

# **Office of Management and Budget Clearance Package**

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IRS Office of Governmental Liaison & Disclosure (GLD)

Customer Satisfaction Evaluation for:

Primary Agency Liaison

&

Users of IRS GLD Services and Products

2008

Internal Revenue Service  
Small Business/Self Employed (SB/SE)

**October 21, 2008**  
**Introduction**

**Background**

To emphasize the Communications, Liaison and Disclosure (CLD) mission statement above, CLD develops and delivers integrated strategic communications and educational products to SB/SE employees and taxpayers. CLD also partners with key stakeholders in tax administration including: federal, state and local governmental agencies, practitioners, and industry groups.

CLD is responsible for developing as well as executing strategies designed to enhance voluntary compliance and ensuring that federal tax information is protected by those agencies that receive federal tax data. CLD is also responsible for a wide range of programs and activities in support of both SB/SE and the IRS Strategic Plan. This includes the administration of IRS Disclosure Programs (IRC §6103), overseeing the Freedom of Information Act and Privacy Act and administration of the IRS Disaster Assistance Program.

CLD is comprised of six functions that provide critical support toward the accomplishment of SB/SE and IRS missions and objectives:

- Governmental Liaison and Disclosure
- Stakeholder Liaison Headquarters
- Stakeholder Liaison Field
- Communications
- Policy and Strategic Planning
- Safeguards

Stakeholder Liaison Headquarters (SL HQ) – focuses on national engagement of the payroll and practitioner community and stakeholder organizations to provide information about IRS policies, practices and procedures to ensure compliance with the tax laws, both by voluntary means and through enforcement programs. In addition, SL oversees IRS involvement in disaster assistance and emergency relief activities.

The key engagement vehicle for GLD and their customers is the use of the data exchange program (GLDEP). This is a program in which the IRS shares tax data from about 20 data bases, primarily with state agencies. Beginning in 2007, states reciprocated with the State Revenue File Matching Initiative, a program which may prove beneficial to IRS non-filer and underreporter operations.

GLD conducts an annual satisfaction survey of its customers. For several years, the purpose of the survey was to gauge the satisfaction of state taxing agencies (GLD's primary customer) with the data exchange program. In 2007 GLD asked Research to upgrade their annual survey. They wanted to better measure the effectiveness of their programs in order to make strategic adjustments to improve the service-wide GLD programs. Surveys distributed prior to 2007 indicated that customers are extremely satisfied with the exchange program (high satisfaction from nearly 100 percent of their customers). However, GLD was concerned that the data they received did not provide useful information. In addition, GLD wished to expand the scope of the survey to include the customers' opinions regarding the liaison and disclosure functions.

## **Objectives of Data Collection**

GLD wishes to measure customer satisfaction with its bulk data exchange program as well as its liaison and disclosure programs. The evaluations will be used to enhance future GLD products and to develop new strategies if needed. Furthermore, the evaluation will be used to identify key issues with their products and services.

## **Methodology**

### **Sample Design**

These evaluations will be administered in mid-September 2008. GLD intends to survey the total population of their state tax agency customers.

The Primary Agency Liaison 2008 Evaluation requests feedback about the participant's satisfaction with their IRS GLD primary contact and the program implementation, as well as on Safeguards/Security and the performance of the Secure Data Transfer (SDT).

The IRS GLD Services and Products 2008 Evaluation asks for feedback on Disclosure, Safeguards/ Security, Compliance, the GL Data Exchange Program, and SDT.

Both evaluations will be used to measure the quality of the products and services provided by the IRS GLD primary contact.

Primary agency liaison participants will be notified via e-mail of the two evaluations (see Attachment I). They will be asked to complete and return the first evaluation titled 'GLD Survey for Primary Agency Liaison 2008' evaluation (see Attachment II). They will also be notified that a second evaluation will be sent to them and will be asked to forward this email to anyone within their agency who used GLD products or services. The second

evaluation titled 'GLD Survey for Users of IRS GLD Services and Products 2008' (see Attachment III) will be sent with a separate cover letter (see Attachment IV).

## Data Collection Date

The 2008 customer satisfaction evaluation is sent out annually each fall. The customers are given 3 weeks to complete the evaluation. Seven days after the first evaluation is sent a follow-up/reminder email (see Attachment V) will be sent to those agencies who have not returned either evaluation. No evaluation will be collected after 21 days.

