


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 received a notice from the IRS pointing out a discrepancy between the earnings information reported on their tax return and the information provided to us by organizations such as banks and employers.

In a few days, you will receive a questionnaire asking your opinions about the process of resolving such discrepancies 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 of customer satisfaction with IRS service.

To keep all replies anonymous to the IRS, we have asked an independent research company to administer the survey. Pacific Consulting Group/Scantron 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 the Survey Helpline at 1-866-960-7897.

Sincerely,

A handwritten signature in black ink that reads "C. Sherwood". The signature is written in a cursive, flowing style.

C. Sherwood
Director, Campus Compliance Services

Pacific Consulting Group/Scantron

IRS Customer Survey
P.O. Box 64530
St. Paul, MN 55164-9610 USA

A few days ago, you received a letter from C. Sherwood, Director, Campus Compliance Services, 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 process of resolving a discrepancy between the earnings information reported on your tax return and information provided to the IRS by organizations such as banks and employers. Your responses are critical to the accuracy of this research.

We are sending questionnaires to a random sample of taxpayers who have had such discrepancies. All responses will be anonymous to the IRS, 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 5 minutes to complete. Please use the postage-paid reply envelope to return your completed questionnaire. If you have any questions about this survey, please feel free to call the Survey Helpline at 1-866-960-7897.

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

Pacific Consulting Group/Scantron

IRS Customer Survey

P.O. Box 64530

St. Paul, MN 55164-9610 USA

Do We Have Your Input Yet?

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

If you did not receive the questionnaire, or it got misplaced, please call us at 1-866-960-7897.

Dr. Peter Webb
Project Director

Pacific Consulting Group/Scantron

IRS Customer Survey
P.O. Box 64530
St. Paul, MN 55164-9610 USA

A few days ago, you received a survey from C. Sherwood, Director, Campus Compliance Services, 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 process of resolving a discrepancy between the earnings information reported on tax returns and information provided to the IRS by organizations such as banks and employers. Your responses are critical to the accuracy of this research.

We are sending questionnaires to a random sample of taxpayers who have had such discrepancies. All responses will be anonymous to the IRS, 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 5 minutes to complete. Please use the postage-paid reply envelope to return your completed questionnaire. If you have any questions about this survey, please feel free to call the Survey Helpline at 1-866-960-7897.

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,

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

Dr. Peter Webb
Project Director

IRS SMALL BUSINESS/SELF-EMPLOYED CUSTOMER SATISFACTION SURVEY AUTOMATED UNDERREPORTER (AUR)

The IRS is trying to improve its service to the public. You can help in this important mission by answering the questions below. This voluntary survey should take less than 5 minutes to complete. Your responses will be kept completely anonymous to the IRS. If you have any questions about this survey, you may call the Survey Helpline at 1-866-960-7897.

1 The questions that follow ask your opinion regarding the discrepancy that was highlighted on your tax return. For each question, *regardless of whether you agree or disagree with the final outcome*, please indicate your answer by checking the box that best represents your opinion.

How would you rate the ...	Very Dissatisfied	Somewhat Dissatisfied	Neither Satisfied Nor Dissatisfied	Somewhat Satisfied	Very Satisfied
	▼	▼	▼	▼	▼
a. Length of time it took to hear from the IRS that you had a discrepancy?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Ease of understanding the form notifying you of the discrepancy?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Ease of understanding the exact amount owed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. Accuracy of the discrepancy amount?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e. Completeness of information about the discrepancy?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f. Completeness of instructions for resolving the discrepancy?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g. Flexibility in resolving the discrepancy?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
h. Length of time the IRS took to respond to you?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
i. Ease of understanding the documents explaining action taken on your account?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
j. Length of time it took to resolve the discrepancy?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
k. Notification of case closure?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
l. Fairness of how you were treated by the IRS?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2 Did you call the phone number listed in the AUR discrepancy notice?
 Yes (Continue below)
 No (Skip to question 5)

How would you rate the ...	Very Dissatisfied	Somewhat Dissatisfied	Neither Satisfied Nor Dissatisfied	Somewhat Satisfied	Very Satisfied
	▼	▼	▼	▼	▼
a. Usefulness of the automated telephone system?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Length of time it took you to get through to an IRS employee?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Completeness of information you received during this call?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3 What is the primary reason that you called the phone number listed in the AUR discrepancy notice? (Mark one response only)

- To receive an explanation of the notice
- To receive general information (e.g., forms, status of case, etc.)
- To receive answers to my other questions concerning my case
- To give the IRS additional information
- To request an extension of time to respond
- Other

Please continue on back

4 Were you able to reach a representative when you called the phone number listed in the AUR discrepancy notice?

- Yes (Continue below)
- No (Skip to question 5)

How would you rate the ...?

	Very Dissatisfied	Somewhat Dissatisfied	Neither Satisfied Nor Dissatisfied	Somewhat Satisfied	Very Satisfied
a. Length of time to complete your call once you got through?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Courtesy of the IRS representative?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Knowledge of the IRS representative?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. Ability of the IRS representative to assist you in resolving your issue?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5 Regardless of whether you agree or disagree with the final outcome, how would you rate your overall satisfaction with the way your tax return discrepancy was handled?

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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6 Were you provided with documents explaining the actions taken on your account?
 Yes No

7 Did you expect to receive documents explaining the actions taken on your account?
 Yes No

8 Did you ...?
 Use a tax professional to assist you with resolving this discrepancy?
 Represent yourself in resolving this discrepancy
 Both

9 If you had questions regarding your discrepancy, what method of contacting the IRS would you prefer? Please rank the following methods in order of preference from 1st to 5th, with 1st being the highest preference and 5th being the lowest preference. (Mark only one preference for each contact method.)

	Highest Preference				Lowest Preference
	1st	2nd	3rd	4th	5th
Mail	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Phone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
In person	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fax	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E-mail ...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Occasionally, we conduct additional in-depth IRS-related research. Research participants may receive a small monetary incentive to participate depending on the research. If you are interested in participating in future research, please provide us with your telephone number and your e-mail address (if available). This information will not be shared with the IRS and will be used only for the purpose of survey research.

Telephone number: _____ E-mail address: _____

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

10 Use this space for comments or suggestions for improvement.

Paperwork Reduction Act Notice. The Paperwork Reduction Act requires that the IRS display an 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 the: 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 the questionnaire to P.O. Box 64530, St. Paul, MN 55164-9610 USA.