

DATE

FIRSTNAME LASTNAME
SAMPLE ADDRESS 1
SAMPLE ADDRESS 2
SAMPLE ADDRESS 3 POSTAL CODE

Dear FIRSTNAME LASTNAME

The IRS needs your help with an important research initiative to improve IRS service to U.S. taxpayers who live outside the United States. In the next few days, you will receive a request to complete a brief questionnaire about IRS services. This study is an important one that will help the IRS identify gaps in international service and improve current services to U.S. taxpayers who live outside of the United States. The IRS has teamed up with Pacific Consulting Group (PCG) to conduct the survey.

Your individual responses will be anonymous to the IRS and your participation in this study is voluntary. However, we would greatly appreciate your feedback by completing a short survey that takes about 10 minutes to complete.

This questionnaire is also available online in English and Spanish. Please visit the following website and use the log in information below.

El cuestionario está disponible en inglés y español en el internet. Por favor visite la siguiente dirección de internet y utilice la clave y contraseña proporcionadas abajo.

<http://internationaltaxpayer.pcgfirm.com>

Username: _____ **Password:** _____

I am committed to improving IRS service to every taxpayer. Please help me in this effort by completing the survey online or by mail and returning the questionnaire as soon as possible. If you do not receive a paper questionnaire in a few days, please contact Lyndie Berkowitz by telephone at US (650) 327-8108 or by e-mail at irsintlsurvey@pcgfirm.com.

Thank you in advance for your cooperation.

Sincerely,

Mark. E. Pursley
Director, Research and Analysis
Wage and Investment Division

Pacific Consulting Group/Scantron

IRS Customer Survey
P.O. Box 64530

DATE

FIRSTNAME LASTNAME
SAMPLE ADDRESS 1
SAMPLE ADDRESS 2
CITY, COUNTRY POSTAL CODE

Dear FIRSTNAME LASTNAME

A few days ago, you received a letter from Mark Pursley, Research and Analysis Director, Wage and Investment Division of the Internal Revenue Service, asking for your assistance with an important research project to help improve the service provided to taxpayers who live outside the United States.

We are administering a survey to a random sample of taxpayers who live outside the United States. We want to know your opinions about your experiences with services provided by the IRS. Your responses are critical to the accuracy of this research and will help the IRS to better improve its service.

All responses are anonymous to the IRS and will be released only as summaries in which no individual answers can be identified. This survey is voluntary. The questionnaire should take about 10 minutes to complete. Please use the postage-paid reply envelope to return your completed questionnaire.

This questionnaire is also available online in English and Spanish. Please visit the following website and use the log in information below.

El cuestionario está disponible en inglés y español en el internet. Por favor visite la siguiente dirección de internet y utilice la clave y contraseña proporcionadas abajo.

<http://internationaltaxpayer.pcgfirm.com>

Username: Password:

The IRS is committed to improving its performance and service to the public. Your honest opinions will help bring about these improvements. If you have any questions or concerns, please feel free to contact Lyndie Berkowitz at US (650) 327-8108 or by e-mail at irsintlsurvey@pcgfirm.com. Thank you in advance for your cooperation.

Sincerely,



Dr. Peter Webb
Project Director

Do We Have Your Input Yet?

Pacific Consulting Group/Scanlon
IRS Customer Survey

P.O. Box 64530

Seattle, WA 98164-9630 USA

OMB 1545-1432.

Recently, you received a questionnaire asking your opinions about ways to improve IRS service to U.S. taxpayers who live outside the United States. If you have already completed and returned the questionnaire, please accept our sincere thanks. If not, please take a few minutes to complete it and return it today. We want to be sure we have your opinions and suggestions.

If you did not receive the questionnaire, or it got misplaced, please contact Lyndie Berkowitz by telephone at US 1-650- 327-8108 or by e-mail at irsintlsurvey@pcgfirm.com.

Dr. Peter Webb
Project Director

Pacific Consulting Group/Scantron

IRS Customer Survey
P.O. Box 64530
St. Paul, MN 55164-9610 USA

DATE

FIRSTNAME LASTNAME
SAMPLE ADDRESS 1
SAMPLE ADDRESS 2
CITY, COUNTRY POSTAL CODE

Dear FIRSTNAME LASTNAME

A few weeks ago, I sent you a questionnaire about services the IRS provides to U.S. taxpayers who live outside of the United States. So far, we have not received your completed survey. If you have not already done so, please take a few minutes to answer the survey questions.

We are administering a survey to a random sample of taxpayers who live outside the United States. We want to know your opinions about your experiences with services provided by the IRS. Your responses are critical to the accuracy of this research and will help the IRS to better improve its services to taxpayers who live outside of the U.S..

All responses are anonymous to the IRS and your participation is voluntary. Your responses will be grouped with others, so that no single reply can be traced back to an individual. The questionnaire is quite brief and should take about 10 minutes to complete. Please use the postage-paid reply envelope to return your completed questionnaire.

This questionnaire is also available online in English and Spanish. Please visit the following website and use the log in information below.

El cuestionario está disponible en inglés y español en el internet. Por favor visite la siguiente dirección de internet y utilice la clave y contraseña proporcionadas abajo.

