

Appendix A: Offer in Compromise Taxpayer and Practitioner Satisfaction Survey



Internal Revenue Service Small Business/Self-Employed Customer Satisfaction Survey on Offer in Compromise (OIC)

OMB #1545-1452

The IRS is trying to improve its service to the public. You can help in this important mission by answering this voluntary survey about the OIC program. The responses you provide will help us understand your opinion regarding how the IRS handled your recent application for an offer. This voluntary survey takes less than three minutes to complete and your responses will be kept completely confidential.

Instructions

Use a blue or black ink pen only.
Do not make any stray marks on this form.
All responses must be fully marked by filling in the circles.

Shade circles like this: ● Not like this: ○ / ⊗ ⊙ ⊕

Please indicate how satisfied you were with the following aspects of the OIC program.
The response choices are numbered from 1 to 5, where 1 means "Very Dissatisfied" and 5 means "Very Satisfied."
Please provide your opinion on the process, regardless of whether you agreed or disagreed with the final outcome of the offer.

	Very Dissatisfied		Very Satisfied			Not Applicable
	1	2	3	4	5	
1. Clarity of the instructions in IRS Form 656 ("Offer in Compromise"),	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Timeliness of IRS acknowledgement of my offer application,	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Clarity of explanations from the assigned offer examiner on the offer process,	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Courtesy shown to me by the assigned offer examiner,	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Knowledge of the assigned offer examiner on the offer process,	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. IRS updates to me about the status of my offer,	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. Clarity of letters from the IRS about my offer,	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8. Opportunity to discuss the analysis and proposed disposition of my offer with the assigned offer examiner,	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9. Opportunity for me to provide additional information based on discussions with the assigned offer examiner,	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10. Timeliness of IRS acknowledgement of my submission of additional documents requested from me,	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
11. Flexibility of the IRS in resolving disagreements with me about my offer,	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
12. Timeliness of IRS notification on the closure of my case,	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
13. Reasonableness of the amount of time I spent on the offer process,	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
14. Regardless of whether you agreed or disagreed with the final outcome, how would you rate your overall satisfaction with the way your OIC was handled?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

15. Use this space for additional comments or suggestions on improvements for the OIC program. If your response to any of statements 1-14 was "dissatisfied" or "very dissatisfied," please provide additional information to help us improve the future processing of offer in compromise cases.

The Privacy Protection Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this survey is 1545-1452. We extend the time required to fill out this questionnaire with a maximum of 3 months. Also, if you have any comments regarding this form address associated with this survey or suggestions on making this process simpler please write to the Internal Revenue Service, Tax Products Coordination Committee, SE W-CAR, MP 7-T-89, 1110 Constitution Ave., NW, Washington, DC 20224.

1 4 1 0 2

Thank you for completing the survey!

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For your convenience, the text of the questions and responses choices on the data collection instrument are shown below.

For questions 1-14, the responses choices are as follows:

- 1 = Very Dissatisfied
- 2 = Dissatisfied,
- 3 = Neither Satisfied nor Dissatisfied,
- 4 – Satisfied, and
- 5 = Very Satisfied.

Note: The previously assigned OMB number (1545-1432) is displayed in the upper right hand corner of the data collection instrument as required.

Survey Questions

1. Clarity of the instructions in IRS Form 656 (“Offer in Compromise”)
 2. Timeliness of IRS acknowledgement of my offer application.
 3. Clarity of explanations from the assigned offer examiner on the offer process.
 4. Courtesy shown to me by the assigned offer examiner.
 5. Knowledge of the assigned offer examiner on the offer process.
 6. IRS updates to me about the status of my offer.
 7. Clarity of letters from the IRS about my offer.
 8. Opportunity to discuss the analysis and proposed disposition of my offer with the assigned offer examiner.
 9. Opportunity for me to provide additional information based on discussions with the assigned offer examiner.
 10. Timeliness of IRS acknowledgement of my submission of additional documents requested.
 11. Flexibility of the IRS in resolving disagreements with me about my offer.
 12. Timeliness of IRS notifications on the closure of my case.
 13. Reasonableness of the amount of time I spent on the offer process.
 14. Regardless of whether you agreed or disagreed with the final outcome, how would you rate your overall satisfaction with the way your OIC was handled?
15. Use this space for additional comments or suggestion on improvements for the OIC program. If your response to any of statements 1-14 was “dissatisfied” or “very dissatisfied,” please provide additional information to help us improve the future processing of offer in compromise cases. (Write-in response.)

