

# 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 received a notice informing you of a balance due or return delinquency on your tax return..

In a few days, you will receive a questionnaire asking your opinions about the collection process 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 1-800-960-7897.

Sincerely,  
Denice D. Vaughan  
Director, Campus Compliance Services

L1\_13257-A

# Cover Letter

Dear

A few days ago, you received a letter from Denice D. Vaughan, Director, Campus Compliance Services, asking for your help with an important research project.

We are administering a nationwide survey of people who have had contact with the Internal Revenue Service (IRS). We want to know your opinions about the collection process you went through which began with a notice informing you of a balance due or a return delinquency. Your responses are critical to the accuracy of this research.

We are sending questionnaires to a random sample of taxpayers who have gone through the collection process on a recent tax return. 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.

To verify the authenticity of this survey, please visit [IRS.gov](http://IRS.gov) and enter the search term "customer surveys." The IRS Customer Satisfaction Survey page contains a list of valid, current and unexpired, IRS surveys and as of this issuance should provide a reference to SB/SE Compliance Services Collection Operation.

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

# Cover Letter

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# CSCO Questionnaire

## **IRS SMALL BUSINESS/SELF-EMPLOYED CUSTOMER SATISFACTION SURVEY COMPLIANCE SERVICES COLLECTION OPERATION**

**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.**

**The questions that follow ask your opinion regarding how the IRS handled your most recent collection process.**

**For each question, *regardless of whether you agree or disagree with the final outcome*, please indicate your answer by checking the box that best represents your opinion.**

***Please consider only the written notices you received from the IRS when answering the following questions.***

Please rate your satisfaction with the following:

(Where 1 is Very Dissatisfied, and 5 is Very Satisfied)

1. Overall, your satisfaction with the way your issue was handled by the Collection Operation. (Where 1 is Very Dissatisfied, and 5 is Very Satisfied)
2. Ease of understanding the initial notice/letter?
3. Length of time you were given to respond to the Collection Operation?
4. Ease of obtaining the information you needed from the IRS?
5. Correspondence from the IRS adequately addressing all of your issues?
6. Time given you to respond to the IRS?
7. Time the IRS took to respond to your written inquiry?
8. Length of the correspondence collection process, from when you first wrote to the IRS about this issue until it was resolved?
9. Explanation of the actions the IRS took to resolve your issue?
10. IRS keeping you informed of the status of your case?
11. Did you set up a payment plan? (if yes go to q11a; if no, go to Q12)
- 11a. How satisfied were you with the ease of setting up your payment plan?
12. Did you call the phone number listed on the letter from the Collection Operation? Yes; No  
(if "Yes" to q12; ask Q12a – 12d. Otherwise, skip to Q13.)

# CSCO Questionnaire

- 12a Using the same scale, with 1 being very dissatisfied and 5 being very satisfied, how satisfied are you with the: (INTERVIEWER, READ EACH ITEM)
- 12b Rate your satisfaction with the length of time it took you to get through to the Collection Operation employee?
- 12c Rate your satisfaction with the courtesy of the Collection Operation employee?
- 12d Usefulness of the information provided on the phone?
- 13 Did you ask for information from the Collection Operation, such as: income earned, forms, where to file, payment plans, payments received etc. Yes; No (if "Yes" to Q13, ask Q13a & 13b. Otherwise, skip to Q14)
- 13a Did you request this information by: [Multiple Response]? Telephone; Mail; Email; IRS Web site; Other (Specify)
- 13b When replying to your request for information, did the IRS respond within 45 days? Yes; No; Did not receive a reply
- 14 Was your issue resolved via phone contact or by mail? Phone; Mail; Not sure
- 15 Did you agree with the outcome of your case? Yes; No; Not sure
- 16 Did you: Use a tax professional to assist you with resolving this issue; Represent yourself in resolving this issue; Both?
- 17 Overall, how well did the IRS meet your expectations during your interaction with the collection operation? For Much better than expected, press 5 For Better than expected, press 4 For As expected, press 3 For Worse than expected, press 2 For Much worse than expected, press 1
- 18 Which statement best describes the reason(s) for your interaction with the Collection Operation. (select all that apply)
- A. I owed money because I didn't pay the balance due on my return(s) when I filed.
  - B. I owed money because the IRS adjusted my taxes.
  - C. I had unfiled return(s) that needed to be submitted
  - D. I wanted to set up a payment plan to pay my taxes.
  - E. I wanted to tell the IRS that I could not afford to pay my taxes
  - F. I needed information about income I had earned in order to file my tax returns
  - G. Other
- 19 What actions did you take to try to resolve your tax issue? (select all that apply)
- A. Called the IRS phone number listed in the IRS notice

# CSCO Questionnaire

- B. Called an IRS phone number, but not the one in the notice.
- C. Wrote a letter/letters to IRS
- D. Provided financial information to IRS in order to get a payment plan.
- E. Visited an IRS office
- F. Looked for information on IRS.gov on how to resolve my issue
- G. Other

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.

**Use this space for comments or suggestions for improvement.**

**Thank you for completing the survey.**

**Please return the questionnaire to P.O. Box 64530, St. Paul, MN 55164-9610 USA.**

**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.*

# Post Card 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

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# Cover Letter for Non-Respondents

Dear

A few days ago, you received a survey from Denice D. Vaughan, Director, Campus Compliance Services, 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 collection process you went through which began with a notice informing you of a balance due or a return delinquency. Your responses are critical to the accuracy of this research.

We are sending questionnaires to a random sample of taxpayers who have gone through the collection process on a recent tax return. 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.

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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



# Cover Letter for Non-Respondents

Project Director

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