Potential dates contacts will be sent:

Primary Agency Liaison Evaluation	October 22, 2008
Users of IRS GLD Products and Services Evaluation	October 22, 2008
Follow-up / Reminder email	October 29, 2008
Closing of Evaluation process	November 5, 2008

## Data to be Collected

Attachment II, 'GLD Survey for Primary Agency Liaison 2008' and Attachment III 'GLD Survey for Users of IRS GLD Services and Products 2008' outlines the type of information that will be collected from participants.

Primarily, GLD seeks to obtain customer feedback on the overall quality of and satisfaction with the GLD services.

## How Data will be Used

GLD primary agency liaisons will be notified of the evaluations via e-mail.

The evaluations will be reviewed and their answers will be profiled by SB/SE Research in Philadelphia. Using descriptive statistics, the findings will be presented to GLD in table format. Findings will be reviewed and considered by GLD to determine if they are meeting their customer's needs, as well as to enhance the GLD program.

## How Data will be Analyzed

The analysis will consist of a profile of the GLD Customer Satisfaction evaluation results.

## **Who is Conducting the Research**

The IRS Office of Governmental Liaison and Disclosure (GLD) requests this research. The evaluations were developed by the SB/SE Research staff in Philadelphia, PA. The evaluations will be administered and analyzed by the same research site. The preliminary results will be provided to GLD within 31 days after the closing of the evaluation process.

## **Location and Facility**

GLD customers are located nationwide. The email accounts the customers used when registering for GLD services will be used to administer the evaluations. See Attachment VI for a copy of the GLD Agency Enrollment form.

## **Stipend**

A monetary stipend will not be offered to participants.

## **Recruitment Efforts**

All state tax agency customers will be asked to participate in the evaluation.

Based on interest in IRS GLD Products and Services, GLD expects that customers who have an ongoing relationship with their GLD contact and need for the GLD products will complete the evaluations.

## **Methods to Maximize Response Rate**

All GLD customers will be issued an evaluation notice via email. Seven days after the initial contact, customers will be sent a reminder email requesting that they take the evaluations if they have not done so already.

## **Expected Response Rate**

Given the prior evaluation response rate, GLD expects to have a response rate of 65% for the Primary Liaisons.

## **Test Structure/Design**

Prior to distributing the evaluations, Philadelphia Research and GLD will conduct a pilot test using at least 10 participants. The purpose is to ensure that all questions and statements are interpreted similarly by all participants. Once the responses from the pilot

participants are received, SBSE Research will confer with GLD to finalize the evaluation instrument.

## **Efforts to not Duplicate Research**

In 2007 Research administered a similar customer satisfaction evaluation for GLD. GLD asked Research to conduct a 2008 customer satisfaction evaluation that includes questions related to their Secure Data Transfer (SDT) program as well as the topics covered in the previous year's evaluation (Disclosure, Safeguards/ Security, Compliance, and the GL Data Exchange Program). This type of evaluation is unique to CLD – GLD. No other GLD evaluation has been or will be issued to GLD customers. The evaluation may be used in subsequent years with OMB approval.

## **Cost of Study**

The estimated cost to administer and analyze the evaluation results is \$57,881. This amount includes the salary of the Lead Analyst and any procured survey software.

## **Participant Criteria**

Participants for this evaluation must be customers with GLD and participate in one of the GLD programs.

## **Privacy/Disclosure/Anonymity/Security Issues**

SBSE Research will ensure compliance with the Taxpayer Bill of Rights II. All participants will be treated fairly and appropriately. The security of the data used in this project and the privacy of taxpayers/participants will be carefully safeguarded at all times. Anonymity will be safeguarded. Respondents to the survey will not be identified to Research or to GLD.

For the subject project,

- The use of taxpayer data will be restricted to authorized personnel for approved research projects;
- Taxpayer/participant privacy will be safeguarded;
- The data used in a research project will be validated;
- Any known or potential limitations in the data used in a research project will be properly disclosed;
- Any data used in a research project will be obtained, utilized, stored, disseminated, and transported in accordance with the Internal Revenue Manual;
- Related documentation (data dictionary, record layout, sampling plan, data validation documentation, syntax and other computer code) will be made available to any research site requesting data;

- All data used in a research project and under the control of Research, whether stored on computer or archived on magnetic media, will be destroyed in a timely manner in accordance with the Internal Revenue Manual.

