
 

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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- The explanation of why additional information was requested?
 

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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- The time given you to respond to additional IRS request(s)?
 

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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- The amount of time you had to spend responding to IRS request(s) for additional information?
 

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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- Communications about the status of your examination after you had provided the requested information?
 

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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- The timeliness of the IRS agent in responding to your inquiries?
 

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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- How many requests for additional information did you have following your initial meeting?
 

<input type="checkbox"/> None	<input type="checkbox"/> One	<input type="checkbox"/> Two	<input type="checkbox"/> Three or more
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## FINAL RESOLUTION

How satisfied are you with . . .

- The ease of understanding the examination letter/report you received?
 

Very Dissatisfied	1	2	3	4	5	6	7	Very Satisfied	Don't Know/Not applicable
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- The explanation of why adjustments were made?
 

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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**OTHER INFORMATION**

25. How many total people are employed by the organization for which this determination was sought?
- Sole Proprietor
- 1-9
- 10-99
- 100-499
- 500-999
- 1,000 or more

26. What are the estimated total assets of the plan for which this determination was sought?
- Less than \$100,000
- \$100,000 to \$499,999
- \$500,000 to \$999,999
- \$1,000,000 to \$4,999,999
- \$5,000,000 or more

27. For this determination, were you
- An employee/officer of the organization (skip to Question 29)?
- A designated third-party representative/power of attorney (POA)?

Very Inconvenient		Very Convenient		Don't know/Not applicable		
1	2	3	4	5	6	7
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

28. If you are a designated third-party representative/power of attorney, how consistent was the IRS in its handling of this application compared with other applications you have completed in the past year?
- 

29. Did you visit the IRS website (www.irs.gov/ep) for assistance or information during the determination process?

- Yes
- No

**COMMENTS**

30. If you have any suggestions for how the IRS can improve its service, or any other comments, please provide them below

If you have any questions about this survey, you may call the Survey Processing Center at 1-866-377-8208

If you have been unable to resolve any specific problems with your tax matter through normal IRS channels, or now face a significant hardship due to the application of the tax law, you may contact the Taxpayer Advocate Service at 1-877-777-4778

*Paperwork Reduction Act Notice*

The Paperwork Reduction Act requires that the IRS display OMB control number on all public information requests. The OMB Control Number for this study is 1545-1432. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to: Internal Revenue Service, Tax Products Coordinating Committee, SE:W/CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224.

**Thank you for completing the survey.**

**Please return this questionnaire by mail using the enclosed business return envelope.**



OMB # 1545-1432

# IRS CUSTOMER SATISFACTION SURVEY EMPLOYEE PLAN DETERMINATION LETTER REQUEST

You can help the IRS improve its service to the public by answering the questions below. This voluntary survey takes less than 8 minutes to complete. Your responses will be confidential and only aggregate information will be provided to the IRS.

Please mark your responses with an 'x' like this example . Do not mark outside of the response area like this example .

The following questions ask your opinion regarding your most recent IRS employee plans determination letter request. For each question, regardless of whether you agree or disagree with the final outcome, please mark the appropriate box on a scale (where 1 means "Very Dissatisfied" and 7 means "Very Satisfied") or next to the response that best applies to you.

Very Dissatisfied 1 2 3 4 5 6 7 Very Satisfied Don't know/Not applicable

## OVERALL SATISFACTION

- Regardless of whether you agree or disagree with the final outcome, how would you rate your overall satisfaction with the way your case was handled by the IRS?  1  2  3  4  5  6  7  Don't know/Not applicable
- Overall, how satisfied are you with the length of the process, from submission of your application through final determination?  1  2  3  4  5  6  7  Don't know/Not applicable
- Overall, how satisfied are you with how well the IRS communicated with you throughout the process (whether in writing or by telephone)?  1  2  3  4  5  6  7  Don't know/Not applicable

## APPLICATION

- How satisfied are you with . . .
- The ease of locating the correct application form and instructions?  1  2  3  4  5  6  7  Don't know/Not applicable
  - The ease of understanding the application form and instructions?  1  2  3  4  5  6  7  Don't know/Not applicable
  - The ease of completing the application form?  1  2  3  4  5  6  7  Don't know/Not applicable
  - The amount of time you had to spend completing your application?  1  2  3  4  5  6  7  Don't know/Not applicable

## ACKNOWLEDGEMENT LETTER (CONFIRMING RECEIPT OF APPLICATION)

- How satisfied are you with . . .
- How quickly you received your acknowledgement letter?  1  2  3  4  5  6  7  Don't know/Not applicable
  - How clearly the acknowledgement letter communicated the expected timeframe until the IRS would contact you?  1  2  3  4  5  6  7  Don't know/Not applicable

- Did the IRS contact you within the timeframe stated in the acknowledgement letter?
  - Yes, I received a letter or telephone call within the stated timeframe.
  - No, I did not receive a letter or telephone call within the stated timeframe.
  - I initiated contact before the stated timeframe elapsed.

- How satisfied are you with the amount of time it took for the IRS to contact you (following your acknowledgement letter)?  1  2  3  4  5  6  7  Don't know/Not applicable

## ADDITIONAL INFORMATION REQUEST (AFTER RECEIPT OF ACKNOWLEDGEMENT LETTER)

Please complete this section if the IRS contacted you in writing or by telephone regarding your determination application or to ask for more information.

- Overall, how satisfied are you with the IRS agent assigned to your case?  1  2  3  4  5  6  7  Don't know/Not applicable
- How satisfied are you with . . .
  - The courtesy of the IRS agent?  1  2  3  4  5  6  7  Don't know/Not applicable
  - The knowledge of the IRS agent?  1  2  3  4  5  6  7  Don't know/Not applicable
  - How well the IRS agent listened to your concerns?  1  2  3  4  5  6  7  Don't know/Not applicable
  - How thoroughly the IRS agent answered your questions?  1  2  3  4  5  6  7  Don't know/Not applicable
  - Communications about the status of your determination?  1  2  3  4  5  6  7  Don't know/Not applicable
  - The consideration given to the information you presented in the original application or submission?  1  2  3  4  5  6  7  Don't know/Not applicable
  - The description of the additional information the IRS needed to complete your determination?  1  2  3  4  5  6  7  Don't know/Not applicable
  - The explanation of why additional information was requested?  1  2  3  4  5  6  7  Don't know/Not applicable
  - The time given you to respond to additional IRS request(s)?  1  2  3  4  5  6  7  Don't know/Not applicable
  - The amount of time you had to spend responding to IRS requests for additional information?  1  2  3  4  5  6  7  Don't know/Not applicable
  - The timeliness of the IRS agent in responding to your inquiries?  1  2  3  4  5  6  7  Don't know/Not applicable

## FINAL DETERMINATION

- How satisfied are you with . . .
- The ease of understanding the determination letter you received?  1  2  3  4  5  6  7  Don't know/Not applicable