

ACS Small Business and Self-Employed
December 2006

(For IRS administrator) Thank you for calling the ACS SBSE Survey.

Please enter your five-digit site code.

A. Please enter the resolution of this case from your perspective.

- For completely resolved, press 1
- For partially resolved, press 2
- For not resolved, press 3
- If you don't know, press 4

B. Please enter the issue that the taxpayer called about.

- For Levy, press 1
- For Lien, press 2
- For a Balance Due issue other than Levy/Lien, press 3
- For Taxpayer Assistance (i.e. forms, mailing info, etc), press 4
- For Payment Verification, press 5
- For a Notice such as a TDI delinquency, press 6
- For Other, press 13
- If you don't know, press 14

Thank you. Please transfer caller now

(For Respondent)

Press the star key when you are ready to take the survey (to repeat in Spanish also)

- C. To take the survey in English, press 1
- To take the survey in Spanish, press 2

Quality of Service Section

Caller hears: Thank you for participating in this voluntary survey. This survey allows taxpayers to provide anonymous and confidential information to assist the IRS in improving its services. It will take less than 10 minutes to complete. During this survey you will be asked to rate the service you received from the IRS during this call.

Please rate the following questions using the following scale:

- If you were very satisfied, press 5
- For somewhat satisfied, press 4
- For neither satisfied nor dissatisfied, press 3
- For somewhat dissatisfied, press 2
- For very dissatisfied, press 1
- If you are not sure, press 9

Press the star key to repeat the question.

You may press the pound key to go back to the previous questions and change your answer if necessary.

Question 1 Did this call relate to a notice, bill, or letter you received recently from the IRS?

If yes, press 1
For no, press 2 (**Skip to Q4**)
If you are not sure, press 9

- Question 2 Please rate your level of satisfaction with the clarity of the notice, bill, or letter.
- Question 3 Please rate your level of satisfaction with the tone of the notice, bill, or letter.
- Caller hears** The following questions have to do with the IRS's automated answering system. The response scale is the same. You may enter your response as soon as you know your answer.
- Question 4 Rate your satisfaction with the ease of understanding the automated answering system menu and instructions.
- Question 5 Rate your satisfaction with the time it took to get through to the IRS using the automated answering system.
- Question 6 Rate your satisfaction with how well the automated answering system directed you to the correct person.
- Question 7 Rate your satisfaction with the length of time it took to complete your call from when you first reached a representative.
Responses 1,2 go to Q8
Responses 3,4,5, 9 go to Q9
- Question 8 If you think the contact was too short, press 1. If you think it took longer than necessary, press 2.
- Caller hears** The following questions have to do with the IRS representative with whom you spoke. If you spoke to more than one representative, please consider the one with whom you spent the most time on the phone.
- Question 9 Rate your satisfaction with the friendliness of the representative who handled your call.
- Question 10 Rate your satisfaction with the representative's willingness to help you with your issue.
- Question 11 Rate your satisfaction with the fairness with which you were treated.
- Question 12 Rate your satisfaction with the knowledge of the representative.
- Question 13 Rate your satisfaction with authority of the representative to make decisions regarding your issue.
- Question 14 Rate your satisfaction with getting all the information you needed during the call.
- Question 15 Rate your satisfaction with the representative's description of what was expected of you.
- Question 16 Rate your satisfaction with the representative's description of what will happen if you do not take those actions.
- Question 17 Rate your satisfaction with the flexibility of the representative in handling your issue.

- Question 18 Were you requested to follow-up on this issue at a later date?
 Yes (1) Go to Q19
 No (2) Go to Q20
- Question 19 Rate your satisfaction with the amount of time you were given today to follow-up with the IRS on this issue.
- Question 20 Everything considered, whether you agree or disagree with the final outcome, rate your **overall satisfaction** with the service you received during this call.
- Caller hears** There are just a few more questions left. Please listen carefully to the new response choices.
- Question 21 At the completion of your phone call, did you feel your issues were resolved?
 If you feel they were completely resolved, press 1
 For partly resolved, press 2
 For not resolved, press 3
 If you are not sure, press 9
- Question 22 Not counting this survey, how many people at the IRS did you speak to during this call?
 Press 1 through 4 for the number of people you spoke with
 If you spoke with 5 or more, press 5
 If you are not sure, press 9
- Question 23 How many minutes did you spend on this call including any time on hold, but not including the time spent answering this survey?
 If less than 10 minutes, press 1
 10 to 20 minutes, press 2
 21 to 30 minutes, press 3
 31 minutes or longer, press 4

Comment [Js1]: Completion point

Demographic Questions

- Question 24 If you called today as an individual taxpayer, press 1.....skip to Q28
 A business taxpayer, press 2.....go to Q25
 An exempt organization, press 3.....skip to TEXT BEFORE Q31
 Or a tax practitioner, press 4.....skip to Q26
- Question 25 For businesses with assets less than 5 million dollars, press 1
 Otherwise, press 2.....skip to TEXT BEFORE Q31
- Question 26 As a tax practitioner, if you are representing an individual who filed a short form, press 1...skip to TEXT BEFORE Q31
 An individual who filed a long form with no small business, farm, or supplemental income, press 2...skip to TEXT BEFORE Q31
 An individual who filed a long form with small business, farm, or supplemental income, press 3...skip to TEXT BEFORE Q31
 A business taxpayer, press 4
 Or an exempt organization, press 5...skip to TEXT BEFORE Q31
- Question 27 If you are representing a business with assets less than 5 million dollars, press 1
 Otherwise, press 2.....skip to TEXT BEFORE Q31
- Question 28 If you filed short form 1040EZ, press 1... ..skip to TEXT BEFORE Q31
 If you filed short form 1040A (did not itemize deductions), press 2.....skip to TEXT BEFORE Q31