This document covers all data used in any research activity from internal or external sources.

The Paperwork Reduction Act Statement & OMB Control Number will be provided on the evaluation.

## Burden Hours

GLD plans to issue these evaluations one time.

The Primary Liaison evaluation will take 10 minutes to complete. There is a potential evaluation population of 157 people. Given this population the total estimated public burden is 26 hours. However, with an expected response rate of 65% the public burden would be 17 hours.

For persons participating in the evaluation, the burden time is estimated at 10 minutes.

Participants will not experience travel time for this study. The following table details the total burden calculation.

<b>Total Estimated Burden Hours</b>			
<b>Primary Liaison</b>			
	Number of Persons	Time Estimate (Minutes)	Total Burden (Hours)
	(1)	(2)	$[(1)*(2)]/60$
Potential Survey Population	157	10	<b>26</b>
With an Estimated Response Rate of 65%			<b>17</b>

The Product and Services evaluation will take 10 minutes to complete. Based on the FY2007 survey there is a potential evaluation population of 96 people. Given this population the total estimated public burden is 16 hours. Using the Primary Liaison evaluation response rate of 65% the public burden would be 10.4 hours.

For persons participating in the evaluation, the burden time is estimated at 10 minutes.

Participants will not experience travel time for this study. The following table details the total burden calculation.

<b>Total Estimated Burden Hours</b>			
<b>Product and Services</b>			
	Number of Persons	Time Estimate (Minutes)	Total Burden (Hours)
	(1)	(2)	[(1)*(2)]/60
Potential Survey Population	96	10	<b>16</b>
With an Estimated Response Rate of 65%			<b>10.4</b>

## Study Contact

For questions regarding the Evaluation, contact:

**Reuben Robinson**

Chief SB/SE Research – Philadelphia  
600 Arch Street (RM 7204)  
Philadelphia, PA 19106  
(215) 861-1268

**Cait DeStefano**

Operations Research Analyst –Lead Analyst for the Evaluation  
SBSE Research - Philadelphia  
600 Arch Street (RM 7204)  
Philadelphia, PA 19106  
(215) 861-3890



## Attachments

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## Attachment I: Primary Agency Liaison Cover letter

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Dear <Participant's Name>

Recently you were contacted about the IRS Governmental Liaison and Disclosure (GLD) evaluation process. At this time we are requesting your help in gathering information about your agency's work with IRS GLD. We would like your input, as well as input from others within your agency.

The GLD evaluation is being administered in two parts.

- The first part, "Customer Satisfaction Evaluation for Primary Agency Liaison 2008," is attached and is directed to you for completion as an agency liaison.
- The second part, "Customer Satisfaction Evaluation for Users of IRS GLD Services and Products" will be sent to you separately, with instructions on distributing to other product users.

As a primary liaison with the IRS, you can provide important feedback to help improve the services provided by your IRS GLD Primary Contact, as well as improving the data exchange program. Your help gathering information during the second part of the process will improve the products and services used within your agency.

Please complete the attached evaluation and send it by 11/5/08 to the following email address:

[IRS.GLD.Tax.Agency.Survey@irs.gov](mailto:IRS.GLD.Tax.Agency.Survey@irs.gov)

The IRS Research organization will analyze the evaluation responses. Individual responses will be kept strictly anonymous. Only aggregate results will be provided to the IRS Office of Governmental Liaison and Disclosure.

If you have any questions concerning the evaluation administration, please contact Cait DeStefano at 856-237-7828. Questions concerning the evaluation content may be directed to Judith Howard at 603-628-7542.

Thank you for your help with the 2008 evaluation of GLD services. We appreciate your time and assistance in providing this valuable feedback.

Thank you,  
The IRS GLD Customer Satisfaction Evaluation Team

## Attachment II: Primary Agency Liaison Evaluation

IRS Office of Governmental Liaison & Disclosure (GLD)

**Customer Satisfaction Evaluation**

For  
**Primary Agency Liaison**

2008

*Please respond by 11/05/2008*

GLD Customer Satisfaction Evaluation  
For Primary Agency Liaison

OMB #1545-1432

Respond by 11/05/2008  
Page 1

For each question, please indicate your opinion by choosing a number from 1 to 5,  
"1" means "Very Dissatisfied" and "5" means "Very Satisfied"

PLEASE CHECK ONLY ONE BOX PER QUESTION.

