Attachment I: Primary Agency Liaison Cover letter

Dear <participant>

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 2010," 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 6/25/10 to the following email address:

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

The IRS Research organization will analyze the evaluation responses. Individual responses will be not be shared. 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:

John Kennedy of SB/SE Research at 856-237-7996

Questions concerning the evaluation content may be directed to:

Pamela Kozik of CLD at 860-756-4755.

Thank you for your help with the 2010 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 2010

Please respond by 6/25/2010

GLD Customer Satisfaction Evaluation For Primary Agency Liaison

OMB #1545-1432

	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.									
2	The understanding of your agency's needs shown by your IRS GLD Primary Contact.									
3	The responsiveness of your IRS GLD Primary Contact to your agency's needs.									
4	Your IRS GLD Primary Contact support of your agency's compliance ¹ activities.									
5	The IRS GLD communications and assistance on special projects, e.g., State Reverse File Match Initiative (SRFMI), Questionable Employment Tax Practices (QETP), State Audit Report Program (SARP).									

GLD Customer Satisfaction Evaluation For Primary Agency Liaison

OMB #1545-1432

¹ 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.

		IRS Pro	gram Imple	ementation				
We would like t Programs shown	to determine, from in the table belo							
(Please check all that apply – Leave blank if not applicable)								
	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 QETP (Questional: Employment Tax Practice	nt U							
7 DIFSLA (Disclosure Information Federal Sta and Local Agency)	to 🗆							
8 SARP (State Aud Report Program)								
SRFMI (State 9 Reverse Fii Match Initiative)	le 🔲							

OMB Submission 2010 GLD Customer Satisfaction Evaluation

V	ou know the process for elevating Safeg	Safeguards		Yes □ No		
- ,	Please Indicate your satisfaction with:	(1) Very Dissatisfied	(2)	(3) Neutral	(4) Satisfied	(5) Very Satisfied
11	Publication 1075, Tax Information Security Guidelines for Federal, State and Local Agencies and Entities (rev. 10/2007) in terms of ease of understanding.					
12	IRS assistance resolving safeguard technical issues.					
	Sec Please Indicate your satisfaction with:	cure Data T (1) Very Dissatisfied	ransfer (SDT (2) Dissatisfied	(3) Neutral	(4) Satisfied	(5) Very Satisfied
3	IRS clearly communicating your responsibilities regarding SDT (e.g., record keeping, receipt and control and data flow).					

2010 GLD Customer Satisfaction Evaluation

		Overall Sa	ntisfaction			
		(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.					

- 15. What is your official title?
- 16. Which agency do you represent?
- 17. How long have you worked in your current position?

(For Question 18, we are interested in any comments or suggestions you can provide, particularly those areas where your response was a 1 (Very Dissatisfied) or 2 (Dissatisfied).

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

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
Tar Products Coordinating Committee
SEW/CAR MP-IT.1SP
1111 Constitution Ave. NIV

Washington, DC 20224

Department of the Treasury – Internal Revenue Service

Thank you for your time!

GLD Customer Satisfaction Evaluation For Primary Agency Liaison

OMB #1545-1432

Attachment III: Users of Products and Services Evaluation

IRS Office of Governmental Liaison & Disclosure (GLD)

Customer Satisfaction Evaluation
For
Users of IRS GLD Services and Products
2010

Please respond by 6/25/2010

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

OMB #1545-1432

		y Dissatisfied ~Leave blank		ins "Very Sat ble∼	isfied"	o 5,
		Disclo	sure			
На	as the IRS provided training to your age	ency pertaining	to federal tax i	nformation du	ring the past 1	2 months?
	Please indicate your satisfaction with:	(1) Very Dissatisfied	(2) Dissatisfied	(3) Neutral	(4) Satisfied	(5) Very Satisfied
	Materials developed by the IRS to help you understand and implement your Disclosure responsibilities. These include the	П				
1.	Disclosure Awareness Pocket Guide and the video presentation, Protecting Federal Tax Information:					
1. 2.	Disclosure Awareness Pocket Guide and the video presentation,					

	s	afeguards	/ Security			
	Do you understand your respons federal t		rting data breed (Incident Repo		e lost and stole	en
	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.					
5	IRS assistance resolving incident response issues.					

