

**Please make sure that all instruments, instructions, and scripts are submitted with the request.**

### **Attachments**

**Procedure: The Dillman Method will be used and includes a prenote, a letter with the survey, a reminder postcard, and a reminder letter with the survey, along with postage paid reply envelopes. These mailings and the survey questions are attached below:**

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 had correspondence with the IRS regarding their tax return or who have filed an amended return.

In a few days, you will receive a questionnaire asking your opinions about the process of resolving such issues 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 on customer satisfaction with IRS service.

To keep all replies as anonymous as allowed by law, we have asked an independent research company to administer the survey. The survey processing center employees will process 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 our Survey Processing Center toll-free at 1-800-521-7177, or by email at [irssurveyhelp@forsmarshgroup.com](mailto:irssurveyhelp@forsmarshgroup.com).

Thank you in advance for your cooperation.

Sincerely,



Jane Looney  
Director, Accounts Management  
Wage & Investment Division

LI\_13257-F



**IRS**

IRS WAGE AND INVESTMENT CUSTOMER SATISFACTION SURVEY  
ACCOUNTS MANAGEMENT/ADJUSTMENTS

Dear

A few days ago you received a letter from Jane Looney, Director, Accounts Management, 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 the process of corresponding with the IRS regarding your tax return or filing an amended return. Your responses are critical to the accuracy of this research.

We are sending questionnaires to a random sample of taxpayers who have had such issues. All responses are as anonymous as allowed by law, and your participation is voluntary. We will group your responses with others, so that no individual reply can be traced back to an individual.

The questionnaire is quite brief and should take less than five minutes to complete. Please use the postage-paid reply envelope to return your completed questionnaire. If you have any questions or concerns, please feel free to call us toll-free at 1-800-521-7177, or email us at [irssurveyhelp@forsmarshgroup.com](mailto:irssurveyhelp@forsmarshgroup.com).

The IRS is committed to improving its performance and service to the American public. The 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 these changes.

Thank you in advance for your cooperation.

Sincerely,

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

L2\_13257-F

Research conducted by  **FORS MARSH**  
GROUP

P.O. Box 42048 • Arlington, VA 22204-9048

## IRS WAGE AND INVESTMENT CUSTOMER SATISFACTION ACCOUNTS MANAGEMENT/ADJUSTMENTS

The IRS is trying to improve its services 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 as anonymous as allowed by law to the IRS. If you have any questions about this survey, you may call the Survey Helpline at 1-800-521-7177.