Your working relationship with your IRS GLD primary contact						
Please indicate your satisfaction with:		(1) Very Dissatisfied	(2) Dissatisfied	(3) Neutral	(4) Satisfied	(5) Very Satisfied
1	Your working relationship with your IRS GLD Primary Contact.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	The understanding of your agency's needs shown by your IRS GLD Primary Contact.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	The responsiveness of your IRS GLD Primary Contact to your agency's needs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Your IRS GLD Primary Contact support of your agency's compliance <sup>1</sup> activities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	The IRS special initiatives programs (e.g., State Reverse File Match Initiative (SRFMI), Questionable Employment Tax Practices (QETP), State Audit Reports to IRS).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<sup>1</sup> Compliance includes case assistance, requests for specific taxpayer records, joint projects and use of taxpayer data from Transcript Delivery System (TDS) and Examination Operational Automation Database (EOAD) for tax compliance purposes.

GLD Customer Satisfaction Evaluation  
For Primary Agency Liaison

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IRS Program Implementation								
<p>We would like to determine, from your perspective, how well specific programs have been implemented. For the Programs shown in the table below, please select the obstacles, if any, that you encountered during implementation.</p> <p><b>(Please check all that apply – Leave blank if not applicable)</b></p>								
		Not Involved in this Program	Incomplete or Unclear Direction & Program Guidance from IRS	Insufficient Resources / Staffing within my agency	Computer Capacity / IT Issues within my agency	Program has a low priority for our Agency	Security Issues	Legislative Issues
6	Questionable Employment Tax Practices (QETP)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Disclosure of Information to Federal State and Local Agency (DIFSLA)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	State Audit Reports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	State Reverse File Match Initiative (SRFMI)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

10. Please identify additional obstacles not listed above (Please specify program).  
\_\_\_\_\_

GLD Customer Satisfaction Evaluation  
For Primary Agency Liaison

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Safeguards / Security						
Do you know the process for elevating Safeguard and Security issues? <input type="checkbox"/> Yes <input type="checkbox"/> No						
Please indicate your satisfaction with:		(1) Very Dissatisfied	(2) Dissatisfied	(3) Neutral	(4) Satisfied	(5) Very Satisfied
11	Your understanding of the requirements in Publication 1075, Tax Information Security Guidelines for Federal, State and Local Agencies and Entities (rev.10/2007) requirements.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12	IRS assistance resolving safeguard technical issues.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

  

Secure Data Transfer (SDT)						
Please indicate your satisfaction with:		(1) Very Dissatisfied	(2) Dissatisfied	(3) Neutral	(4) Satisfied	(5) Very Satisfied
13	IRS clearly communicating your responsibilities regarding SDT (e.g., record keeping, receipt and control and data flow).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

GLD Customer Satisfaction Evaluation For Primary Agency Liaison      OMB #1545-1432      Respond by 11/05/2008 Page 4

Overall Satisfaction						
		(1) Very Dissatisfied	(2) Dissatisfied	(3) Neutral	(4) Satisfied	(5) Very Satisfied
14	Overall, how satisfied are you with the services and products provided by your IRS GLD Primary Contact.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

15 What is your official title? \_\_\_\_\_

16 Which agency do you represent? Select One

17 How long have you worked in your current position? Select One

**We are particularly interested in any comments or suggestions you can provide.**

18 How can your IRS GLD Primary Contact improve services to your agency?  
\_\_\_\_\_

**Paperwork Reduction Act Notice**  
The Paperwork Reduction Act requires IRS to display an OMB Control Number on all approved information requests. About three minutes will be needed to complete this voluntary questionnaire. If you have any comments regarding the time estimates associated with this study or suggestions on making the process simpler, please write to:  
Internal Revenue Service  
Tax Products Coordinating Committee  
SEW/CAR/MP/T:GP  
1111 Constitution Ave. NW  
Washington, DC 20224  
Department of the Treasury - Internal Revenue Service

*Thank you for your time!*

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## Attachment III: Users of Products and Services Evaluation

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IRS Office of Governmental Liaison & Disclosure (GLD)

**Customer Satisfaction Evaluation**  
*For*  
**Users of IRS GLD Services and Products**  
2008

*Please respond by 11/05/2008*

GLD Customer Satisfaction Evaluation  
For Users of IRS GLD Services and Products      OMB #1545-1432      Respond by 11/05/2008  
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For each question, please indicate your opinion by choosing a number from 1 to 5,  
"1" means "Very Dissatisfied" and "5" means "Very Satisfied"  
*-Leave blank if not applicable-*

PLEASE CHECK ONLY ONE BOX PER QUESTION.

