

Questions for Non TETR Filers

1. Hello, I'm _____. I'm calling from the Treasury Inspector General for Tax Administration; a federal agency that has oversight of the Internal Revenue Service. We are currently conducting an independent review of the Internal Revenue Service's ability to effectively notify taxpayers of important tax law changes. Do you have a few minutes to speak with me?
2. This is not a review of your tax return, but serves as an aid to our organization to determine whether the IRS is choosing the most efficient methods to inform taxpayers. This information will be compiled and your identity will not be disclosed.

The time required for this phone call will vary depending on your responses; however, it should not take longer than five minutes. Your response is voluntary and will remain completely confidential. There are no penalties for not replying. We are prohibited by law from providing information concerning your tax account to third parties without your permission. We are contacting you, in part because you may not have received the full tax benefit or refund that you were entitled to.

3. We selected a sample of tax returns filed this year that did not claim the Telephone Excise Tax Refund. Your return was part of that sample. Would you mind explaining why you did not claim the refund?

At this point, the answers could vary widely and include: "I didn't think I qualified", "I don't know what it is", "I thought I claimed it", "I don't qualify", or "I let my preparer worry about those things". Depending on their response, the following should be determined:

- o Whether they were aware of the refund and if so how did they become aware it. (i.e., Tax Form (did you see it on the front page), Friend, Outreach programs, News, Newspapers, magazine, etc.
- o Whether they qualify for the refund.

The following information may be important during the discussion:
In general, anyone who paid the telephone tax on their long-distance or bundled service during the refund period (after Feb. 28, 2003, and before Aug. 1, 2006) is eligible to request the refund on their 2006 federal income tax return. This includes individuals, businesses and nonprofit or tax exempt organizations.

Taxpayers can base their refund requests on the actual amount of tax paid. To do this, they must fill out [Form 8913](#), Credit for Federal Telephone

Excise Tax Paid. This form is then attached to their regular 2006 income-tax returns.

But many people don't want to dig through up to 41 months of old phone bills or lack the records they need to figure the actual amount of tax paid. For that reason, the government created a method that businesses could use to estimate the amount they qualify for.

4. *Are you aware you can still claim the Telephone Excise Tax Refund by filing an amended return?*
5. *Will you amend your return to receive this credit?*