

ATTACHMENT A: Information Collection Request

Wave 1 – Pre Notification Letter

DATE

ID#

FIRSTNAME LASTNAME

SAMPLE ADDRESS 1

SAMPLE ADDRESS 2

SAMPLE ADDRESS 3 POSTAL CODE

Dear FIRSTNAME LASTNAME:

My name is Toni Cross and I am the Director of Strategies and Solutions within the Wage & Investment Division of the Internal Revenue Service. I am asking for your help in improving the services the Internal Revenue Service (IRS) provides to taxpayers concerning digital customer service. The purpose of the **Third Party Refund Status Application Programming Interface Taxpayer Experience Survey** is to gather information on the effectiveness of a recent pilot project to distribute taxpayer refund information through tax preparation firms and their software. According to IRS records, your 2015 tax return was part of that pilot project. You may have consented to this service by answering "Yes" to the existing Third Party Designee question on the Form 1040 series of your individual tax return. By completing this survey, you will help the IRS in determining if this year's pilot project worked properly provided value to taxpayers, and if this service should be made available to all individual taxpayers.

The survey should take about 5 minutes to complete and your participation in this survey is entirely voluntary, but please know your responses are very important to the usefulness of the results.

Your information will be kept private to the fullest extent allowed by law, and may not be disclosed except as required by law. Information may be disclosed to an IRS contractor who is required to adhere to protections established by the Privacy Act and contractual obligations to safeguard the information you provide. CONTRACTOR NAME will conduct the survey on behalf of the IRS, starting on XXXX. CONTRACTOR NAME will provide the IRS with survey responses without any identifying information about you and will keep your identity private to the fullest extent of the law.

You can access the survey from any computer that has web access by typing the following address into your browser and then entering the unique password provided below:

<http://insert-???-link-here.com>

Password: [insert password]

Please complete the online survey by MONTH DAY, 2016

Please help us in this effort by completing the survey as soon as possible. If you do not receive a link to the survey by Month/ Day/2016 or have any questions, please contact (Name here) at CONTRACTOR NAME Survey Help Desk by emailing XXXXXX.com or via telephone (toll-free) at 1-888-XXX-XXXX. If you wish to verify the IRS's sponsorship of the survey, please contact us at 1-888-999-0000 or at irs.gov and search for Customer Satisfaction Surveys.

Thank you in advance for your participation,

Toni Cross
Director, Strategies and Solutions
IRS, Wage and Investment Division

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 Special Services Section, SE:W:CAR:MP:T:M:S, Room 6129, 1111 Constitution Ave. NW, Washington, DC 20224

ATTACHMENT B: Information Collection Request
Wave 2 – Reminder Postcard

DATE

ID#
FIRSTNAME LASTNAME
SAMPLE ADDRESS 1
SAMPLE ADDRESS 2
SAMPLE ADDRESS 3 POSTAL CODE

Do We Have Your Input Yet?

Recently, CONTRACTOR NAME sent you a survey on behalf of the IRS related to your experience with the ***Third Party Refund Status Application Programming Interface***. If you have already completed the survey, please accept my sincere thanks. If not, please take a few minutes to complete it today. Your input is important and we want to be sure we include your feedback.

The survey can be accessed by typing the following address into your browser: **<http://insert-???-link-here.com>**. Then entering the unique password provided in the previous correspondence.

If you did not receive your survey password, or it has been lost, please contact (Name here) at CONTRACTOR NAME by emailing XXXXXX.com or via telephone (toll-free) at 1-888-XXX-XXXX.

Sincerely,

Toni Cross
Director, Strategies and Solutions
IRS, Wage and Investment Division

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Third Party Refund Status API Survey

Introduction

Dear Taxpayer:

The purpose of this survey is to gather information on the effectiveness of a recent pilot project to distribute taxpayer refund information through tax preparation firms and their software. The IRS delivered refund information through third party providers and you may have been part of that pilot project. By completing this survey, you will help the IRS in determining if this year's pilot project worked properly provided value to the taxpayer, and if this service should be made available to all individual taxpayers. This survey should take less than five minutes to complete. Thank you for your cooperation.