Disclosure					
Have you participated in disclosure training pertaining to federal tax information in the past 12 months? <input type="checkbox"/> Yes <input type="checkbox"/> No					
Please indicate your satisfaction with:	(1) Very Dissatisfied	(2) Dissatisfied	(3) Neutral	(4) Satisfied	(5) Very Satisfied
1. Your ability to carry out your disclosure responsibilities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. IRS assistance with disclosure matters.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. IRS explanations for delays or denials of requests for returns or return information (e.g., Form 8796).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

GLD Customer Satisfaction Evaluation  
For Users of IRS GLD Services and Products      OMB #1545-1432      Respond by 11/05/2008  
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Safeguards / Security						
Do you understand your responsibilities in reporting data breaches, to include lost and stolen federal tax information (Incident Reporting)? Yes <input type="checkbox"/> No <input type="checkbox"/>						
Please indicate your satisfaction with:	(1) Very Dissatisfied	(2) Dissatisfied	(3) Neutral	(4) Satisfied	(5) Very Satisfied	
4	Your ability to carry out your security responsibilities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	IRS assistance resolving incident response issues.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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 For Users of IRS GLD Services and Products      Page 3

Compliance Products and Services						
The next five questions are about the <b>compliance</b> products and services provided by the <i>IRS Governmental Liaison and Disclosure</i> office. Examples of these products and services include case assistance, requests for specific taxpayer records, joint projects, use of taxpayer data from the Transcript Delivery System (TDS) and from the Examination Operational Automation Database (EOAD).  If you are not a user please check here and skip to question 11. <input type="checkbox"/> ← Compliance Services do not apply						
Please indicate your satisfaction with:	(1) Very Dissatisfied	(2) Dissatisfied	(3) Neutral	(4) Satisfied	(5) Very Satisfied	
6	The <i>timeliness</i> of the information provided for your agency's <b>compliance</b> program.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	The <i>format</i> of the information provided for your agency's <b>compliance</b> program.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	The <i>clarity</i> of the information provided for your agency's <b>compliance</b> program.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	The <i>adequacy</i> (meets your needs) of the information provided for your agency's <b>compliance</b> program.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10	The <i>accuracy</i> of the information provided for your agency's <b>compliance</b> program.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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GL Data Exchange Program						
<p>The next five questions are about the <b>Governmental Liaison Data Exchange Program (GLDEP)</b> extracts overseen by the <i>IRS GLD Data Services Office</i>. This section is about the Customer Satisfaction with the timely delivery of extracts, specification books, and accuracy of extract information and/or updates provided (not Secure Data Transfer).</p> <p>If you do not use this program, please check here and skip to question 16.  <input type="checkbox"/> ← GLDEP does not apply</p>						
Please indicate your satisfaction with:		(1) Very Dissatisfied	(2) Dissatisfied	(3) Neutral	(4) Satisfied	(5) Very Satisfied
11	The <i>timeliness</i> of the information provided by the GLDEP.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12	The <i>format</i> of the information provided by the GLDEP.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13	The <i>clarity</i> of the information provided by the GLDEP.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14	The <i>adequacy</i> (meets your needs) of the information provided by the GLDEP.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15	The <i>accuracy</i> of the information provided by the GLDEP.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

GLD Customer Satisfaction Evaluation  
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Secure Data Transfer (SDT)						
Please indicate your satisfaction with:		(1) Very Dissatisfied	(2) Dissatisfied	(3) Neutral	(4) Satisfied	(5) Very Satisfied
16	The SDT Standard Operating Procedure document.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17	Support provided by IRS SDT help desk.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

  

Overall Satisfaction with IRS Products and Services						
		(1) Very Dissatisfied	(2) Dissatisfied	(3) Neutral	(4) Satisfied	(5) Very Satisfied
18.	Overall, how satisfied are you with the services and products provided by your IRS GLD Primary Contact.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