<b>1</b>	<b>Do you recall sending a correspondence or receiving a correspondence from the IRS?</b>	<input type="radio"/> Yes (Reply to question 2) <input type="radio"/> No (Skip to question 3)																														
<b>2</b>	<b>Was the correspondence initiated by you or by the IRS?</b>	<input type="radio"/> By me <input type="radio"/> By the IRS																														
<b>3</b>	<b>Did you file an amended return to the IRS?</b>	<input type="radio"/> Yes (Reply to question 4) <input type="radio"/> I did not file an amended return (Skip to question 5)																														
<b>4</b>	<b>Did you file an amended return because a notice or letter from the IRS prompted you to do so?</b>	<input type="radio"/> Yes, the notice prompted me to file an amended return <input type="radio"/> No, I filed an amended return, but not because I received a notice/letter																														
<b>5</b>	<b>Regardless of whether you agree or disagree with the final outcome, how would you rate your overall satisfaction with the way your issue was handled?</b>																															
	<input type="radio"/> Very dissatisfied <input type="radio"/> Dissatisfied <input type="radio"/> Neither satisfied nor dissatisfied <input type="radio"/> Satisfied <input type="radio"/> Very satisfied																															
<b>6</b>	<b>For the following questions, please focus on the outcome of the issue you recently resolved with the IRS.</b>																															
	<b>How satisfied were you...</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 12.5%;">Very Dissatisfied</th> <th style="width: 12.5%;">Dissatisfied</th> <th style="width: 12.5%;">Neither Satisfied nor Dissatisfied</th> <th style="width: 12.5%;">Satisfied</th> <th style="width: 12.5%;">Very Satisfied</th> <th style="width: 12.5%;">Don't Know / Not Applicable</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"><input type="radio"/> 1</td> <td style="text-align: center;"><input type="radio"/> 2</td> <td style="text-align: center;"><input type="radio"/> 3</td> <td style="text-align: center;"><input type="radio"/> 4</td> <td style="text-align: center;"><input type="radio"/> 5</td> <td style="text-align: center;"><input type="radio"/> NA</td> </tr> <tr> <td style="text-align: center;"><input type="radio"/> 1</td> <td style="text-align: center;"><input type="radio"/> 2</td> <td style="text-align: center;"><input type="radio"/> 3</td> <td style="text-align: center;"><input type="radio"/> 4</td> <td style="text-align: center;"><input type="radio"/> 5</td> <td style="text-align: center;"><input type="radio"/> NA</td> </tr> </tbody> </table>	Very Dissatisfied	Dissatisfied	Neither Satisfied nor Dissatisfied	Satisfied	Very Satisfied	Don't Know / Not Applicable	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	<input type="radio"/> NA	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	<input type="radio"/> NA												
Very Dissatisfied	Dissatisfied	Neither Satisfied nor Dissatisfied	Satisfied	Very Satisfied	Don't Know / Not Applicable																											
<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	<input type="radio"/> NA																											
<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	<input type="radio"/> NA																											
	A. With the final outcome of your recent issue with the IRS?																															
	B. That your outcome was appropriate based on information you provided the IRS?																															
<b>7</b>	<b>For the next set of questions, <u>regardless of your satisfaction with the outcome</u> of your issue, please focus on the <u>process and procedures</u> that the IRS used to address and resolve your issue.</b>																															
	<b>How satisfied were you with the...</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 12.5%;">Very Dissatisfied</th> <th style="width: 12.5%;">Dissatisfied</th> <th style="width: 12.5%;">Neither Satisfied nor Dissatisfied</th> <th style="width: 12.5%;">Satisfied</th> <th style="width: 12.5%;">Very Satisfied</th> <th style="width: 12.5%;">Don't Know / Not Applicable</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"><input type="radio"/> 1</td> <td style="text-align: center;"><input type="radio"/> 2</td> <td style="text-align: center;"><input type="radio"/> 3</td> <td style="text-align: center;"><input type="radio"/> 4</td> <td style="text-align: center;"><input type="radio"/> 5</td> <td style="text-align: center;"><input type="radio"/> NA</td> </tr> <tr> <td style="text-align: center;"><input type="radio"/> 1</td> <td style="text-align: center;"><input type="radio"/> 2</td> <td style="text-align: center;"><input type="radio"/> 3</td> <td style="text-align: center;"><input type="radio"/> 4</td> <td style="text-align: center;"><input type="radio"/> 5</td> <td style="text-align: center;"><input type="radio"/> NA</td> </tr> <tr> <td style="text-align: center;"><input type="radio"/> 1</td> <td style="text-align: center;"><input type="radio"/> 2</td> <td style="text-align: center;"><input type="radio"/> 3</td> <td style="text-align: center;"><input type="radio"/> 4</td> <td style="text-align: center;"><input type="radio"/> 5</td> <td style="text-align: center;"><input type="radio"/> NA</td> </tr> <tr> <td style="text-align: center;"><input type="radio"/> 1</td> <td style="text-align: center;"><input type="radio"/> 2</td> <td style="text-align: center;"><input type="radio"/> 3</td> <td style="text-align: center;"><input type="radio"/> 4</td> <td style="text-align: center;"><input type="radio"/> 5</td> <td style="text-align: center;"><input type="radio"/> NA</td> </tr> </tbody> </table>	Very Dissatisfied	Dissatisfied	Neither Satisfied nor Dissatisfied	Satisfied	Very Satisfied	Don't Know / Not Applicable	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	<input type="radio"/> NA	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	<input type="radio"/> NA	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	<input type="radio"/> NA	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	<input type="radio"/> NA
Very Dissatisfied	Dissatisfied	Neither Satisfied nor Dissatisfied	Satisfied	Very Satisfied	Don't Know / Not Applicable																											
<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	<input type="radio"/> NA																											
<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	<input type="radio"/> NA																											
<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	<input type="radio"/> NA																											
<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	<input type="radio"/> NA																											
	A. Ease of getting more information about your issue?																															
	B. Ease of providing information requested by the IRS?																															
	C. Length of time it took to resolve the issue?																															
	D. Extent to which the IRS used accurate information about you to process your issue?																															

