

IRS WAGE AND INVESTMENT
 CUSTOMER SATISFACTION SURVEY
 ACCOUNTS MANAGEMENT/ADJUSTMENTS

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 5 minutes to complete. Your responses will be kept completely anonymous to the IRS. If you have questions about this survey, you may call the Survey Helpline at 1-866-960-7897.

The questions that follow ask your opinion regarding the recent correspondence or an amended return you have sent to the IRS regarding a tax matter. For each question, regardless of whether you agree or disagree with the final outcome, please indicate your answer by checking the box that best represents your opinion. If the question does not apply to your situation, check the box labeled "Don't Know/Not Applicable."

1.

	Very Dissatisfied	Somewhat Dissatisfied	Neither Satisfied Nor Dissatisfied	Somewhat Satisfied	Very Satisfied	Don't Know/Not Applicable
a. Ease of understanding the initial notice and what was requested of you?	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
b. Appropriateness of the tone of IRS correspondence concerning your issue?	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
c. Completeness of instructions you received for resolving your issue?		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	
d. Ease of providing information requested by the IRS?						
e. Ease of understanding responses from the IRS?						
f. Ease of getting more information about your issue?						
g. IRS keeping you informed about the status of your case? (If "Very Dissatisfied or "Somewhat Dissatisfied" rating): Why did you give this item a low rating?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
h. Explanation regarding the resolution of your issue? i. Length of time it took to resolve the issue? (If "Very Dissatisfied or "Somewhat Dissatisfied"	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>

<i>rating</i>): Why did you give this item a low rating?						
j. Fairness of treatment by the IRS?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
k. Regardless of whether you agree or disagree with the final outcome, how would you rate your overall satisfaction with the way your issue was handled?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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<p>2. Did you write or send an amended return to the IRS because the IRS sent you a notice or a letter?</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>4. Have you contacted the IRS about this time same issue for any prior year's tax return?</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p>3. What method(s) did you use to contact the IRS about this issue? (Please mark all that apply)</p> <p><input type="checkbox"/> E-mail <input type="checkbox"/> In person <input type="checkbox"/> Mail <input type="checkbox"/> Other <input type="checkbox"/> Toll-Free line</p>	<p>5. How would you rate the level of service received from this contact Versus previous contacts?</p> <p><input type="checkbox"/> Better <input type="checkbox"/> Worse <input type="checkbox"/> The same</p>
<p>6. For this recent interaction, how many days elapsed between the time you submitted your correspondence or amended return and the time you received a reply?</p> <p><input type="checkbox"/> Less than 15 days <input type="checkbox"/> 15-29 days <input type="checkbox"/> 30-44 days <input type="checkbox"/> 45-60 days <input type="checkbox"/> Over 60 days <input type="checkbox"/> Did not receive a reply</p>	<p>9. How many days did it take to resolve your issue from the time you contacted or were contacted by , the IRS about this issue?</p> <p><input type="checkbox"/> Less than 15 days <input type="checkbox"/> 15-29 days <input type="checkbox"/> 30-44 days <input type="checkbox"/> 45-60 days <input type="checkbox"/> Over 60 days</p>
<p>7. What is a reasonable time frame to wait for the IRS to respond to your issue?</p> <p><input type="checkbox"/> Less than 15 days <input type="checkbox"/> 15-29 days <input type="checkbox"/> 30-44 days <input type="checkbox"/> 45-60 days <input type="checkbox"/> Over 60 days</p>	<p>10. Did you.....?</p> <p><input type="checkbox"/> Use a tax professional to assist you with resolving this issue <input type="checkbox"/> Represent yourself <input type="checkbox"/> Other</p>
<p>8. What your issue with the IRS completely resolved?</p> <p><input type="checkbox"/> Yes (Skip to question 9) <input type="checkbox"/> No (Skip to question 10) <input type="checkbox"/> Not sure (Skip to question 10)</p>	<p>11. Please mark the topic that best describes your main issue.</p> <p><input type="checkbox"/> Status of refund</p>

	<input type="checkbox"/> Status of payment <input type="checkbox"/> Penalty/Interest charges <input type="checkbox"/> Earned income credit <input type="checkbox"/> Exemptions/Dependents <input type="checkbox"/> Name/Address changes <input type="checkbox"/> Credits (child care, education, etc.) <input type="checkbox"/> Other changes to original return <input type="checkbox"/> Other
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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). Your information will not be shared with the IRS and will be used only for the purpose of survey research.

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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**.

12. Use this space for comments or suggestions for improvement.

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:V 1111 Constitution Ave. NW, Washington, DC 20224

OMB #1545-1432

I need your help with an important initiative I am undertaking to improve our service to America's taxpayers. I want to get feedback from taxpayers like you who have had correspondence with the IRS regarding their tax return or who have filed an amended return.

In a few days, you will receive a questionnaire asking your opinions about resolving such issues with the IRS. Please direct it to the person who had the most contact with the IRS on this matter. The questionnaire should take less than 5 minutes to complete. Your answers will be combined with others to give us an evaluation of customer satisfaction with IRS service.

To keep all replies anonymous to the IRS, we have asked an independent research company to administer the survey. Pacific Consulting Group/Scantron employees will process the questionnaires and report only statistical totals to us.

I am committed to improving IRS service to every taxpayer. Please help me in this

Jane Looney
Director, Accounts Management
Wage and Investment Division

effort by completing and returning the questionnaire as soon as possible. If you do not receive a questionnaire, please contact the Survey Helpline at 1-866-960-7897.

Thank you in advance for your cooperation.

Sincerely,



**Thank you for completing the survey. Please return the questionnaire to
P.O. Box 64530, St. Paul, MN 55164-9610 USA.**

Pacific Consulting Group/Scantron

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

A few days ago, you received a letter from Jane Looney, Director, Accounts Management, Wage and Investment Division, asking for your help with an important research project.

We are administering a nationwide survey among people who have had contact with the Internal Revenue Service (IRS). We want to know your opinions about the process of corresponding with the IRS regarding your tax return or filing an amended return. Your responses are critical to the accuracy of this research.

We are sending questionnaires to a random sample of taxpayers who have had such issues. All responses will be anonymous to the IRS, and your participation is voluntary. We will group your responses with others, so that no individual reply can be traced back to an individual.

The questionnaire is quite brief and should take less than 5 minutes to complete. Please use the postage-paid reply envelope to return your completed questionnaire. If you have any questions about this survey, please feel free to call the Survey Helpline at 1-866-960-7897.

The IRS is committed to improving its performance and service to the American public. A first step in this process is to gather reliable information from those who have had contact with IRS services and employees. Your honest opinions will help bring about these changes.

Thank you in advance for your cooperation.

Sincerely,



Dr. Peter Webb

OMB #1545-1432

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Project Director

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A few days ago, you received a letter from Jane Looney, Director, Accounts Management, Wage and Investment Division, asking for your help with an important research project. So far, we have not received your completed questionnaire. If you have not already done so, please take a few minutes to fill in your responses.

We are administering a nationwide survey among people who have had contact with the Internal Revenue Service (IRS). We want to know your opinions about the process of corresponding with the IRS regarding your tax return or filing an amended return. Your responses are critical to the accuracy of this research.

We are sending questionnaires to a random sample of taxpayers who have had such issues. All responses will be anonymous to the IRS, and your participation is voluntary. We will group your responses with others, so that no individual reply can be traced back to an individual.

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Thank you in advance for your cooperation.

Sincerely,

A handwritten signature in cursive script that reads "Peter Wehb". The signature is written in black ink and is positioned above the printed name.

Dr. Peter Wehb