

Field Collection Prenotification Letter

Dear

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 worked with an assigned revenue officer to resolve a tax issue.

In a few days, you will receive a questionnaire asking your opinions about the contact you had with an assigned IRS revenue officer. 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 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.

Sincerely,
Robert L. Hunt
Director, Collection Division

L1_13257-D

Field Collection Cover Letter

Dear

A few days ago, you received a letter from Robert L. Hunt, Director, Collection 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 resolving a tax issue with an assigned revenue officer. 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 1-866-960-7897.

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 this improvement.

Sincerely,

Dr. Peter Webb
Project Director
Pacific Consulting Group

L2_13257-D

Field Collection Questionnaire



COLLECTION 326071 777620 607

OMB # 1545-1432

IRS SMALL BUSINESS/SELF-EMPLOYED CUSTOMER SATISFACTION SURVEY COLLECTION

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 1-866-960-7897.

We want to ask you very specifically about the contacts you had with a Collection revenue officer—not about all of your contacts with the IRS.

- 1** The questions that follow ask your opinion regarding your experience working with the revenue officer assigned to your case from our local IRS office. For each question, regardless of whether you agree or disagree with the final case outcome, please indicate your answer by checking the box that best represents your opinion.

Again, focusing on your experience working with the revenue officer assigned to your case from the local IRS office, how satisfied are you with:	Neither Satisfied				
	Very Dissatisfied	Somewhat Dissatisfied	Not Dissatisfied	Somewhat Satisfied	Very Satisfied
a. Ease of understanding correspondence from your assigned revenue officer?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Ease of contacting your assigned revenue officer?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Amount of time your revenue officer took to respond to you?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. Courtesy and professionalism of your assigned revenue officer?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e. Explanation of the collection process by your revenue officer?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f. Explanation of what would happen if you did not comply?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g. Acknowledging receipt of the information you submitted?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
h. Consideration given to the information you submitted?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
i. Explanation of payment options that may be available to you?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
j. Flexibility of your revenue officer in resolving the issue?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
k. Keeping you up-to-date on your field collection process?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
l. Notifying you of case closure?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
m. Amount of time you had to spend on this collection issue?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
n. Fairness of treatment by your revenue officer?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 2** Regardless of whether you agree or disagree with the final case outcome, how would you rate your overall satisfaction with your experience working with the revenue officer assigned to your case from the local IRS office?
- | Neither Satisfied | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Very Dissatisfied | Somewhat Dissatisfied | Not Dissatisfied | Somewhat Satisfied | Very Satisfied |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

- 3** How many IRS revenue officers contacted you regarding this case?
- None 1 2 3 4 5 6 or more Don't remember

- 4** Are you ...?
- The taxpayer
- A tax professional who represented the taxpayer (Skip to box after question 7)
- Someone else who represented the taxpayer (Skip to box after question 7)

Please continue on back

Field Collection Questionnaire

- 5** If you are the taxpayer, did you use a tax professional to assist you in handling your Collection case with the IRS?
- Yes
 - No
 - Don't recall

- 6** Whom did you rely on most for information regarding the status of your Collection case?
- Your tax professional
 - Your IRS revenue officer (Skip to box after question 7)
 - Other (Skip to box after question 7)

- 7** How satisfied are you with your tax professional keeping you up-to-date on your field collection process?
- | Very Dissatisfied | Somewhat Dissatisfied | Neither Satisfied / Not Satisfied | Somewhat Satisfied | Very Satisfied |
|--------------------------|--------------------------|-----------------------------------|--------------------------|--------------------------|
| ▼ | ▼ | ▼ | ▼ | ▼ |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

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.

- 8** 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 estimate 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:TSP; 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.

Field Collection Postcard Reminder

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 1-866-960-7897.

Dr. Peter Webb
Project Director
Pacific Consulting Group

L3_13257-D

Field Collection Cover Letter for Non-Respondents

Dear

A few days ago, you received a letter from Robert L. Hunt, Director, Collection Division, 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 tax issue with an assigned revenue officer. 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 1-866-960-7897.

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 this improvement.

Thank you in advance for your cooperation.

Sincerely,

Dr. Peter Webb
Project Director
Pacific Consulting Group

L4_13257-D