**8** For the next set of questions, **regardless of your satisfaction with the outcome** of your issue, please focus on the **clarity and timeliness of the information** regarding your issue that was provided by the IRS.

How satisfied were you with the...	Very Dissatisfied	Dissatisfied	Neither Satisfied nor Dissatisfied	Satisfied	Very Satisfied	Don't Know / Not Applicable
A. Ease of understanding the initial notice and what was requested of you?	1	2	3	4	5	NA
B. Completeness of instructions you received for resolving your issue?	1	2	3	4	5	NA
C. Ease of understanding responses from the IRS?	1	2	3	4	5	NA
D. The IRS keeping you informed about the status of your case?	1	2	3	4	5	NA
E. Explanation regarding the resolution of your issue?	1	2	3	4	5	NA

**9** For the next set of questions, **regardless of your satisfaction with the outcome** of your issue, please focus on the **personal treatment** you received throughout the process of resolving your issue.

How satisfied were you with the...	Very Dissatisfied	Dissatisfied	Neither Satisfied nor Dissatisfied	Satisfied	Very Satisfied	Don't Know / Not Applicable
A. Appropriateness of the tone of the IRS correspondence concerning your issue?	1	2	3	4	5	NA
B. Politeness of any individuals you spoke with at the IRS concerning your issue?	1	2	3	4	5	NA
C. Respect the IRS treated you with?	1	2	3	4	5	NA
D. Fairness of treatment by the IRS?	1	2	3	4	5	NA

**10** If you were 'very dissatisfied' or 'dissatisfied' with any of the aspects in question 5-8 above, please provide a brief explanation of why you gave this rating in the box provided.

**11** Please mark the topic that best describes your main issue.

- |   |  |
|---|--|
| <input type="checkbox"/> 1 Status of refund         | <input type="checkbox"/> 6 Name/Address changes                  |
| <input type="checkbox"/> 2 Status of payment        | <input type="checkbox"/> 7 Credits (child care, education, etc.) |
| <input type="checkbox"/> 3 Penalty/Interest charges | <input type="checkbox"/> 8 Other changes to original return      |
| <input type="checkbox"/> 4 Earned income credit     | <input type="checkbox"/> 9 Other (Please specify) _____          |
| <input type="checkbox"/> 5 Exemptions/Dependents    |  |

**12** For this recent interaction, how many days elapsed between the time you submitted your correspondence or amended return and the time you received a reply?

- |  |  |
|--|--|
| <input type="checkbox"/> 1 Less than 15 days | <input type="checkbox"/> 4 45-60 days              |
| <input type="checkbox"/> 2 15-29 days        | <input type="checkbox"/> 5 Over 60 days            |
| <input type="checkbox"/> 3 30-44 days        | <input type="checkbox"/> 6 Did not receive a reply |

**14** Was your issue with the IRS completely resolved?

- 1 Yes  
 2 No (Skip to question 16)  
 3 Not sure (Skip to question 16)

**13** What do you think is a reasonable time frame to wait for the IRS to respond to your issue?

- |  |   |
|--|---|
| <input type="checkbox"/> 1 Less than 15 days | <input type="checkbox"/> 4 45-60 days   |
| <input type="checkbox"/> 2 15-29 days        | <input type="checkbox"/> 5 Over 60 days |
| <input type="checkbox"/> 3 30-44 days        |   |

**15** How many days did it take to resolve your issue from the time you contacted, or were contacted by, the IRS about this issue?