OMB Submission 2010 GLD Customer Satisfaction Evaluation

	Compl	ance Products and Services					
Lia	ne next five questions are about the co aison and Disclosure office. Examples ific taxpayer records, joint projects, use the Examination If you are not a us	of these produ e of taxpayer d Operational A er please chec	cts and service ata from the Tr utomation Data	es include case anscript Delive abase (EOAD) to question 1	e assistance, re ery System (TE	equests for	
	Please indicate your satisfaction with:	(1) Very Dissatisfied	(2) Dissatisfied	(3) Neutral	(4) Satisfied	(5) Very Satisfied	
6	The timeliness of the information provided for your agency's compliance program.						
7	The format of the information provided for your agency's compliance program.						
8	The <i>clarity</i> of the information provided for your agency's compliance program.						
9	The adequacy (meets your needs) of the information provided for your agency's compliance program.						
10	The accuracy of the information provided for your agency's compliance program.						

	GL	Data Excha	nge Progra	m					
ove	The next six questions are about the G erseen by the <i>IRS GLD Data Services</i> (very of extracts, specification books, an	Office. This see	ction is about the extract informa	he Customer S	atisfaction wit	h the timely			
	If you do not use this program, please check here and skip to question 17. ☐ ← GLDEP does not apply								
	ase indicate your satisfaction rel with each of the following statements:	(1) Very Dissatisfied	(2) Dissatisfied	(3) Neutral	(4) Satisfied	(5) Very Satisfied			
11	The GLDEP extracts are delivered as scheduled.								
12	The format of the file matches the record layout in the Specification Book.								
13	The Specification Books are understandable.								
14	You are receiving the information for which you've enrolled.								
15	The extracts provide information that generates tax revenue for our agency.								
16	The extract information is accurate.								

Secure Data Transfer (SDT)										
	Please Indicate your satisfaction with:	(1) Very Dissatisfied	(2) Dissatisfied	(3) Neutral	(4) Satisfied	(5) Very Satisfied				
17	The SDT Trading Partner Handbook.									
18	Support provided by the IRS Help Desk for SDT.									
	Overall Satisfac	tion with IR				(5)				
		Very Dissatisfied	(2) Dissatisfied	(3) Neutral	(4) Satisfied	Very Satisfied				
	Overall, how satisfied are you with the services and products provided by your IRS GLD Primary Contact.									
19.	-, , ,									
	/hat is your official title?									
20. W										

2010 GLD Customer Satisfaction Evaluation

23. Re: Disclosure.	What do you think would be a reasonable response processing time, within which the IRS should be
able to provide	the type of tax records you usually request?

24. How can IRS improve products and services provided by GLD? We are particularly interested in comments or suggestions for items which you rated as 1 (Very Dissatisfied) or 2 (Dissatisfied).

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

OMB #1545-1432

Attachment IV: Users of Products and Services Cover letter

Dear <participant>,

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 5/21/10 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

The IRS Research organization will analyze the evaluation responses. Individual responses will not be shared. 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:

John Kennedy of SB/SE Research at 856-237-7996

Questions concerning the evaluation content may be directed to:

Pamela Kozik of CLD at 860-756-4755.

Thank you for your help with the 2010 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 V: Follow-up / Reminder notice

Dear <participant>,

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 6/25/10.

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

Responses will no be shared. 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:

John Kennedy of SB/SE Research at 856-237-7996

Questions concerning the evaluation content may be directed to:

Pamela Kozik of CLD at 860-756-4755.

Thank you for your help with the 2010 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

2010 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).

