

Compliance Virtual Service Delivery Survey (3-6-13)

Thank you for participating in the Compliance Virtual Service Delivery Project. Your feedback will be used to help us provide quality service for this and future video projects. This survey is completely voluntary and should take less than 5 minutes to complete.

1. Please select the option that best describes you in relation to this return/case?
 The Taxpayer Power of Attorney (POA) responding on behalf of the taxpayer

2. Please indicate your satisfaction with the following

	Very Dissatisfied			Very Satisfied	
Picture quality	(1)	(2)	(3)	(4)	(5)
Audio quality	(1)	(2)	(3)	(4)	(5)
The flow of communication	(1)	(2)	(3)	(4)	(5)
Privacy of communication	(1)	(2)	(3)	(4)	(5)
Ability to share documents	(1)	(2)	(3)	(4)	(5)
Overall satisfaction with video assistance provided	(1)	(2)	(3)	(4)	(5)
Promptness of service	(1)	(2)	(3)	(4)	(5)
Courtesy of representative	(1)	(2)	(3)	(4)	(5)
Professionalism of representative	(1)	(2)	(3)	(4)	(5)
Representative willingness to help with your issue	(1)	(2)	(3)	(4)	(5)
Knowledge of representative	(1)	(2)	(3)	(4)	(5)
How clearly IRS representative explained issue	(1)	(2)	(3)	(4)	(5)
How well IRS representative listened to concerns	(1)	(2)	(3)	(4)	(5)
How well IRS representative explained why documents were or were not accepted	(1)	(2)	(3)	(4)	(5)
How clearly IRS representative explained next steps	(1)	(2)	(3)	(4)	(5)
Length on time to complete video conference	(1)	(2)	(3)	(4)	(5)
Overall satisfaction with today's service	(1)	(2)	(3)	(4)	(5)

3. Were you aware that you would be receiving service through video conferencing?
 Yes No
4. How well did the person setting your appointment prepare you for your video conference appointment?
 Very Poorly Poorly Average Well Very Well

What else could the person setting the appointment do to help prepare you for the appointment?

5. Did you bring the right documents with you to the appointment?
 Yes No

If you answered no, what else did you need to bring?

6. What is the main reason you chose to interact with the IRS through the video conference appointment?
(Please select ONLY one)
- Convenience of location Ease of explaining and providing documentation to the IRS
 Faster issue resolution Able to talk to someone face to face through video
 Did not think I had another option Other (please specify): _____

7. Did you receive the assistance needed to resolve your audit during the video conference today?
 Yes No Not sure

If you answered “no” or “not sure” what is your next step? (Please select ONLY one)

- Provide additional document/s Not sure
 Review information being sent to me Other (please specify) _____
 Expect refund to be issued

8. If offered to you, would you be willing to use video conferencing again?
 Yes No

9. Approximately, how long did it take you to travel to this location?
 15 minutes or less 31 to 45 minutes More than 60 minutes
 16 to 30 minutes 46 to 60 minutes

10. What category best describes your total income last year?
 \$15,000 or less \$35,001 to \$50,000 \$100,001 or more
 \$15,001 to \$25,000 \$50,001 to \$75,000 Decline to answer
 \$25,001 to \$35,000 \$75,001 to \$100,000

11. Do you have any of the following long-lasting conditions? (Please select all that apply)
- Severe vision impairment
 Severe hearing impairment
 A condition that substantially limits physical abilities (such as walking or reaching)
 A condition that limits learning or remembering
 I do not have any of the above long-lasting conditions

12. What category describes your current age?
 18 to 24 years 45 to 54 years 75 to 84 years
 25 to 34 years 55 to 64 years 85 years and over
 35 to 44 years 65 to 74 years Decline to answer

13. Please provide any comments or suggestions you may have regarding the Virtual Service Delivery you experienced today, including your opinions on how video conferencing compares to in-person assistance.

Thank you for completing this survey. Your feedback will be used to help improve our service utilizing video conferencing in the future.

Privacy Statement

The authority requesting the information is 5 USC 301. The primary purpose of asking for the information is to determine steps IRS can take to improve our service to you. The information may be disclosed as authorized by the routine uses published for the Privacy Act System of Records entitled, Treas/IRS 00.001 Correspondence Files, including Stakeholder Partnership File, and Correspondence Control Files, as published in the Federal Register: December 10, 2001 (Volume 66, Number 237)] [Notices] pages 63785-6. Providing the information is voluntary. Not answering some or all of the questions will not affect you.

