

Welcome to the Appeals Team Case Conferencing Initiative Survey

You have received this section of the survey because of your participation in the Appeals Team Case Conferencing Initiative (“Initiative”). These questions are intended to provide Appeals feedback about the Initiative.

For many years, Appeals Officers have had the discretion to invite IRS Examination personnel (“Compliance”) to Appeals conferences; this Initiative makes Compliance attendance routine for certain ATCL cases. As in the past, settlement negotiations are held between Appeals and the taxpayer without Compliance present, unless otherwise agreed to by the parties. Under the Initiative, the ATCL is also responsible for coordinating and moderating a telephone call (“expectations telephone call”) prior to the conference explaining the Appeals mission and the conference process.

Appeals Team Case Conferencing Initiative Survey

1. Are you the...
 - Taxpayer
 - Taxpayer’s representative/power of attorney
 - Corporate Officer
 - In-house Counsel
 - Other, please specify _____

2. Before your participation in the Initiative, approximately how many cases have you been involved with that were considered by Appeals?
 - 0
 - 1 to 3
 - 4 to 5
 - More than 5

3. In the following question, please rate your satisfaction with the following items using the following scale:
 - Very Satisfied
 - Somewhat satisfied
 - Neither satisfied nor dissatisfied
 - Somewhat dissatisfied
 - Dissatisfied
 - Not applicable

In answering these questions, please think about specific aspects of the process and not just the outcome of your appeal.

How satisfied were you with the ...

- a) Explanation of the Appeals mission?
- b) Explanation of the Initiative?

- c) Expectations telephone call?
- d) Appeals Conference with both taxpayer and Compliance in attendance?
- e) Length of the Appeals process?
- f) Outcome of the Appeals process?
- g) Overall Appeals process?

(Note: this is 7 questions in all.)

4. Do you think the expectations telephone call was beneficial to the Appeals' process?
- Yes
 - No
 - Not sure

5. Please explain your response.

6. Do you think the attendance of representatives of both taxpayer and Compliance at the non-settlement portion of the conference was beneficial?

- Yes
- No
- Not sure

7. Please explain your response. _____

8. Do you think the Initiative resulted in an earlier case resolution?

- Yes
- No
- Not sure

9. Please explain your response. _____

10. Do you think the Initiative supported Appeal's mission of independence?

- Yes
- No
- Not sure

11. Please explain your response. _____

12. Do you think Compliance should attend Appeals' conferences together with taxpayer's representatives for large complex cases, provided settlement negotiations remain only between Appeals and the taxpayer's representatives?

- Yes
- No
- Not sure

13. Please explain your response. _____

14. Do you have any suggestions for improvement of the Initiative? If so, please explain your response. _____

15. Is there any other feedback you would like to provide?