

# AUR Prenotification Letter

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 received a notice from the Internal Revenue Service (IRS) pointing out a possible discrepancy between the information reported on their tax return and the information provided to the IRS by organizations such as banks and employers.

In a few days, you will receive a survey asking your opinions about the process of resolving such discrepancies. Please give this survey to the person in your household who had the most contact with the IRS on this matter. 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.

The primary purpose for requesting this information is to help the IRS improve its service to taxpayers. Our authority for requesting the information is 5 USC and 26 USC 7801.

Providing information is voluntary. However, if you do not answer all or part of the survey questions, the IRS may lack information it could use to improve taxpayer service. The information you provide may be disclosed to an IRS contractor when authorized by law. The contractor is required to follow protections required by the Privacy Act and/or Internal Revenue Code section 6103.

We are committed to improving IRS service to every taxpayer. Please help us in this effort by completing and returning the survey as soon as possible. If you do not receive a survey within the next week, please contact the Survey Helpline at 1-888-260-0052.

Thank you in advance for your cooperation.

Sincerely,

James P. Clifford  
Director, Compliance  
Wage and Investment Division

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

L1\_14384

# AUR Cover Letter

Dear

A few days ago, you received a letter from James Clifford, 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.

ICF International is 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 possible discrepancy between the 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. If any other person was primarily responsible for dealing with the IRS on this matter, please give the survey to that person and encourage him or her to respond.

You may complete the survey either by mail or online. If you choose to complete it online, please enter the following internet address in your web browser: **[www.IRSurvey.com](http://www.IRSurvey.com)**

Once you access the website for the survey, you will be asked for a unique password. Please enter the password below:

**PASSWORD:**

The password will save any answers you've entered in the event of computer disruptions. ICF will not share your password with the IRS at any time during or after this study.

ICF 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.

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. If you have any questions or concerns, please feel free to contact ICF's Survey Helpline at 1-888-260-0052.

Thank you in advance for your participation.

Sincerely,

John Hurley  
Project Director  
ICF International

L2\_14384

# AUR Questionnaire



1234567890101

OMB# 1545-1432

## IRS CUSTOMER SATISFACTION SURVEY

In an effort to improve its services to the public, the IRS is seeking the opinions of taxpayers who received a notice from the IRS pointing out a possible discrepancy on their tax return. Please assist us by completing this brief voluntary survey, which should take less than 5 minutes of your time. ICF will keep your identity private to the extent permitted by law. If you have any questions about this survey, you may call the ICF Survey Helpline at 1-888-260-0052.

**1** Thinking of your experience with the process of resolving this possible discrepancy with the IRS, *regardless of whether you agreed or disagreed with the final outcome*, please mark the option that best represents your experiences throughout the resolution process.

Please rate your satisfaction with the following:

	Very Dissatisfied	Somewhat Dissatisfied	Neither Satisfied Nor Dissatisfied	Somewhat Satisfied	Very Satisfied	Don't Know/Not Applicable
a. Overall, the way the IRS handled your possible discrepancy.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. The length of time it took to hear from the IRS that you had a discrepancy.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. How well the initial IRS letter explained what the possible discrepancies were on your tax return.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. How clearly the initial IRS letter explained what documents you needed to send to the IRS.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. How well the IRS letter explained why we did (or did not) accept your documents/explanation.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
f. How well the IRS kept you informed of the status of your case.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
g. The consistency of information provided to you by the IRS throughout the process.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
h. How well the final IRS letter explained the resolution of your case.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
i. The length of the process to resolve your possible discrepancy from when you were notified until it was resolved.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**2** If you answered "Very Dissatisfied" or "Somewhat Dissatisfied" to any of the above questions, can you describe what caused you to feel that way?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**3** Did you call the IRS about your possible discrepancy using a telephone number listed on any of the letters?

- Yes (continue to 4)
- No (skip to 5)
- Don't recall (skip to 5)

**4** Regardless of the outcome of your case, how satisfied were you with the service you received on these calls?.....

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** During the process to resolve your possible discrepancy, approximately how many times did you contact the IRS? (Please enter zero if you did not contact the IRS by this method.)

Mail → \_\_\_ Times      Telephone → \_\_\_ Times      Fax → \_\_\_ Times

**6** When you were first notified of the possible discrepancy, how many months did you expect it would take to resolve?

\_\_\_ Months

*Please continue on back*

# AUR Questionnaire

**7** Was the actual amount of time...?

- Shorter than you expected
- About equal to your expectations
- Longer than you expected

**8** How much do you agree with the following statements?

Statements	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	NA
a. I received an adequate description of the process to resolve my possible discrepancy.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. My experience reflected the described process.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. I had the opportunity to provide information important to my case.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. I was treated with respect during the process.....	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**9** Overall, how well did the IRS meet your expectations while handling the possible discrepancy?

- Much better than expected
- Better than expected
- As expected
- Worse than expected
- Much worse than expected

**↳** If you answered "Worse than expected" or "Much worse than expected" to the above question, can you describe what caused you to feel that way?

---



---

**10** Who prepared your taxes? (Mark only one.)

- You
- Professional tax preparer
- Friend or relative
- IRS service representative at an IRS office
- Volunteer (at a volunteer tax preparation location)
- Other

**11** Who was involved in resolving this discrepancy?

- a. A tax professional assisted me  Yes  No
- b. I represented myself  Yes  No

**12** The IRS continually looks for ways to improve its service to taxpayers who have received a notice pointing out a possible discrepancy on their tax return. Please use this space to provide your comments or suggestions for improvement. We welcome your feedback.

---



---



Occasionally, the IRS asks ICF to conduct additional in-depth research on tax-related issues. 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 e-mail address (if available). This information will not be shared with the IRS and will be used only for the purpose of this research. If you have any questions about this, please contact the ICF Survey Helpline at 1-888-260-0052.

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.

**Paperwork Reduction Act Notice**

The Paperwork Reduction Act requires that the IRS display an Office of Management and Budget (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 this survey to ICF Business Operations Center, IRS Surveys, 980 Beaver Creek Drive, Martinsville, VA 24112-2177.

# AUR Post Card Reminder

## Do We Have Your Input Yet?

Recently, you received a survey asking your opinions about the service you received from the IRS. If you have already completed and returned the survey, 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.

If you did not receive the survey, or it has been misplaced, please call us at 1-888-260-0052.

John Hurley  
Project Director  
ICF International

L3\_14384

OMB# 1545-1432

## IRS CUSTOMER SATISFACTION SURVEY

The IRS is trying to improve its service to the public. You can help in this important mission by answering the questions that follow. 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.

### 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.

Next

# AUR Cover Letter for Non-Respondents

Dear

Recently you received a letter requesting your help with an important research project. So far, we have not received your completed survey. If you have already completed and returned the survey questions, thank you. If you have not completed the survey, 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 survey to that person and encourage him or her to respond.

As described in our previous communication, ICF International is administering a nationwide survey among people who have had contact with the IRS. We want to know your opinions about the process of resolving a possible discrepancy between the 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 accurate evaluation of the IRS's service.

You may complete the survey either by mail or online. If you choose to complete it online, please enter the following internet address in your web browser: **[www.IRSsurvey.com](http://www.IRSsurvey.com)**

Once you access the website for the survey, you will be asked for a unique password. Please enter the password below:

**PASSWORD:**

The password will save any answers you've entered in the event of computer disruptions. ICF will not share your password with the IRS at any time during or after this study.

ICF 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. 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 survey. If you have any questions or concerns, please feel free to contact ICF's Survey Helpline at 1-888-260-0052.

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,

John Hurley  
Project Director  
ICF International

L4\_14384