19. What is your official title? \_\_\_\_\_

20. Which agency do you represent? Select One

21. How long have you worked in your current position? Select One

GLD Customer Satisfaction Evaluation  
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*We are particularly interested in any comments or suggestions you can provide.*

22. How can IRS improve products and services provided by GLD?  
\_\_\_\_\_

**Paperwork Reduction Act Notice**  
The Paperwork Reduction Act requires IRS to display an OMB Control Number on all approved information requests. About three minutes will be needed to complete this voluntary questionnaire. If you have any comments regarding the time estimates associated with this study or suggestions on making the process simpler, please write to:  
Internal Revenue Service  
Tax Products Coordinating Committee  
SEW/CAR/MP/T/SP  
1111 Constitution Ave. NW  
Washington, DC 20224  
Department of the Treasury - Internal Revenue Service

*Thank you for your time!*

GLD Customer Satisfaction Evaluation  
For Users of IRS GLD Services and Products

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## Attachment IV: Users of Products and Services Cover letter

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Dear <Participant's Name>

This is the second part of a request for your help in gathering information about your agency's work with IRS Governmental Liaison and Disclosure (GLD). We would like your input, as well as input from others within your agency.

Please review the attached "Customer Satisfaction Evaluation for Users of IRS GLD Services and Products," and

- forward that evaluation for completion by anyone within your agency who receives any of the IRS Governmental Liaison and Disclosure services or products addressed in the evaluation
- ask those completing the evaluation to respond to all relevant questions and to provide comments as needed
- complete the evaluation yourself, including comments as needed.

Feedback from these customers and you will help us determine how to improve services and products provided by Governmental Liaison and Disclosure.

Please complete your evaluation and send it by 11/5/08 to the email address below. Please ask those in your agency who complete the "Customer satisfaction Evaluation for Users of IRS GLD Services and Products" to send their evaluations to the same address.

[IRS.GLD.Tax.Agency.Survey@irs.gov](mailto:IRS.GLD.Tax.Agency.Survey@irs.gov)

The IRS Research organization will analyze the evaluation responses. Individual responses will be kept strictly anonymous. Only aggregate results will be provided to the IRS Office of Governmental Liaison and Disclosure.

If you have any questions concerning the evaluation administration, please contact Cait DeStefano at 856-237-7828. Questions concerning the evaluation content may be directed to Judith Howard at 603-628-7542.

Thank you for your help with the 2008 evaluation of GLD services. We appreciate your time and assistance in providing this valuable feedback.

Thank you,  
The IRS GLD Customer Satisfaction Evaluation Team

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## Attachment V: Follow-up / Reminder notice

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Dear <Participants Name>

Recently, we sent the IRS Governmental Liaison and Disclosure (GLD) Customer Satisfaction Evaluation for you to complete. Our objective is to survey as many participants as possible who are familiar with the services provided by the GLD organization.

If you have not already sent in your response, please send it to the email address listed below. Your feedback is important to us. We will use it to improve the services and products we provide to you. We appreciate you taking the time to complete the evaluation and return it to the email address listed below no later than 11/05/08.

IRS.GLD.Tax.Agency.Survey@irs.gov

Responses will be kept anonymous. Only aggregate results will be provided to the IRS Office of Governmental Liaison and Disclosure.

If you have any questions concerning the evaluation administration, please contact Cait DeStefano at (856) 237-7828. Questions concerning the evaluation content may be directed to Judy Howard at (603) 628-7542.

Thank you for your help with the 2008 evaluation. We appreciate your time and assistance in providing this valuable feedback.

Thank you,  
The IRS GLD Customer Satisfaction Evaluation Team

## Attachment VI: GLD Agency Enrollment form

### 2008 IRS Governmental Liaison Data Exchange Program Enrollment Form

The three pages of the enrollment form must be submitted together, in addition to the need and use justification selections, in order to participate in the GL Data Exchange Program (GLDEP).

