

## Welcome to the Appeals Team Case Conferencing Initiative Survey

You have received this survey because of your participation in the Appeals Team Case Conferencing Initiative (“Initiative”).

The Appeals mission is to resolve tax controversies, without litigation, on a basis which is fair and impartial to both the government and the taxpayer and in a manner, that will enhance voluntary compliance and public confidence in the integrity and efficiency of the Service. 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.

This survey is intended to provide Appeals feedback about the Initiative. Research, Applied, Analytics and Statistics is conducting this survey on behalf of the Office of Appeals. The survey will not provide any identifying information to the IRS.

This survey should take no more than **XX** minutes to complete. The survey will be available until **Month Day, Year**.

You will be able to save your answers at any point and return to complete the survey at another time. **(Add any other instructions such as passwords.)**

### PRIVACY ACT NOTIFICATION

*The principal purpose for requesting this information is to gather data on -----, The authority for requesting this information is Title 5 of the United States Code (USC).*

*Providing the information is voluntary. However, if you do not provide the information, the Appeals Office may not be able to make a fully informed decision that takes into account employee ----- when considering -----, The information may be disclosed to contractors when authorized by law. However, we do not anticipate disclosure to a contractor since we are conducting the survey internally.*

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### Appeals Team Case Conferencing Initiative Survey

1. Did you participate in the Initiative during a recent tax appeals process?
  - Yes
  - No (send to final questions/ Thank you notice)
  
2. 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
- Very 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 ...

- Explanation of the Appeals mission?
- Explanation of the Initiative?
- Expectations telephone call?
- Appeals Conference with both taxpayer and Compliance in attendance?
- Length of the Appeals process?
- Outcome of the Appeals process?
- Overall Appeals process?

3. Do you think the expectations telephone call was beneficial to the Appeals' process?

- Yes
- No
- Not sure

4. Please explain your response.

\_\_\_\_\_

5. 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

6. Please explain your response. \_\_\_\_\_

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

- Yes
- No
- Not sure

8. Please explain your response. \_\_\_\_\_

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

- Yes
- No
- Not sure

10. Please explain your response. \_\_\_\_\_

11. 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

12. Please explain your response. \_\_\_\_\_

13. Do you have any suggestions for improvement of the Initiative? If so, please explain your response. \_\_\_\_\_

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