

Excise Tax 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 recently experienced an audit of their excise tax returns, or a review of their Form 637, *Application for Registration (For Certain Tax Activities)*.

In a few days, you will receive a questionnaire asking your opinions about the audit 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 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,

John H. Imhoff, Jr.
Director, Specialty Programs

L1_13257-L

Excise Tax Cover Letter

Dear

A few days ago, you received a letter from John H. Imhoff, Jr., Director, Specialty Programs, 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 your recent experience with the IRS audit of your excise tax return, or review of your Form 637, *Application for Registration (For Certain Excise Tax Activities)*. Your responses are critical to the accuracy of this research.

We are sending questionnaires to all taxpayers who have gone through a recent examination of an excise tax return. All responses will be anonymous to the IRS, and your participation is voluntary. We will group your responses with all the others we receive, 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.

To verify the authenticity of this survey, please visit IRS.gov and enter the search term “customer surveys.” The IRS Customer Satisfaction Survey page contains a list of valid and current IRS surveys and as of this issuance should provide a reference to SB/SE Excise Tax Examination.

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-L

Excise Tax Questionnaire

Internal Revenue Service (IRS) Customer Satisfaction Survey

OMB # 1545-1432

Excise Tax Audit or Registration Review

The IRS is trying to improve its service to the public. You can help in this important mission by providing your feedback below. This voluntary survey should take less than 5 minutes to complete. Your identity will not be provided to the IRS. If you have any questions about this survey, you may call the Survey Helpline at 1-866-960-7897.

The following questions ask your opinion regarding how the IRS handled your most recent Excise Tax audit or Form 637 registration review. For each question, *regardless of whether you agree or disagree with the final outcome*, please mark the circle that best represents your opinion. Please answer the sections relevant to your situation. If a question does not apply to you, please mark "Not Applicable."

1 Initial Registration Process

Only answer if you submitted an initial application for a 637 registration in the past year, otherwise skip to Question 2

How satisfied are you with the...	Very Dissatisfied	Somewhat Dissatisfied	Neither Satisfied nor Dissatisfied	Somewhat Satisfied	Very Satisfied	Don't Know/Not Applicable
a. Ease of filling out Form 637, Excise Tax Application for Registration.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Length of time it took from when you submitted your registration application to your first appointment with an auditor.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. Length of time it took from your first appointment with an auditor to when you received the letter of approval or denial.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

2 Excise Tax Audit or Registration Review Process

How satisfied are you with the...	Very Dissatisfied	Somewhat Dissatisfied	Neither Satisfied nor Dissatisfied	Somewhat Satisfied	Very Satisfied	Don't Know/Not Applicable
a. Initial information the IRS provided (e.g., letters/ notices, phone calls, IRS publications) so that you knew what to expect during the audit/review.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Explanation of what information you needed to provide.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. Flexibility of your auditor in scheduling meetings.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. Explanation your auditor gave you of why more information was requested after the initial appointment.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. Amount of time you were given to provide information.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
f. Consideration given to the information you provided....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
g. Explanation your auditor gave you of why the audit/ review expanded from the issues you were initially informed about.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
h. Auditor's professionalism.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
i. Auditor's tax knowledge.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
j. Auditor's understanding of your business.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
k. Time your auditor took to respond to your questions....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
l. Amount of time you personally had to spend on the entire audit/review process.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
m. IRS communication with you throughout the audit/ review process.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Excise Tax Questionnaire

2 Excise Tax Audit or Registration Review Process—continued

How satisfied are you with the...	Very Dissatisfied	Somewhat Dissatisfied	Neither Satisfied nor Dissatisfied	Somewhat Satisfied	Very Satisfied	Don't Know/Not Applicable
n. Length of audit/review process from start to finish.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
o. Explanation of the final decision for your audit/review including any changes made.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
p. Manager's effect on your audit/review, if you communicated with the manager.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
q. Fairness of treatment during the audit/review.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

3 Audit Process Only

Only answer if you completed an Excise Tax audit, otherwise skip to Question 4

How satisfied are you with the...	Very Dissatisfied	Somewhat Dissatisfied	Neither Satisfied nor Dissatisfied	Somewhat Satisfied	Very Satisfied	Don't Know/Not Applicable
a. Explanation the auditor provided as to the reason(s) for the audit.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Explanation of your payment options, if there was a change.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. Information provided to you on how to appeal the audit findings if you did not agree.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

4 Overall Satisfaction

Regardless of whether you agree or disagree with the final outcome, how would you rate your overall satisfaction with the way your audit or registration review was handled?.....	Very Dissatisfied	Somewhat Dissatisfied	Neither Satisfied nor Dissatisfied	Somewhat Satisfied	Very Satisfied	Don't Know/Not Applicable
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

5 Are you...

- The taxpayer
- A tax professional who represented the taxpayer
- Someone else who represented the taxpayer

6 If you are the taxpayer, did you...

- Use a tax professional to represent you for this audit/review
- Represent yourself
- Both

7 Please provide any comments or suggestions for improvement.

! 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.

Thank you for completing the survey.
Please return this questionnaire to P.O. Box 64530, St. Paul, MN 55164-0530

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:WCA:MP:TTSR, 1111 Constitution Ave. NW, Washington, DC 20224.

Excise Tax 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-L

Excise Tax Cover Letter for Non-Respondents

Dear

Recently you received a survey requesting your feedback about your experiences during a recent IRS audit of your excise tax return. So far, we have not received your completed survey. If you have not already completed the survey, please take a few minutes to fill in your responses. If another person was primarily responsible for dealing with the IRS on this matter, please direct the survey to that person and encourage him or her to respond.

As described in our previous communication, we are administering a nationwide survey among people who have had a recent IRS audit of an excise tax return, or review of your Form 637, *Application for Registration (For Certain Excise Tax Activities)*. We want to know your opinions regarding the audit process and the service you received. Your responses are critical to the accuracy of our evaluation of the IRS's service.

Pacific Consulting Group will hold your identity anonymous and will not provide any of your identifying information to the IRS. Your answers will be grouped with others, so that no individual reply can be traced back to a person or case number.

The survey should take less than 5 minutes to complete. We have included a postage-paid reply envelope for you to return your completed survey. If you have any questions or concerns, please feel free to contact the Survey Helpline at 1-866-960-7897.

To verify the authenticity of this survey, please visit IRS.gov and enter the search term "customer surveys." The IRS Customer Satisfaction Survey page contains a list of valid and current IRS surveys and as of this issuance should provide a reference to SB/SE Excise Tax Examination.

Thank you in advance for your cooperation. The IRS is committed to improving its performance and service to the American public. A vital 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 these changes.

Sincerely,
Dr. Peter Webb
Project Director
Pacific Consulting
Group

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