

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 received a notice from the IRS pointing out a discrepancy between the earnings information reported on their tax return and the information provided to us by organizations such as banks and employers. In a few days, you will receive a questionnaire asking your opinions about the process of resolving such discrepancies 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. Fors Marsh Group 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 effort by completing and returning the questionnaire as soon as possible. If you do not receive a questionnaire, please contact the Survey Helpline at 1-800-XXX-XXX.

Sincerely,

C. Sherwood
Director, Campus Compliance Services

L1_13257-C

Fors Marsh Group
IRS Customer Survey
PO Box 42047
Arlington, VA 22204-9047

A few days ago, you received a letter from C. Sherwood, Director, Campus Compliance Services, 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 resolving a discrepancy between the earnings information reported on your tax return and information provided to the IRS by organizations such as banks and employers. Your responses are critical to the accuracy of this research.

We are sending questionnaires to a random sample of taxpayers who have had such discrepancies. 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 any one person.

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 1-800-XXX-XXXX.

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 this improvement.

Sincerely,

Brian K. Griepentrog, Ph.D.
Project Director

L2_13257-C

**IRS Small Business/Self-Employed
Customer Satisfaction Survey
Automated Underreporter (AUR)**

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 any questions about this survey, you may call the Survey Helpline at 1-800-XXX-XXXX.

The questions that follow ask your opinion regarding the discrepancy that was highlighted on your tax return. For each question, *regardless of whether you agree or disagree with the final outcome*, please indicate your answer by checking the box that best represents your opinion.

[Grid Question]

[Instructions for Q1a-Q1l]

How would you rate the...

- Q1a.** Length of time it took to hear from the IRS that you had a discrepancy?
- Q1b.** Ease of understanding the form notifying you of the discrepancy?
- Q1c.** Ease of understanding the exact amount owed?
- Q1d.** Accuracy of the discrepancy amount?
- Q1e.** Completeness of information about the discrepancy?
- Q1f.** Completeness of instructions for resolving the discrepancy?
- Q1g.** Flexibility in resolving the discrepancy?
- Q1h.** Length of time the IRS took to respond to you?
- Q1i.** Ease of understanding the documents explaining action taken on your account?
- Q1j.** Length of time it took to resolve the discrepancy?
- Q1k.** Notification of case closure?
- Q1l.** Fairness of how you were treated by the IRS?

[Response options for Q1a – Q1l]

Very Dissatisfied	05
Dissatisfied	04
Neither Satisfied nor Dissatisfied	03
Satisfied	02
Very Satisfied	01

- Q2.** Did you call the phone number listed in the AUR discrepancy notice?

Yes	01
No	02

[If Q2= 'Yes' (01), continue to Q2a – Q2c. If Q2= 'No' (02) or REF (-99), skip to Q3]

[Grid Question]

[Instructions for Q2a-Q2c]

How would you rate the ...

- Q2a.** Usefulness of the automated telephone system?
Q2b. Length of time it took you to get through to an IRS employee?
Q2c. Completeness of information you received during this call?

[Response options for Q2a – Q2c]

Very Dissatisfied	05
Dissatisfied	04
Neither Satisfied nor Dissatisfied	03
Satisfied	02
Very Satisfied	01

- Q3.** What is the primary reason that you called the phone number listed in the AUR discrepancy notice?
 (Mark one response only)

To receive an explanation of the notice	01
To receive general information (e.g., forms, status of case, etc.)	02
To receive answers to my other questions concerning my case	03
To give the IRS additional information	04
To request an extension of time to respond	05
Other	06

- Q4.** Were you able to reach a representative when you called the phone number listed in the AUR discrepancy notice?

Yes	01
No	02

[If Q4= 'Yes' (01), continue to Q4a – Q4d. If Q4= 'No' (02) or REF (-99), skip to Q5]

[Grid Question]

[Instructions for Q4a-Q4d]

How would you rate the ...

- Q4a.** Length of time to complete your call once you got through?
Q4b. Courtesy of the IRS representative?
Q4c. Knowledge of the IRS representative?
Q4d. Ability of the IRS representative to assist you in resolving your issue?

[Response options for Q4a – Q4d]

Very Dissatisfied	05
Dissatisfied	04
Neither Satisfied nor Dissatisfied	03
Satisfied	02
Very Satisfied	01

Q5. Regardless of whether you agree or disagree with the final outcome, how would you rate your overall satisfaction with the way your tax return discrepancy was handled?

- Very Dissatisfied 05
- Dissatisfied 04
- Neither Satisfied nor Dissatisfied 03
- Satisfied 02
- Very Satisfied 01

Q6. Were you provided with documents explaining the actions taken on your account?

- Yes 01
- No 02

Q7. Did you expect to receive documents explaining the actions taken on your account?

- Yes 01
- No 02

Q8. Did you ... ?

- Use a tax professional to assist you with resolving this discrepancy 01
- Represent yourself in resolving this discrepancy 02
- Both 03

[Instructions for Q9a – Q9e]

If you had questions regarding your discrepancy, what method of contacting the IRS would you prefer? Please rank the following methods in order of preference from 1st to 5th, with 1st being the highest preference and 5th being the lowest preference.

(Mark only one preference for each contact method.)

	Highest Preference		Lowest Preference		
	1 st	2 nd	3 rd	4 th	5 th
Q9a. Mail	01	02	03	04	04
Q9b. Phone	01	02	03	04	04
Q9c. In person	01	02	03	04	04
Q9d. Fax	01	02	03	04	04
Q9e. E-mail	01	02	03	04	04

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). This information will not be shared with the IRS and will be used only for the purpose of survey research.

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.

Q10. Use this space for comments of suggestions for improvement.

[Open ended response]

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 42047, Arlington, VA 22204-9047 USA.**

Do We Have Your Input Yet?

Recently, you received a questionnaire asking your opinions about the service you received from the IRS in a recent contact. 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 call us at 1-800-XXX-XXXX.

Brian K. Griepentrog, Ph.D.
Project Director

L3_13257-C

POSTCARD RETURN ADDRESS

Fors Marsh Group
IRS Customer Survey
PO Box 42047
Arlington, VA 22204-9047

Permit No. 200

Fors Marsh Group
IRS Customer Survey
PO Box 42047
Arlington, VA 22204-9047

A few days ago, you received a letter from C. Sherwood, Director, Campus Compliance Services, asking for your help with an important research project. If you have already completed the survey, thank you. 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 resolving a discrepancy between the earnings information reported on tax returns and information provided to the IRS by organizations such as banks and employers. Your responses are critical to the accuracy of this research.

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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 this improvement.

Thank you in advance for your cooperation.

Sincerely,

Brian K. Griepentrog, Ph.D.
Project Director

L4_13257-C