<b>State Abbreviation:</b> ▶	<b>Agency Name:</b> ▶	<b>Agency Code:</b> ▶
<b>Extract</b>	<b>Distribution Period</b>	<b>Indicate Participation</b>
1099 Misc. TY 2006	April 2008	<input type="checkbox"/>
Appeals EY2007 by TIN (Tickler)	May 2008	<input type="checkbox"/>
BMF EY2008 by EIN (Tickler)	Dec 2008	<input type="checkbox"/>
BMF EY 2008 by State Code ♦	Oct 2008	<input type="checkbox"/>
BMF EY 2008 by Zip Code (Tickler) ♦♦	Dec 2008	<input type="checkbox"/>
BRTF EY 2008 by EIN (Tickler)	Dec 2008	<input type="checkbox"/>
BRTF EY 2008 by State Code ♦	Nov 2008	<input type="checkbox"/>
BRTF EY2008 by Zip Code (Tickler) ♦♦	Dec 2008	<input type="checkbox"/>
Corporate Affiliations EY2008 by State Code	Sept 2008	<input type="checkbox"/>
Corporate Affiliations EY2008 by EIN (Tickler)	Sept 2008	<input type="checkbox"/>
CP2000 TY2006 by State Code ♦ Tolerance Total Adjustment to Income \$( )	Apr 2008 – Nov 2009	<input type="checkbox"/>
CP 2000 TY2006 by SSN (Tickler)	Dec 2009	<input type="checkbox"/>
CP2000 TY2006 by Zip Code – <b>Cities</b>	Apr 2008 – Nov 2009	<input type="checkbox"/>
Exam EY2007 by TIN (Tickler)	May 2008	<input type="checkbox"/>
<b>Examination Operational Automation Database (EOAD)</b>	<b>Jan 2008 – Dec 2008</b>	<input type="checkbox"/>
FEIN EY2008	Feb 2008 – Jan 2009	<input type="checkbox"/>
IMF EY2008 by SSN (Tickler)	Nov 2008	<input type="checkbox"/>
IMF EY2008 by State Code ♦	Sept 2008	<input type="checkbox"/>
IMF EY2008 by Zip Code (Tickler) ♦♦	Oct 2008	<input type="checkbox"/>
IRTF EY2008 by SSN (Tickler)	Nov 2008	<input type="checkbox"/>
IRTF EY2008 by State Code ♦	Sept 2008	<input type="checkbox"/>
IRTF EY2008 by Zip Code (Tickler) ♦♦	Oct 2008	<input type="checkbox"/>
IRMF TY2006 Payee by State Code	Jun 2008	<input type="checkbox"/>
IRMF TY2006 Non-Resident K-1 ♦♦♦	Sept 2008	<input type="checkbox"/>
Optional Non-Resident W-2/1099-MISC	♦♦♦	<input type="checkbox"/>
ITIN EY2008	Feb 2008 – Jan 2009	<input type="checkbox"/>
Levy TY2007 by TIN (Ticklers)	May 2008 – Apr 2009	<input type="checkbox"/>
Military Combat Zone EY2008 by State Code ♦	Jan 2008 – Dec 2008	<input type="checkbox"/>
Non-Itemizer EY2008	Nov 2008	<input type="checkbox"/>
PTIN EY2008	Jan-Apr-Jul-Oct 2008	<input type="checkbox"/>
TAR EY2008 by SSN (Tickler)	Feb 2008 - Jan 2009	<input type="checkbox"/>

- ♦ Extracts available to states only
- ♦♦ Tickler submission required for state agencies only. City agency zip codes are preprogrammed.
- ♦♦♦ Participation for the IRMF Non-Resident K-1 extract is required in order to select the optional Non-Resident W-2/1099-MISC.

TY – Tax Year: Information extracted for a specific tax year.  
EY – Extract Year: Period of processing time the extract covers other than a specific tax year.

**2008 IRS Governmental Liaison Data Exchange Program  
Enrollment Form (Cont'd)**

The **State Reverse File Match Initiative (SRFMI)** Enrollment must be completed by all State Taxing Agencies that enrolled for the **IMF/IRTF Extracts by State Code** and/or the **BMF/BRTF Extracts by State Code**.