<http://internationaltaxpayer.pcgfirm.com>

Username: Password:

The IRS is committed to improving its performance and service to the public. Your honest opinions will help bring about these improvements. If you have any questions or concerns, please feel free to contact Lyndie Berkowitz at US (650) 327-8108 or by e-mail at irsintlsurvey@pcgfirm.com. Thank you in advance for your cooperation.

Sincerely,



Dr. Peter Webb
Project Director

IRS SURVEY OF INTERNATIONAL TAXPAYERS

The IRS is trying to improve its service to taxpayers living outside the United States. You can help in this important mission by answering the questions below. This voluntary survey should take approximately ten minutes to complete. **Your responses will be kept completely anonymous to the IRS.** If you have any questions about this survey, you may call The Survey Processing Center at US 1-650-327-8108.

For each resource listed below, please answer the following questions:

1. Are you aware of the resource?
2. (If you are aware of the resource), did you use the resource in preparing your most recent US tax return?
3. (If you used the resource), how satisfied were you with the resource used satisfaction?

	1 Aware of IRS Service		2 Use IRS Service to complete most recent tax return		3 Satisfaction with Resource Used				
	Yes	No	Yes	No	Very Dissatisfied	Somewhat Dissatisfied	Neither Satisfied nor Dissatisfied	Somewhat Satisfied	Very Satisfied
IRS telephone line (1-215-516-2000)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Yes <input type="checkbox"/>	No <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IRS Staff at a USEmbassy or Consulate by telephone	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Yes <input type="checkbox"/>	No <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IRS.gov Website (to actively locate information, not for casual browsing)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Yes <input type="checkbox"/>	No <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
International Section of IRS.gov	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Yes <input type="checkbox"/>	No <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
International Taxpayer Frequently Asked Question (FAQ) section of IRS.gov	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Yes <input type="checkbox"/>	No <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tax Trails section of IRS.gov	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Yes <input type="checkbox"/>	No <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
US Embassy Website for Tax Information	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Yes <input type="checkbox"/>	No <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E-mail to IRS through IRS.gov	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Yes <input type="checkbox"/>	No <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E-mail to IRS through US Embassy	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Yes <input type="checkbox"/>	No <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Letter sent to IRS	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Yes <input type="checkbox"/>	No <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
US Embassy and Consulate with On-site IRS Assistance(Frankfurt,	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Yes <input type="checkbox"/>	No <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

London, Paris, Puerto Rico)								
IRS Publication 54 Tax Guide for U.S. Citizens & Resident Aliens Abroad	Yes <input type="checkbox"/>	Yes <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	No <input type="checkbox"/>	No <input type="checkbox"/>						
IRS Publication 901 U.S. Tax Treaties	Yes <input type="checkbox"/>	Yes <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	No <input type="checkbox"/>	No <input type="checkbox"/>						
IRS Brochure Publication 4732: Federal Tax Information for U.S. Taxpayers Living Abroad	Yes <input type="checkbox"/>	Yes <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	No <input type="checkbox"/>	No <input type="checkbox"/>						
IRS Form 2555 Foreign Earned Income	Yes <input type="checkbox"/>	Yes <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	No <input type="checkbox"/>	No <input type="checkbox"/>						
IRS Form 1116 Foreign Tax Credit	Yes <input type="checkbox"/>	Yes <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	No <input type="checkbox"/>	No <input type="checkbox"/>						
Other IRS service (please specify)	Yes <input type="checkbox"/>	Yes <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	No <input type="checkbox"/>	No <input type="checkbox"/>						

4.(If you called IRS by telephone) Did you personally pay for any of the calls made?

Yes _____ No _____

5. For each of the ways that you contacted the IRS in Question 2, were you able to obtain the information that you were seeking?

IRS telephone line (1-215-516-2000)	Yes <input type="checkbox"/>	No <input type="checkbox"/>
IRS Staff at a US Embassy or Consulate by telephone	Yes <input type="checkbox"/>	No <input type="checkbox"/>
IRS.gov Website (to actively locate information, not for casual browsing)	Yes <input type="checkbox"/>	No <input type="checkbox"/>
International Section of IRS.gov	Yes <input type="checkbox"/>	No <input type="checkbox"/>
International Taxpayer Frequently Asked Question (FAQ) section of IRS.gov	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Tax Trails section of IRS.gov	Yes <input type="checkbox"/>	No <input type="checkbox"/>
US Embassy Website for Tax Information	Yes <input type="checkbox"/>	No <input type="checkbox"/>
E-mail to IRS through IRS.gov	Yes <input type="checkbox"/>	No <input type="checkbox"/>
E-mail to IRS through US Embassy	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Letter sent to IRS	Yes <input type="checkbox"/>	No <input type="checkbox"/>
US Embassy and Consulate with On-site IRS Assistance(Frankfurt, London, Paris, Puerto Rico)	Yes <input type="checkbox"/>	No <input type="checkbox"/>
IRS Publication 54 Tax Guide for U.S. Citizens & Resident Aliens Abroad	Yes <input type="checkbox"/>	No <input type="checkbox"/>
IRS Publication 901 U.S. Tax Treaties	Yes <input type="checkbox"/>	No <input type="checkbox"/>
IRS Brochure Publication 4732: Federal Tax Information for U.S. Taxpayers Living Abroad	Yes <input type="checkbox"/>	No <input type="checkbox"/>
IRS Form 2555 Foreign Earned Income	Yes <input type="checkbox"/>	No <input type="checkbox"/>
IRS Form 1116 Foreign Tax Credit	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Other IRS service specified previously	Yes <input type="checkbox"/>	No <input type="checkbox"/>

5a. If you did not get the information you needed, please tell us why you did not get the information you were seeking.