- |  |   |
|--|---|
| <input type="checkbox"/> 1 Less than 15 days | <input type="checkbox"/> 4 45-60 days   |
| <input type="checkbox"/> 2 15-29 days        | <input type="checkbox"/> 5 Over 60 days |
| <input type="checkbox"/> 3 30-44 days        |   |

**16** Did you...? **1** Use a tax professional to assist you with resolving your issue  
**2** Represent yourself  
**3** Other

**17** Did you use any of the following methods to contact the IRS about this issue?

	Yes	No
A. Email	<b>1</b>	<b>2</b>
B. Mail	<b>1</b>	<b>2</b>
C. Toll-free line	<b>1</b>	<b>2</b>
D. In person	<b>1</b>	<b>2</b>
E. Other (Please specify) _____	<b>1</b>	<b>2</b>

**18** Have you contacted the IRS about the same issue for any prior year's tax return?  
**1** Yes  
**2** No (If you have NOT contacted the IRS about this issue before, please skip to question 20)

**19** How would you rate the level of service received from this contact versus previous contacts?  
**1** Better  
**2** Worse  
**3** The same

**20** How much do you agree with the following statement?

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Not Applicable
A. I received an adequate description of the Adjustments process	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	NA
B. My experience reflected the described Adjustments process	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	NA
C. I had the opportunity to provide information important to my case	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	NA
D. I was treated with respect during the Adjustments process	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	NA

**21** Overall, how well did the IRS meet your expectations while handling your Adjustments case?  
**1** Much better than expected  
**2** Better than expected  
**3** As expected  
**4** Worse than expected  
**5** Much worse than expected

**22** 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?

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.

PHONE NUMBER

EMAIL 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 call the Taxpayer Advocate Service at 1-877-777-4778.

23

Use this space for comments or suggestions for improvements.

<hr/> <hr/> <hr/>
-------------------

**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.

**Thank you for completing the survey.**

**Please return the questionnaire to P.O. Box 42048, Arlington, VA 22204-9927 USA.**



**IRS**

IRS WAGE AND INVESTMENT CUSTOMER SATISFACTION SURVEY  
ACCOUNTS MANAGEMENT/ADJUSTMENTS

Dear

A few weeks ago you received a letter from Jane Looney, Director, Accounts Management, asking for your help with an important research project. So far, we have not received your completed questionnaire. 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 process of corresponding with the IRS regarding your tax return or filing an amended return. Your responses are critical to the accuracy of this research.

We are sending questionnaires to a random sample of taxpayers who have had such issues. All responses are as anonymous as allowed by law, and your participation is voluntary. We will group your responses with others, so that no individual reply can be traced back to an individual.

The questionnaire is quite brief and should take less than five minutes to complete. Please use the postage-paid reply envelope to return your completed questionnaire. If you have any questions or concerns, please feel free to call us toll-free at 1-800-521-7177, or email us at [irssurveyhelp@forsmarshgroup.com](mailto:irssurveyhelp@forsmarshgroup.com).

The IRS is committed to improving its performance and service to the American public. The 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 these changes.

Thank you in advance for your cooperation.

Sincerely,

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

L4\_13257-F

Research conducted by  **FORS MARSH**  
GROUP

P.O. Box 42048 • Arlington, VA 22204-9048





**FORS | MARSH**  
GROUP

IRS WAGE AND INVESTMENT  
CUSTOMER SATISFACTION SURVEY  
ACCOUNTS MANAGEMENT/  
ADJUSTMENTS

## Do We Have Your Input Yet?

Recently, you received a questionnaire asking your opinions about the services 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 1-800-521-7177.**

Sincerely,

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

L3\_13257-F



IRS WAGE AND INVESTMENT  
CUSTOMER SATISFACTION SURVEY  
ACCOUNTS MANAGEMENT/  
ADJUSTMENTS

P.O. BOX 42048  
ARLINGTON, VA 22204-9048

PRESORTED  
FIRST CLASS MAIL  
POSTAGE & FEES PAID  
IRS  
PERMIT NO. G-48

RESEARCH  
CONDUCTED BY



**FORS | MARSH**  
GROUP