<b>Governmental Liaison Data Exchange Program Enrollment Form State Reverse File Match Initiative (SRFMI)</b>			
<b>State Abbreviation:</b> ▶	<b>Agency Name:</b> ▶	<b>Agency Code:</b> ▶	
<b>SRFMI Extract</b>	<b>Date State File Due to IRS</b>	<b>Indicate Participation</b>	
		<b>Yes</b>	<b>No</b>
<b>SRFMI for Individual</b> Agencies must have enrolled for the IMF/IRTF Extracts by State Code on Page 1. The extracts by SSN can also be incorporated into the SRFMI process.	July 15, 2009	<input type="checkbox"/>	<input type="checkbox"/>
<b>SRFMI for Corporate</b> Agencies must have enrolled for the BMF/BRTF Extracts by State Code on Page 1. The extracts by EIN can also be incorporated into the SRFMI process.	July 15, 2009	<input type="checkbox"/>	<input type="checkbox"/>
<b>SRFMI for Withholding</b> Agencies must have enrolled for the BMF/BRTF Extracts by State Code on Page 1. The extracts by EIN can also be incorporated into the SRFMI process.	July 15, 2009	<input type="checkbox"/>	<input type="checkbox"/>
<b>SRFMI for Sales</b> Agencies must have enrolled for the BMF/BRTF Extracts by State Code and the IMF/IRTF Extracts by State Code on Page 1. The IMF/IRTF Extracts by SSN and the BMF/BRTF Extracts by EIN can also be incorporated into the SRFMI process.	July 15, 2009	<input type="checkbox"/>	<input type="checkbox"/>

- The State Reverse File Match Initiative (SRFMI) Enrollment must be completed by all State Taxing Agencies that enrolled for the IMF/IRTF Extracts by State Code or SSN and/or the BMF/BRTF Extracts by State Code or EIN
- The IRS has started to receive state data that will help identify federal nonfilers and underreporters. Under the State Reverse File Match Initiative (SRFMI), states will supply individual income tax, corporate income tax, sales tax, and withholding data annually to IRS.
- IRS will use the SRFMI data in compliance programs, including field audits and collections, correspondence audits, the Automated Substitute for Return Program, and the Automated Underreporter Program. All IRS operating divisions will be potentially able to access and use the state data.
- Your IRS Governmental Liaison can provide you with additional information concerning participation in SRFMI to include a copy of the Specification Book. Specific questions concerning SRFMI can also be sent to the SRFMI Mailbox at [SBSE.SRFMI@irs.gov](mailto:SBSE.SRFMI@irs.gov).
- Beginning with the 2008 Governmental Liaison Data Exchange Program (GLDEP) Enrollment Form, SRFMI has become a permanent part of the enrollment process.

2008 IRS Governmental Liaison Data Exchange Program Enrollment Form (Cont'd)		
State Abbreviation: ▶	Agency Name: ▶	Agency Code ▶
1 <sup>st</sup> Line Street Address For Requesting Agency: ▶		
2 <sup>nd</sup> Line Street Address ▶		Room Number: ▶
City: ▶	State: ▶	Zip: ▶
<input type="checkbox"/> New Address (Check if appropriate)		
Authorizing Official for Requesting Agency (Typed): ▶		Title: ▶
Signature of Agency Authorizing Official <b>THE GLDEP NEED AND USE JUSTIFICATION LIST MUST BE COMPLETED AND ATTACHED TO THIS ENROLLMENT FORM.</b> ▶		Date: ▶
I acknowledge that the extract information received from the IRS is federal tax information that must be safeguarded at all times in accordance with 26 U.S.C. 6103(p)(4) and the guidelines described in Publication 1075. I further acknowledge that FTI is to be used only in accordance with the provisions of IRC 6103(d) for the purpose of, and to the extent necessary, in state tax administration.		
Requesting Agency's Contact for Data Exchange Extract Questions (Typed)		Telephone: ▶
▶ Name:		Fax: ▶
▶ Title:		
▶ E-Mail:		
<b>BELOW SECTION IS FOR IRS SIGNATURES AND CERTIFICATION</b>		
Signature of Authorizing IRS Disclosure Manager certifying the "GLDEP Need and Use" of this information for the above agency in accordance with IRC 6103(d)(1):		
Type Name ▶	Signature ▶	Date: ▶
		Telephone: ▶
Signature of Authorizing IRS Governmental Liaison to certify agency participation: I certify that by signing this enrollment form, I have compared the current year's enrollment to that of the previous year, researched any discrepancy, and have contacted the agency as necessary.		
Type Name: ▶	Signature: ▶	Date: ▶
		Telephone: ▶

IRS GLDEP 2008 Enrollment Form (Rev. 8/2007)