

# Wave 1

(Prenote Letter from Director, CCS)

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 been identified as victims of identity theft by the Internal Revenue Service (IRS).

In a few days, you will receive a survey from our contractor, Fors Marsh Group (FMG), asking your opinions about the service you received from the IRS. 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 to the extent allowed by law protections required by the Privacy Act and/or Internal Revenue Code section 6103.

I am committed to improving IRS service to every taxpayer. Please help me 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 FMG's Survey Helpline at **1-800-521-7177** or email [irssurveyhelp@forsmarshgroup.com](mailto:irssurveyhelp@forsmarshgroup.com).

Thank you in advance for your cooperation.

Sincerely,

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

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## Wave 2

(Cover Letter from Contractor... includes survey questionnaire)

Dear

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

Fors Marsh Group (FMG) is administering a nationwide survey among people who have had contact with the Internal Revenue Service (IRS). We want to know your opinions regarding your identity theft issue and the 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 survey to that person and encourage him or her to respond.

FMG 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 FMG's Survey Helpline at 1-800-521-7177 or [email irssurveyhelp@forsmarshgroup.com](mailto:irssurveyhelp@forsmarshgroup.com).

Thank you in advance for your cooperation.

Sincerely,

Brian K. Griepentrog, Ph. D.  
Director of Research  
Fors Marsh Group LLC

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## Wave 2

(Cover Letter from Contractor... includes survey questionnaire)

OMB# 1545-2250

### **ID THEFT SURVEY Questions**

Q1. Did you or the IRS initiate contact regarding your Identity Theft case?

- I self-identified as an Identity Theft victim, and I initiated contact with the IRS about my tax issue.
- The IRS identified me as an Identity Theft victim, and the IRS initiated contact with me about my tax account.
- The IRS contacted me about a tax issue and I responded that I was a victim of Identity Theft.

**Please rate your satisfaction with the following:**

Q2. Overall, the way the IRS handled your Identity Theft case

- Very dissatisfied (1)
- Dissatisfied (2)
- Neither dissatisfied nor satisfied (3)
- Satisfied (4)
- Very satisfied (5)

Q3. How well the information provided by the IRS enabled you to understand what was needed to resolve your Identity Theft issue

- Very dissatisfied (1)
- Dissatisfied (2)
- Neither dissatisfied nor satisfied (3)
- Satisfied (4)
- Very satisfied (5)

Q4. How well the IRS kept you informed on the status of your Identity Theft issue

- Very dissatisfied (1)
- Dissatisfied (2)
- Neither dissatisfied nor satisfied (3)
- Satisfied (4)
- Very satisfied (5)

## Wave 2

(Cover Letter from Contractor... includes survey questionnaire)

Q5. The consistency of the information provided throughout the Identity Theft process

- Very dissatisfied (1)
- Dissatisfied (2)
- Neither dissatisfied nor satisfied (3)
- Satisfied (4)
- Very satisfied (5)

Q6. The ease of completing IRS Form 14039, Identity Theft Affidavit

- Very dissatisfied (1)
- Dissatisfied (2)
- Neither dissatisfied nor satisfied (3)
- Satisfied (4)
- Very satisfied (5)
- I did not fill out an IRS Form 14039 (9)

Q7. The length of time it took to resolve your tax-related Identity Theft issue

- Very dissatisfied (1)
- Dissatisfied (2)
- Neither dissatisfied nor satisfied (3)
- Satisfied (4)
- Very satisfied (5)

Q8. How many times did you provide information (by either phone, mail, fax, or office visit) to IRS about your Identity Theft issue? (Please indicate the number of times contacted for each method below, where applicable).

- By Phone? (0) (1) (2) (3) (more than 3)
- By Mail? (0) (1) (2) (3) (more than 3)
- By Fax? (0) (1) (2) (3) (more than 3)
- By Office Visit? (0) (1) (2) (3) (more than 3)

Q9. Were you provided with a direct contact name and telephone number of an IRS Representative throughout the course of your Identity Theft issue?

- Yes (proceed to Q10)
- No (proceed to Q13)

## Wave 2

(Cover Letter from Contractor... includes survey questionnaire)

**Please rate your satisfaction with the following:**

Q10. The availability of the IRS Representative who handled your Identity Theft issue

- Very dissatisfied (1)
- Dissatisfied (2)
- Neither dissatisfied nor satisfied (3)
- Satisfied (4)
- Very satisfied (5)

Q11. How expeditiously the IRS Representative handled your Identity Theft issue

- Very dissatisfied (1)
- Dissatisfied (2)
- Neither dissatisfied nor satisfied (3)
- Satisfied (4)
- Very satisfied (5)

Q12. The ability of the IRS Representative to guide you through the process of resolving your Identity Theft issue

- Very dissatisfied (1)
- Dissatisfied (2)
- Neither dissatisfied nor satisfied (3)
- Satisfied (4)
- Very satisfied (5)

Q13. The IRS continually looks for ways to improve its service to taxpayers. Please use this space to provide your comments or suggestions for improvement. We welcome your feedback.

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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 1545-1349. 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.

# Wave 3

(Postcard Reminder from Contractor)

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## 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 have not responded to the survey, we will be sending one more copy of the survey in case you did not receive the first one or it has been misplaced. If you have any questions or concerns about this survey, please contact us at 1-800-521-7177 or email [irssurveyhelp@forsmarshgroup.com](mailto:irssurveyhelp@forsmarshgroup.com).

Brian K. Griepentrog, Ph. D.  
Director of Research  
Fors Marsh Group LLC

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## Wave 4

(Non-Respondent Cover Letter from Contractor... includes survey questionnaire)

Dear

Recently you received a letter requesting your feedback about your experiences during your recent identity theft issue. 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, Fors Marsh Group (FMG) is administering a nationwide survey among people who recently dealt with an identity theft issue. Your name was selected for this survey through a random sample of those who were identified as identity theft victims. We want to know your opinions regarding the identity theft process and the service you received from the IRS. Your responses are critical to the accurate evaluation of the IRS's service.

FMG 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 FMG's Survey Helpline at 1-800-521-7177 or email [irssurveyhelp@forsmarshgroup.com](mailto:irssurveyhelp@forsmarshgroup.com).

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,

Brian K. Griepentrog, Ph. D.  
Director of Research  
Fors Marsh Group LLC

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