If you filed long form 1040 without other forms or schedules, press 3.....skip to
TEXT BEFORE Q31

If you filed long form 1040 with other forms or schedules, press 4

If you don't remember which form you filed, press 5.....skip to TEXT BEFORE
Q31

Question 29 If you reported income or losses from a farm or business you own, press 1
From rental property, press 2
From royalties, press 3
From a partnership or S Corporation, press 4
From an estate or trust, press 5
If you don't remember, press 6

Question 30 If you filed a Form 2106 for employee business expenses, press 1
Otherwise, press 2

End Section

Caller hears That completes the survey; however, we are required by law to report to you the OMB
Control Number for this public information request. That number is 1545-1432 In
addition, if you have any comments about the time used to complete this survey or ways
to improve the survey, you may write to the IRS.

Question 31 Would you like the address to mail your comments?
If yes, press 1
If no, press 2

If yes, the caller hears:
Mail your comments to:

Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW,
Washington, DC 20224.

Question 31a To repeat this address, press 1.
Otherwise, press 2.

Question 32 If you have tried unsuccessfully to resolve a problem with the IRS or if you have a
complaint, you may contact the Taxpayer Advocate's office by calling a toll-free
telephone number. If you would like the telephone number of the Taxpayer Advocate,
press 1. Otherwise, press 2.

If 1, the caller hears:
The toll-free Taxpayer Advocate phone number is 1-877-777-4778.

Question 32a To repeat this telephone number, press 1.
Otherwise, press 2.

Thank you for participating in this survey. Your information will help improve the
services provided by the IRS. Thank you. Goodbye.

Survey End



DEPARTMENT OF THE TREASURY
INTERNAL REVENUE SERVICE
WASHINGTON, D.C. 20224

SMALL BUSINESS / SELF-EMPLOYED DIVISION
3405399999999111122 P

September 22, 2004

13257B 0000001 *****SNGLP

JOHN Q & MARY Q SAMPLE

SAMPLE ADDRESS 1

SAMPLE ADDRESS 2

SAMPLE ADDRESS 3

SAMPLE ADDRESS 4

SAMPLE ADDRESS 5

ANYTOWN, US 12345-6789



Dear JOHN Q & MARY Q SAMPLE:

I need your help with an important initiative I am undertaking to improve our service to America's taxpayers. I want to get feedback from taxpayers like you who have gone through an IRS audit of a recent tax return.

In a few days, you will receive a questionnaire asking your opinions about the audit with the IRS. Please direct it to the person who had the most contact with the IRS on this matter. The questionnaire should take less than 5 minutes to complete. Your answers will be combined with others to give us an evaluation on customer satisfaction with IRS service.

To keep all replies confidential, we have asked an independent research company to administer the survey. The survey processing center employees will process the questionnaires and report only statistical totals to us.

I am committed to improving IRS service to every taxpayer. Please help me in this effort by completing and returning the questionnaire as soon as possible. If you do not receive a questionnaire, please contact our Survey Processing Center at 1-866-377-8208.

Sincerely yours,

K. Steven Burgess
Director, Examination Division

Survey Processing Center

PO Box 344
Claysburg, PA 16625 USA

September 13, 2004

13257B 0000001 *****SNGLP
JOHN Q & MARY Q SAMPLE
SAMPLE ADDRESS 1
SAMPLE ADDRESS 2
SAMPLE ADDRESS 3
SAMPLE ADDRESS 4
SAMPLE ADDRESS 5
ANYTOWN, US 12345-6789



Dear JOHN Q & MARY Q SAMPLE:

A few days ago you received a letter from K. Steven Burgess, Director, Examination Division, asking for your help with an important research project.

We are administering a nationwide survey among people who have had contact with the Internal Revenue Service (IRS). We want to know your opinions about the IRS Audit process. Your responses are critical to the accuracy of this research.

We are sending questionnaires to a random sample of taxpayers who have gone through an examination of a recent tax return. All responses are confidential, and your participation is voluntary. We will group your responses with others, so that no individual reply can be traced back to any one person.

The questionnaire is quite brief and should take less than five minutes to complete. Please use the postage-paid reply envelope to return your completed questionnaire. If you have any questions or concerns, please feel free to call The Survey Processing Center Helpline at 1-866-377-8208.

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

Sincerely,

A handwritten signature in cursive script that reads "Peter Webb".

Dr. Peter Webb
Project Director

Survey Processing Center

PO Box 344
Claysburg, PA 16625 USA



September 17, 2004

13257B 0000001 *****SNGLP
JOHN Q & MARY Q SAMPLE
SAMPLE ADDRESS 1
SAMPLE ADDRESS 2
SAMPLE ADDRESS 3
SAMPLE ADDRESS 4
SAMPLE ADDRESS 5
ANYTOWN, US 12345-6789



Dear JOHN Q & MARY Q SAMPLE:

A few days ago you received a survey from K. Steven Burgess, Director, Examination Division, asking for your help with an important research project. If you have already completed the survey, thank you. If you have not already done so, please take a few minutes to fill in your responses.

We are administering a nationwide survey among people who have had contact with the Internal Revenue Service (IRS). We want to know your opinions about the IRS Audit process. Your responses are critical to the accuracy of this research.

We are sending questionnaires to a random sample of taxpayers who have gone through an examination of a recent tax return, and your participation is voluntary. We will group your responses with others, so that no individual reply can be traced back to any one person.

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

Thank you in advance for your cooperation.

Sincerely,

Dr. Peter Webb
Project Director

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