State Abbreviation: Agency Name:	Agency Co ▶	ode:
Extract	Distribution Period	Indicate Participation
1099 Misc. TY 2008	April 2010	
Appeals EY 2009 by TIN (Tickler)	May 2010	
BMF EY 2010 by EIN (Tickler)	Dec 2010	
BMF EY 2010 by State Code ◆	Oct 2010	
BMF EY 2010 by Zip Code (Tickler) ◆◆	Dec 2010	
BRTF EY 2010 by EIN (Tickler)	Dec 2010	
BRTF EY 2010 by State Code ◆	Nov 2010	
BRTF EY 2010 by Zip Code (Tickler) ♦◆	Dec 2010	
Corporate Affiliations EY 2010 by State Code	Sept 2010	
Corporate Affiliations EY 2010 by EIN (Tickler)	Sept 2010	
CP2000 TY 2008 by State Code ♦ Tolerance Total Adjustment to Income \$()	Apr 2010 – Nov 2011	
CP2000 TY 2008 by Zip Code - Cities	Apr 2010 - Nov 2011	
CP 2000 TY 2008 by SSN (Tickler)	Dec 2011	
Exam EY 2009 by TIN (Tickler)	May 2010	
Examination Operational Automation Database (EOAD) by State Code EY 2010	Feb 2010 – Jan 2011	
Examination Operational Automation Database (EOAD) EY 2010 by TIN (Tickler)	Feb 2010 - Jan 2011	
FEIN EY 2 010	Feb 2010 - Jan 2011	
IMF EY 2010 by SSN (Tickler)	Nov 2010	
IMF EY 2010 by State Code ◆	Sept 2010	
IMF EY 2010 by Zip Code (Tickler) ♦◆	Oct 2010	
IRTF EY 2010 by SSN (Tickler)	Nov 2010	
IRTF EY 2010 by State Code ◆	Sept 2010	
IRTF EY 2010 by Zip Code (Tickler) ◆◆	Oct 2010	
IRMF TY 2008 Payee by State Code	Jun 2010	
IRMF TY 2008 Non-Resident K-1 ♦ ♦ ♦	Sept 2010	
Optional Non-Resident W-2/1099-MISC	***	
ITIN EY 2010	Feb 2010 - Jan 2011	
Levy TY 2009 by TIN (Ticklers)	May 2010 - Apr 2011	
Military Combat Zone EY 2010 by State Code ◆	Jan - Dec 2010	
Non-Itemizer EY 2010	Nov 2010	
PTIN EY 2010	Jan-Apr-Jul-Oct 2010	
TAR EY 2010 by SSN (Tickler)	Feb 2010 - Jan 2011	

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.

The default will be ASCII format for extracts distributed via Secure Data Transfer.

2010 IRS Governmental Liaison Data Exchange Program Enrollment Form (Cont'd)

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

State Workforce Agencies and Cities cannot participate in the SRFMI Programs.

State Abbreviation:	Agency Name:		Agend	y Code:	
	>		>		
		Date State File	Indicate Participation		
EY 2010 SRFMI EX	tracts	Due to IRS	Yes	No	
	lled for the IMF/IRTF Extracts The extracts by SSN can also	July 15, 2011			
	lled for the BMF/BRTF Extracts The extracts by EIN can also RFMI process.	July 15, 2011			
	lled for the BMF/BRTF Extracts The extracts by EIN can also	July 15, 2011			
SRFMI for Sales Agencies must have enro by State Code and the IM on Page 1. The IMF/IRTF	lled for the BMF/BRTF Extracts F/IRTF Extracts by State Code Extracts by SSN and the N can also be incorporated into	July 15, 2011			
Agencies that conduct	an amnesty should include the	e amnesty records in the	ir SRFMI proces	sing.	
	cies must also check one o	r both of the following	two hoves if ar	nlicable.	

Your IRS Governmental Liaison can provide you with additional information concerning participation in SRFMI.

2010 IRS Governmental Liaison Data Exchange Program Enrollment Form (Cont'd)		
State Abbreviation: Agency Name:		Agency Code
>		>
1 st Line Street Address For Requesting Agency: ▶		
2 nd Line Street Address		Room Number:
Section of State		>
City:	State:	Zip:
<u> </u>	<u> </u>	>
New Address (Check if appropriate)		
Authorizing Official for Requesting Agency (Typed):		Title:
>		•
Signature of Agency Authorizing Official THE GLDEP NEED AND USE		Date:
JUSTIFICATION LIST MUST BE COMPLETED AND ATTACHED TO THIS ENROLLMENT FORM.		•
>		
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:		>
Title:		Fax:
		>
► E-Mail:		
BELOW SECTION IS FOR IRS SIGNATURES AND CERTIFICATION		
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:
Type Nume	Signature	>
▶	▶	Track in
		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 discrepancies, and have contacted the agency as necessary.		
Type Name:	Signature:	Date:
▶		>
	•	Telephone: ▶

IRS GLDEP 2010 Enrollment Form (Rev. 8/2009)

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