

**IRS Small Business/Self-Employed  
Customer Satisfaction Survey**

**\* \* \* Automated Underreporter \* \* \***

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 five minutes to complete. When completing this survey, please mark your responses with an 'x' using a blue or black pen like this example . Do not mark outside of the response area like this example . Your response will be kept completely confidential. If you have any questions about this survey, you may call The Survey Processing Center at 1-866-377-8208.

**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 opinion by choosing a number from 1 to 5, where 1 means "Very Dissatisfied" and 5 means "Very Satisfied."**

	Very Dissatisfied	1	2	3	4	Very Satisfied	5
<b>How would you rate the . . .</b>							
a. Length of time it took to hear from the IRS that you had a discrepancy?	1	2	3	4	5		
b. Ease of understanding the form notifying you of the discrepancy?	1	2	3	4	5		
c. Ease of understanding the exact amount owed?	1	2	3	4	5		
d. Accuracy of the discrepancy amount?	1	2	3	4	5		
e. Completeness of information about the discrepancy?	1	2	3	4	5		
f. Completeness of instructions for resolving the discrepancy?	1	2	3	4	5		
g. Flexibility in resolving the discrepancy?	1	2	3	4	5		
h. Length of time the IRS took to respond to you?	1	2	3	4	5		
i. Ease of understanding documents explaining action taken on your account?				1	2	3	4 5
j. Length of time it took to resolve the discrepancy?					1	2	3 4 5
k. Notification of case closure?	1	2	3	4	5		
l. Fairness of how you were treated by the IRS?	1	2	3	4	5		

**2. Did you call the phone number listed in the AUR notice?**

Yes (CONTINUE BELOW)

No (SKIP TO QUESTION 5)

**How would you rate the ...**

a. Usefulness of the automated telephone system?	1	2	3	4	5
b. Length of time it took you to get through to an IRS employee?	1	2	3	4	5
c. Completeness of information you received during this call?	1	2	3	4	5

**PLEASE CONTINUE ON NEXT PAGE**

**3. What is the primary reason that you called the phone number listed in the AUR 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

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

- Yes (CONTINUE BELOW)
- No (SKIP TO QUESTION 5)

**How would you rate the ...**

- a. Length of time it took to complete your call once you got through?      1 2 3 4 5
- b. Courtesy of the IRS representative?      1 2 3 4 5
- c. Knowledge of the IRS representative?      1 2 3 4 5
- d. Ability of the IRS representative to assist you in resolving your issue?      1 2 3 4 5

**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?**

- 1 2 3 4 5

**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. 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 1<sup>st</sup> to 5<sup>th</sup>, with 1<sup>st</sup> being the highest preference and 5<sup>th</sup> being the lowest preference.**

**(Mark only one under each preference.)**

	Highest Preference 1 <sup>st</sup>	2 <sup>nd</sup>	3 <sup>rd</sup>	4 <sup>th</sup>	Lowest Preference 5 <sup>th</sup>
Mail					
Phone					
In person					
Fax					
Email					

**9. Did you ...?**

- Use a tax professional to assist you with resolving this discrepancy
- Represent yourself in resolving this discrepancy
- Both

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, best time of day to call, and your email address (if available). This information will not be shared with the IRS and will be used only for the purpose of survey research.

Telephone #: \_\_\_\_\_ Best time to call: \_\_\_\_\_

Email 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.**

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*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 by mail using the enclosed business return envelope.**