

OMB SUPPORTING STATEMENT  
STUDY TO MEASURE CUSTOMER SATISFACTION  
IRS SB/SE FIELD EXAMINATION TAX CUSTOMERS  
October 2009

# Field Examination Customer Satisfaction Survey

**INTERNAL REVENUE SERVICE (IRS) CUSTOMER SATISFACTION SURVEY**  
**IRS SMALL BUSINESS/SELF EMPLOYED**  
**FIELD EXAMINATION**

The IRS is trying to improve its service to the public. You can help in this important mission by providing your feedback below. This voluntary survey should take less than 5 minutes to complete. Your identity will not be provided to the IRS. If you have any questions about this survey, please call the survey processing center at 1-888-260-0052.

The following questions ask your opinion regarding how the IRS handled your most recent audit. For each question, *regardless of whether you agree or disagree with the final outcome*, please mark the appropriate circle next to the response that best applies to you.

How satisfied are you with ...	Very	Somewhat	Neutral	Somewhat	Very	Don't Know/ Not Applicable
	Dissatisfied	Dissatisfied		Satisfied	Satisfied	
	1	2	3	4	5	
1. The initial information the IRS provided (e.g., letters/notices, phone calls, IRS publications) so that you knew what to expect during the audit?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. The explanation of how long the audit process would take from start to finish?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. The flexibility of the auditor in scheduling meetings/calls?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. The explanation the auditor provided as to the reason(s) for the audit?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. How well the IRS communicated with you throughout the audit process?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. The explanation of why more records were requested after the initial appointment?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. The time you were given to provide all information requested by the IRS?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8. The explanation your auditor gave you about why the audit expanded from the issues you were initially informed about?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9. The amount of time you personally had to spend on the audit?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10. The professionalism of your auditor?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
11. The auditor's understanding of your business?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
12. The tax knowledge of your auditor?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
13. The timeliness of the status updates the auditor provided during the audit?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
14. The usefulness of the status updates?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
15. The timeliness of the IRS auditor in responding to your inquiries?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
16. The explanation of why changes were made to your return?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
17. The length of the audit process from start to finish?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
18. Understanding that you have payment options?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
19. If a manager was involved with your audit, how satisfied were you with the way he or she affected your audit?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
20. Regardless of whether you agree or disagree with the final outcome, how would you rate your overall satisfaction with the way your audit was handled?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

21. Did you view the video series, "Your Guide to an IRS Audit," available at [www.irs.gov](http://www.irs.gov)?

Yes  No

22. If you saw the video series, did it help you prepare for your audit?

Yes  No  Not applicable

**Answer the following questions only if a change was proposed to your tax return.**

23. Based on your interactions with the IRS in an audit of your tax return, do you now know what to do to prevent similar tax problems in the future?

Yes  No

24. What additional information could IRS provide to help you prevent similar problems in the future?

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25. For this audit, were you...? (Check **one** only)

- Taxpayer  
 A tax professional who represented the taxpayer  
 Someone else who represented the taxpayer

26. Please provide any comments or suggestions for improvement.

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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 research purposes.

**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.

**Thank you for completing the survey.**

**Please return the questionnaire to P.O. Box 64529, St. Paul, MN 55164-9614.**

**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.



**Field Examination Survey  
Pre-Notification Letter**

[IRS Logo]

[IRS Department Letterhead]

[Date]

JOHN Q & MARY Q SAMPLE  
SAMPLE ADDRESS 1  
ANY TOWN, US 12345-6789

Dear JOHN Q & MARY Q SAMPLE:

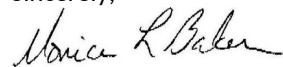
I need your help with an important initiative I am undertaking to improve our service to America's taxpayers.

In a few days, you will receive a survey asking your opinions about the service you received from the IRS in a recent audit of a tax return. If you are not the person who had the most contact with the IRS on this matter, please direct the survey to the person who did.