Q1: Were you due a federal refund for tax year 2015?

Mark only one oval.

- Yes
 No (Stop. Thank you for your participation.)

Q2: Have you received your federal refund for tax year 2015?

Mark only one oval.

- Yes
 No

Q3: Did you authorize your tax preparation firm (or their software) to obtain your tax refund status from the IRS on your behalf?

Mark only one oval.

- Yes
 No
 I don't remember

Q4: Did you receive messages concerning your refund status from your tax preparation firm?

Mark only one oval.

- Yes
 No (Skip to Q9)
 I don't remember (Skip to Q9)

Q5: How many messages did you receive from the tax preparation firm?

Mark only one oval.

- One message only
 Daily messages until I received my refund
 A message every time my refund status changed
 Sporadic messages
 Other _____

Q6: In what form were messages from your tax preparation firm delivered?

Mark all that apply.

- Information was available when I logged into my tax preparation web site
- Text messages via my smart phone
- Email
- Personal contact or telephone call
- Other _____

Q7: Were the messages received from your tax preparation firm valuable?

Mark only one oval.

- Yes
- No, why not _____

Q8: Were the messages clear?

Mark only one oval.

- Yes
- No, why not _____

Q9: If this new service of delivering messages through your tax preparation firm was made permanently available, would you use it?

Mark only one oval.

- Yes
- No
- Not sure

Q10: If this new service of delivering messages through your tax preparation firm was not available, how would you find out about the status of your refund?

Mark all that apply.

- I would not contact the IRS
- I would call the IRS automated telephone line
- I would call the IRS to speak with a Customer Service Representative
- I would use the IRS2Go mobile application
- I would visit the "Where's My Refund" page on the www.irs.gov website
- I would contact my tax preparation firm
- Other _____

Q11: Did you obtain any 2015 tax refund status messages directly from the IRS?

Mark all that apply.

- Yes, I called the IRS automated telephone line
- Yes, I called the IRS to speak with a Customer Service Representative
- Yes, I used the IRS2Go mobile application
- Yes, I visited the "Where's My Refund" page on the www.irs.gov website
- Yes, I visited the IRS Taxpayer Assistance Center
- Yes, I wrote the IRS a letter
- No (Skip to Q14)

Q12: What prompted you to contact the IRS?

Mark all that apply.

- I wanted to see if the information provided by my tax preparation firm was the same as the information provided by the IRS
- I thought I would get a faster status report about my refund
- I wanted to get up-to-date information from the IRS
- Other _____

Q13: How did the information that you received from your tax preparation firm compare to the information received directly from the IRS?

- The information was identical
- The information received from the IRS was more current
- The information received from my tax preparation firm was more current

Q14: Prior to tax year 2015, which of the following IRS services have you used?

Mark all that apply.

- Checked refund status (If not checked, skip to Q16)
- Got a transcript (copies of prior year tax returns)
- Made electronic payments
- Set up a payment installment agreement
- Checked the status of my amended return
- Obtained tax forms
- In the past, my only contact with the IRS was to file my tax return
- Other _____

Q15: Prior to tax year 2015, which of the following IRS options did you use to check the status of your refund?

Mark all that apply.

- In the past, I have never contacted the IRS with respect to the status of my refund
- I called the IRS automated telephone line
- I called the IRS to speak with a Customer Service Representative
- I used the IRS2Go mobile application
- I visited the "Where's My Refund" page on the www.irs.gov website
- I called my tax preparation firm
- In the past, I have never contacted the IRS with respect to the status of my refund

Q16: In the future, which of the following tax-related tasks would you prefer to complete through your tax preparation firm?

Mark all that apply.

- Get a tax transcript (copies of prior tax returns)
- Check amount I owe
- Review payment installment agreement information (e.g., due dates)
- Check the status of my amended return
- Receive electronic notices about my tax return
- No additional services should be offered through my tax preparation firm
- Other _____

Q17: Would you recommend this service to others?

Mark only one oval.

Yes
No

Q18: Please rate your overall experience with the Refund Status pilot project

Mark only one oval.

1 2 3 4 5

Not at all Satisfied

Extremely Satisfied

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