Appendix B: Survey Pre-notification Letter



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

SMALL BUSINESS/SELF-EMPLOYED DIVISION

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MELANIE BRYSON

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Dear Taxpayer or Tax Professional:

September 26, 2008

We are very interested in your opinion about the Offer in Compromise (OIC) Program. Within the next few days, the Internal Revenue Service will send you a questionnaire about the OIC Program. The purpose of this questionnaire is to gather opinions from taxpayers and tax professionals on their experience with submitting an offer in compromise, and on what the IRS can do to enhance this program.

We encourage you to respond to this voluntary questionnaire, so that we can use your feedback to improve our service. Your feedback will be confidential. You were randomly selected to participate in this survey. The questionnaire should take about three minutes to complete. The information you provide will only be used for the purposes of evaluating and improving this program.

We appreciate your participation, and we thank you in advance for your assistance in giving us your assessment of the OIC Program. Your feedback will allow us to identify ways to improve this program.

Sincerely,

Handwritten signature of Gloria Orozco in black ink.

Gloria Orozco,
National Program Manager for Offer in Compromise,
Small Business/Self-Employed Operating Division

Letter 4366 (7-2008)
Catalog Number 20156J
1416C

For your convenience, the text of the pre-notification letter is shown below.

Survey Pre-notification Letter

We are very interested in your opinion about the Offer in Compromise (OIC) Program. Within the next few days, the Internal Revenue Service will send you a questionnaire about the OIC Program. The purpose of this questionnaire is to gather opinions from taxpayers and tax professionals on their experience with submitting an offer in compromise, and on what the IRS can do to enhance this program.

We encourage you to respond to this voluntary questionnaire, so that we can use your feedback to improve our service. Your feedback will remain private. You were randomly selected to participate in this survey. The questionnaire should take about three minutes to complete. The information you provide will only be used for the purposes of evaluating and improving this program.

We appreciate your participation, and we thank you in advance for your assistance in giving us your assessment of the OIC Program. Your feedback will allow us to identify ways to improve this program.

For your convenience, the text of the cover letter is shown below.

Survey Cover Letter

We are very interested in your opinion about the Offer in Compromise (OIC) Program. This questionnaire is directed to individuals and practitioners who have submitted and offer to the Internal Revenue Service. Please have this questionnaire completed by the person who was responsible for completing Form 656, *Offer in Compromise*.

You were randomly selected to participate in this survey. The enclosed questionnaire should take about three minutes to complete, and your participation is voluntary. The information you provide will only be used for the purposes of evaluating and improving this program.

We realize that you may have submitted more than one offer. If you have submitted more than one offer and have interacted on numerous occasions, **please base your responses on your overall experience.**

For your convenience, an envelope is enclosed. Please return the completed questionnaire within five business days to ensure that your opinions are included in this study. If the return envelope is missing or lost, please return the questionnaire to the above address.

We appreciate your participation, and we thank you in advance for your assistance in giving us your assessment of the OIC Program. Your personal feedback will allow us to identify ways to evaluate and improve this program.

Appendix D: Survey Follow-up Notice

Recently, the Internal Revenue Service sent you a questionnaire.

If you have already completed and returned the questionnaire, thank you for your participation. If you have not yet completed and returned the questionnaire, would you please take a few minutes to do so today? Your reply is important. We encourage you to respond so that we can use your feedback to evaluate and improve our service.

If you have misplaced the questionnaire or return envelope, you may call us at (954) 423-7273 to receive a replacement.

Your feedback is confidential and will allow the IRS to improve service for you.

Please Note: We can only assist with questionnaire replacement or general questions. No account assistance can be provided.

Form 13714 (Rev. 7-2008)
Catalog Number 43857B

Department of the Treasury
Internal Revenue Service

For your convenience, the text of the follow-up notice is shown below.

Survey Follow-up Notice

Recently, the Internal Revenue Service sent you a questionnaire.

If you have already completed and returned the questionnaire, thank you for your participation. If you have not yet completed and returned the questionnaire, would you please take a few minutes to do so today? Your reply is important. We encourage you to respond so that we can use your feedback to evaluate and improve our service.

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