This brief survey should take less than 5 minutes to complete. Macro International, an independent research firm, will provide your responses anonymously to the IRS. Macro International will not provide any of your identifying information to the IRS and will provide your responses to the IRS in aggregate totals only.

The IRS is committed to improving service to every customer. Please help us in this effort by completing and returning the survey as soon as possible. If you do not receive a survey, please contact Macro International at 1-888-260-0052.

Sincerely,



Monica L. Baker  
Director, Examination Division

# **Field Examination Survey Cover Letter (1)**

# Macro International/ScanTron

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

[DATE]

JOHN Q & MARY Q SAMPLE  
SAMPLE ADDRESS 1  
ANYTOWN, US 12345-6789

Dear JOHN Q & MARY Q SAMPLE:

A few days ago you received a letter from Monica L. Baker, Director, Examination Division, asking for your help with an important research project. The IRS is committed to improving its performance and service to the American public. As part of this process, we are administering a nationwide survey to obtain feedback from a sample of individuals who had a recent audit of a tax return.

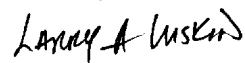
Your name was selected for this survey through a random sample of those who were audited. We want to know your opinions regarding the audit process and the service you received. Your responses are critical to the accuracy of our evaluation of the IRS's service. If another person was primarily responsible for dealing with the IRS on this matter, please direct the survey to that person and encourage him or her to respond.

Macro International will hold your identity anonymous and will not provide any of your identifying information to the IRS. Your answers will be grouped with others, so that no individual reply can be traced back to a person or case number.

This brief survey should take less than 5 minutes to complete. We have included a postage-paid reply envelope for you to return your completed survey. If you have any questions or concerns, please feel free to contact Macro International at 1-888-260-0052.

Thank you in advance for your cooperation.

Sincerely,



Larry A. Luskin  
Project Director  
Macro International Inc.



**Field Examination Survey  
Reminder Postcard**

## **Do We Have Your Input Yet?**

Recently, you received a survey asking your opinions about the service you received in a recent interaction with the IRS. If you have already completed and returned the survey, please accept our sincere thanks. If not, please take a few minutes to complete and return it today. We want to be sure we have your opinions and suggestions for improving the IRS's service to the public.

If you did not receive the survey, or it has been misplaced, please contact us at 1-888-260-0052.

Larry A. Luskin  
Project Director  
Macro International Inc.

**Macro International/ScanTron  
IRS Customer Survey  
P.O. Box 64529  
St. Paul, MN 55164-9614**

# **Field Examination Survey Cover Letter (2)**

# Macro International/ScanTron

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

[DATE]

JOHN Q & MARY Q SAMPLE  
SAMPLE ADDRESS 1  
ANYTOWN, US 12345-6789

Dear JOHN Q & MARY Q SAMPLE:

Recently you received a survey requesting your feedback about your experiences during a recent IRS audit. So far, we have not received your completed survey. If you have not already completed the survey, please take a few minutes to fill in your responses. If another person was primarily responsible for dealing with the IRS on this matter, please direct the survey to that person and encourage him or her to respond.

As described in our previous communication, we are administering a nationwide survey among people who had a recent IRS audit of a tax return. Your name was selected for this survey through a random sample of those who were audited. We want to know your opinions regarding the audit process and the service you received. Your responses are critical to the accuracy of our evaluation of the IRS's service.

Macro International will hold your identity anonymous and will not provide any of your identifying information to the IRS. Your answers will be grouped with others, so that no individual reply can be traced back to a person or case number.

The survey should take less than 5 minutes to complete. We have included a postage-paid reply envelope for you to return your completed survey. If you have any questions or concerns, please feel free to contact Macro International at 1-888-260-0052.

Thank you in advance for your cooperation. 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 changes.

Sincerely,



Larry A. Luskin  
Project Director  
Macro International Inc.