Paperwork Reduction Act Notice

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests along with the address where you can send comments regarding this study. The OMB number for this study is 1545-1432. If you have any comments regarding this study, please write to: IRS Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Avenue, NW, Washington, DC 20224

Prenote Letter (Wave 1)

Dear

We need your help with an important initiative we are undertaking to improve our service to America's taxpayers. We want to get feedback from taxpayers like you who have recently Virtual Service Delivery at an Internal Revenue Service (IRS) Taxpayer Assistance Center (TAC).

In a few days, you will receive a questionnaire asking your opinions about the service you received from the IRS. Please give this questionnaire to the person in your household who scheduled the appointment and received video assistance. Answering these questions should take less than 5 minutes. Your answers will be combined with responses from other taxpayers to help measure taxpayer satisfaction with IRS service.

All replies will be anonymous to the IRS. Employees will process the questionnaires and only report compiled information.

We are committed to improving IRS service to every taxpayer. Please help us in this effort by completing and returning the questionnaire as soon as possible.

Thank you in advance for your cooperation.

Sincerely,

David Alito
Director, Compliance
Wage and Investment Division

Denice D. Vaughan
Director, Campus Compliance Services
Small Business/Self Employed Division

Cover Letter (Wave 2)

Dear

A few days ago, you received a letter from David Alito, Director, Compliance, Wage and Investment Division, and Denice D. Vaughan, Director, Campus Compliance Services, Small Business/Self-Employed Division, asking for your help with an important research project.

We are administering a survey among people who have had contact with the Internal Revenue Service (IRS). We want to know your opinions regarding the virtual service you received. Your responses are critical to the accuracy of this research. If any other person was primarily responsible for dealing with the IRS on this matter, please give the questionnaire to that person and encourage him or her to respond.

The IRS will hold your identity anonymous. Your answers will be grouped with others, so that no individual reply can be traced back to a person or case number.

This brief survey should take less than 5 minutes to complete. We have included a postage-paid reply envelope for you to return your completed survey.

To verify the authenticity of this survey, please visit [IRS.gov](https://www.irs.gov) and enter the search term “customer satisfaction surveys”. The IRS Customer Satisfaction Survey page contains a list of valid and current IRS surveys and will refer to this survey as the *W&I or SB/SE, Compliance Virtual Service Delivery, Mail survey*.

Thank you in advance for your participation.

Sincerely,

Kathleen Holland
Project Director

Postcard Reminder (Wave 3)

W&I Research and Analysis
IRS Surveys
401 W. Peachtree St
Atlanta, GA 30308

Do We Have Your Input Yet?

Recently, you received a questionnaire asking your opinions about the service you received from the IRS. If you have already completed and returned the questionnaire, please accept our sincere thanks. If not, please take a few minutes to complete and return it today. We want to be sure we have your opinions and suggestions for improving the IRS's service to the public.

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Kathleen Holland
Project Director

Cover Letter for Non-Respondents (Wave 4)

Dear

Recently you received a letter requesting your feedback about your virtual service experience during a recent. So far, we have not received your completed survey. If you have already completed and returned the survey, thank you. If you have not completed the survey questions, please take a few minutes to fill in your responses. If another person was primarily responsible for dealing with the Internal Revenue Service (IRS) on this matter, please give the questionnaire to that person and encourage him or her to respond.

As described in our previous communication, we are administering a survey among people who have had contact with the Internal Revenue Service (IRS). Your name was selected for this survey because we want to know your opinions regarding the virtual service you received. Your responses are critical to the accurate evaluation of the IRS's service.

The IRS will hold your identity anonymous. Your answers will be grouped with others, so that no individual reply can be traced back to a person or case number. Your participation is voluntary.

The survey should take less than 5 minutes to complete. We have included a postage-paid reply envelope for you to return your completed questionnaire.

To verify the authenticity of this survey, please visit [IRS.gov](https://www.irs.gov) and enter the search term "customer satisfaction surveys". The IRS Customer Satisfaction Survey page contains a list of valid and current IRS surveys and will refer to this survey as the *W&I or SB/SE, Compliance Virtual Service Delivery, Mail survey*.

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 employees and services. Your honest opinions will help bring about this improvement.

Thank you in advance for your participation.

Sincerely,

Kathleen Holland
Project Director