

# Macro International/ScanTron

IRS Customer Survey  
P.O. Box 64529  
St. Paul, MN 55164-9614

[DATE]

Name1  
Name2  
Name3  
Name4  
Address  
City, State, Zip

RE: FIRM NAME  
PLAN NAME  
PLAN NUMBER

Dear JOHN Q & MARY Q SAMPLE:

Recently you received a survey requesting your views about the IRS Employee Plan Determination Letter Request process. So far, we have not received your completed survey. If you have not already done so, please take a few minutes to provide your response. If another person was primarily responsible for dealing with the IRS on this matter, please pass this 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 interacted 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.

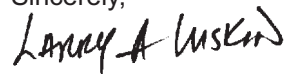
Your name was selected through a scientific random sampling process to receive this survey. Your participation is voluntary. An independent research company will keep your responses confidential. Your responses will be grouped with others, so that no individual reply can be traced back to a person or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

The survey takes less than 8 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 Macro International at 1-888-260-0052 or e-mail us at [EPDSurvey@mmail.macrointernational.com](mailto:EPDSurvey@mmail.macrointernational.com).

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 improvements.

Thank you in advance for your cooperation.

Sincerely,



Larry Luskin  
Project Director  
Macro International Inc.

L4\_12184-A\_POA

## Internal Revenue Service (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 held confidential by the survey processing center and only aggregate information will be provided to the IRS.

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

### Overall Satisfaction

		Very Dissatisfied				Very Satisfied		Don't Know Not Applicable	
		1	2	3	4	5	6	7	
		▼	▼	▼	▼	▼	▼	▼	▼
1.	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="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2.	Overall, how satisfied are you with the length of the process, from submission of your application through final determination?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3.	Overall, how satisfied are you with how well the IRS communicated with you throughout the process (whether in writing or by telephone)?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

### Application

		Very Dissatisfied				Very Satisfied		Don't Know Not Applicable	
		1	2	3	4	5	6	7	
		▼	▼	▼	▼	▼	▼	▼	▼
<b>How satisfied are you with...</b>									
4.	The ease of locating the correct application form and instructions?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5.	The ease of understanding the application form and instructions?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6.	The ease of completing the application form?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7.	The amount of time you had to spend completing your application?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

### Acknowledgement Letter (Confirming Receipt of Application)

		Very Dissatisfied				Very Satisfied		Don't Know Not Applicable	
		1	2	3	4	5	6	7	
		▼	▼	▼	▼	▼	▼	▼	▼
<b>How satisfied are you with...</b>									
8.	How quickly you received your acknowledgment letter?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9.	How clearly the acknowledgement letter communicated the expected timeframe until the IRS would contact you?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10.	Did the IRS contact you within the timeframe stated in the acknowledgement letter?								
	<input type="radio"/> Yes, I received a letter or telephone call within the stated timeframe.								
	<input type="radio"/> No, I did not receive a letter or telephone call within the stated timeframe.								
	<input type="radio"/> I initiated contact before the stated timeframe elapsed.								
11.	How satisfied are you with the amount of time it took for the IRS to contact you (following your acknowledgement letter)?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**PLEASE COMPLETE THIS SECTION IF THE IRS CONTACTED YOU IN WRITING OR BY TELEPHONE REGARDING YOUR DETERMINATION APPLICATION OR TO ASK FOR MORE INFORMATION.**

**Additional Information Request (After Receipt of Acknowledgement Letter)**

	Very Dissatisfied							Very Satisfied	Don't Know Not Applicable
	1 ▼	2 ▼	3 ▼	4 ▼	5 ▼	6 ▼	7 ▼		
12. Overall, how satisfied are you with the IRS agent assigned to your case?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>How satisfied are you with...</b>									
13. The courtesy of the IRS agent?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
14. The knowledge of the IRS agent?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
15. How well the IRS agent listened to your concerns?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
16. How thoroughly the IRS agent answered your questions?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
17. Communications about the status of your determination?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
18. The consideration given to the information you presented in the original application or submission?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
19. The description of the additional information the IRS needed to complete your determination?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
20. The explanation of why additional information was requested?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
21. The time given you to respond to additional IRS request(s)?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
22. The amount of time you had to spend responding to IRS requests for additional information?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
23. The timeliness of the IRS agent in responding to your inquiries?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Final Determination**

	Very Dissatisfied							Very Satisfied	Don't Know Not Applicable
	1 ▼	2 ▼	3 ▼	4 ▼	5 ▼	6 ▼	7 ▼		
<b>How satisfied are you with...</b>									
24. The ease of understanding the determination letter you received?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**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)?

**ANSWER ONLY IF YOU ARE A DESIGNATED THIRD-PARTY REPRESENTATIVE/POWER OF ATTORNEY (POA)**

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

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.

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If you have any questions about this survey, please contact the survey processing center at 1-888-260-0052 or EPDSurvey@mmail.macrointernational.com.



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.

**Thank you for completing the survey.**

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