6. In preparing your US federal taxes while living outside of the US, please indicate **where you have received information in the past** for each of the following issues: (a) Whether or not you need to file US federal taxes and determining if specific income is taxable (b) tax treaties (c) resolving a notice or letter from the IRS (d) making a payment, and (e) obtaining an Individual Tax ID Number (ITIN). Please check all that apply.

Sources for Receiving Information in the Past	a) Questions about Filing Requirement/Taxable Income	b) Tax Treaties	c) Resolving Notice/letter from IRS	d) Making a Payment	e) Obtain ITIN
IRS.gov	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Call the IRS telephone line (1-215-516-2000)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IRS Publication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accountant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
US Embassy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employer/Union/Trade Organization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Family/Friend	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Non-IRS Books and Publications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Non-IRS Website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
American Citizens Abroad (ACA)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Association of Americans Residing Overseas (AARO)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Federation of American Women's Clubs Overseas (FAWCO)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Social/Community Organization (For example, church, community center, school)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tax preparation software	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other Please Specify _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7. Which resources would you be **willing to use in the future** for each of the following issues: (a) Whether or not you need to file US federal taxes and determining if a specific income is taxable (b) tax treaties (c) resolving a notice or letter from the IRS (d) making a payment, and (e) obtaining an Individual Tax ID Number (ITIN). Please check all that apply.

Additional Sources for Receiving Information in the Future	a) Questions about Filing Requirement/ Taxable Income	b) Tax Treaties	c) Resolving Notice/letter from IRS	d) Making a Payment	e) Obtain ITIN
IRS.gov	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Call the IRS telephone line (1-215-516-2000)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IRS Publication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accountant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
US Embassy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employer/Union/Trade Organization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Family/Friend	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Non-IRS Books and Publications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Non-IRS Website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
American Citizens Abroad (ACA)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Association of Americans Residing Overseas (AARO)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Federation of American Women’s Clubs Overseas (FAWCO)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Social/Community Organization (For example, church, community center, school)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tax preparation software	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other Please Specify _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Yes No

8. If you had to read tax instructions from the IRS, would you prefer the instructions be written in English or another language?

- English
- Another language. Please Specify _____

9. If you had to speak to an IRS representative, would you prefer to speak in English or another language?

- English
- Another language. Please specify _____

10. What tax topics, additional products or services would you like the IRS to offer to international taxpayers?

Finally, we have a few questions for classification purposes.

11. Who prepared your most recent US Federal tax return? **(Please select one option)**

- You or your spouse
- A friend or family member (relative)
- The IRS
- Volunteer Income Tax Clinic (VITA) or Military Volunteer Income Tax Clinic
- A paid tax professional in the United States
- A paid tax professional outside of the United States
- Employer
- Someone else (Please specify)_____

11a. (If answer to Q11 is you or your spouse) Did you use tax software when you prepared your most recent US Federal tax return?

- Yes
- No

12a. Approximately, how much total time (number of hours) did you or your spouse spend on activities related to your most recent US income tax return? Include time spent for activities such as record keeping, gathering tax materials, tax planning, form completion and form submission

_____hours

12b. Approximately how much money (in US dollars), if any, did you spend on expenses related to your most recent US income tax return? Include any fees for a paid professional, tax preparation software, faxes, delivery, postage, classes or books.

US dollar amount \$_____

13. How was your most recent US federal tax return filed? **(Please select one option)**

- Filed by regular or express mail
- Filed electronically (e-file)
- Delivered in person to a US Embassy or other IRS office
- Not sure, filed by someone else

(Skip Q14 and ask Q14 a. Auto fill Q14 with answer "YES")

14. Do you have Internet access?

- No

Yes ⇒ 14a. From where do you access the Internet? **(Please mark all that apply)**

- Home,
- Work,
- Public library or other public place (For example, school, internet café)
- Mobile/Cell phone

15. What is your employment status?

- Student, working part time.....1
- Student, working full time..... 2
- Full time student 3
- Employed full time.....4
- Employed part time.....5

Not employed, but looking for work.....6
Not employed and not looking for work.....7
Retired, working part time.....8
Retired, not employed.....9

16. What is the highest level of education you have completed?

Grade School.....1
Some High School.....2
High School Diploma/GED.....3
Trade/Vocational School.....4
Some College.....5
Associate’s Degree.....6
Bachelor’s Degree.....7
An advanced degree (including Masters, Doctoral and professional degrees) 8

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 to P.O. Box 64530, St. Paul, MN 55164-9610 USA