///AUTHENTICATION PAGE///
///ASK ALL///
///REQUIRE RESPONSE///
INTRO1. Welcome to the 2015 IRS Appeals Survey. Your name was randomly selected from a list of taxpayers who have recently appealed a tax issue with the IRS Appeals Office.

The Office of Appeals is independent of any other IRS office and provides a place where disagreements about the application of tax law can be resolved on a fair and impartial basis. This is a survey to give the Appeals Office feedback on how they can improve the service they provide to customers like you. This survey should take no more than 10 minutes.

ICF International, an independent research company, is conducting this survey on behalf of the Office of Appeals. Kirsten Wielobob is the Chief of Appeals. ICF will not provide any identifying information to the IRS and will keep your identity private to the extent permitted by law. If you have any questions about the survey, please contact the ICF Help Desk at IRSAppealsSurvey@icfi.com or 1-800-427-4275.

To verify the authenticity of the survey, please visit 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 Appeals.

You will be able to exit at any point and re-enter where you left off. Just return to http://www.IRSAppealsSurvey.com and enter your unique password.

Please enter your password: [   ]

[Submit]

Please note: if you close the survey without clicking the "STOP" button, you will need to wait 10 minutes to re-enter the survey.

The OMB number for this study is 1545-2250.

///SURVEY STOPPED PAGE ///
Your responses have been saved. When you are ready to continue the survey, please return to http://www.IRSAppealsSurvey.com and enter your unique password. You will then be taken to the point where you left off.

///ASK ALL///

Instructions

Before you begin, here are some instructions about how the survey works:

- Click on the **NEXT** button to save your responses and continue to the next page.

- Click on the **PREVIOUS** button to view your responses on a previous page. You may change your answers to responses already entered. **Do not use your browser's Back button.** This may cause you to exit the survey.

- You may suspend the survey at any time by clicking **STOP.** You may re-enter the survey where you left off by going to http://www.IRSAppealsSurvey.com and re-entering your unique password. If you close your browser without clicking STOP, the survey will automatically halt and you will need to wait 10 minutes to re-access the survey and continue where you left off.

Q2.   Are you the person who worked with the IRS Appeals Officer/Settlement Officer on a recent tax appeals process, for yourself or on behalf of your company or a client?

01   Yes ///GO TO Q3///
02   No, I never had a case with the IRS Appeals Office
03   No, I had a case with the IRS Appeals Office, but I am not the person who worked with Appeals Officer/Settlement Officer
88   NO ANSWER ///HIDDEN///

///IF Q2=02,03,88 THEN: DISPLY THE FOLLOWING SCREEN:

Thank you for your time. Those are all the questions we have for you.

        AND, TERM AS DISP 26

Q3.   Are you the…

01   Taxpayer
02   Taxpayer's representative/power of attorney (POA)
03   Corporate Officer (Please specify) ///q3_othop3 NO ANSWER ///HIDDEN/// q3_othop3_codes=88
_____
04   Other (Please specify) ///q3_othop4 NO ANSWER ///HIDDEN///q3_othop4_codes=88
_____
88   NO ANSWER ///HIDDEN///

Q3a.   How many times have you gone through the appeals process in the past 12 months?

        This question is referring to all cases you have represented in Appeals during the last 12 months.

_____ Enter response [0 – 250]
88   NO ANSWER ///HIDDEN, STORE AS Q3a_CODES=88///

POATP. For this survey, please think about the case concerning <TP_NAME_CLEAN>.

Q3b. In regards to this specific situation which required you to appeal your case, how satisfied were you with your IRS experience prior to coming through the Office of Appeals?

Again, please think about only your experience with the IRS before you began working with Appeals.

05   Very satisfied
04   Somewhat satisfied
03   Neither satisfied nor dissatisfied
02   Somewhat dissatisfied
01   Very dissatisfied
96   Not Applicable
88   NO ANSWER ///HIDDEN///

Q5_1. Regardless of the outcome of your appeal, please rate your overall satisfaction with the Appeals process.

05   Very satisfied
04   Somewhat satisfied
03   Neither satisfied nor dissatisfied
02   Somewhat dissatisfied
01   Very dissatisfied
96   Not Applicable
88   NO ANSWER ///HIDDEN///

ADRA. Thank you. The remainder of the questions will focus on the process of resolving your tax case with the Appeals Office and not any other offices within the IRS that you have had contact with. The first few questions are about the Appeals' Alternative Dispute Resolution, or ADR, program that was designed to resolve issues during the audit process. The ADR program includes processes such as Fast Track Mediation, Fast Track Settlement, Post-Appeals Mediation, Arbitration, Early Referral, and Competent Authority.

ADR0.   Our records indicate that you participated in the Alternative Dispute Resolution or ADR program, specifically the <ADRNAME> process. Do you recall participating in this program?

01   Yes   //GO TO ADR2A//
02   No   //GO TO Appeals Section introduction//
98   I don't know   //GO TO Appeals Section Introduction//
88   NO ANSWER ///HIDDEN/// ///GO TO Appeals Section introduction///

ADR1. The IRS records indicate that you didn't use the Alternative Dispute Resolution or ADR program. Did Appeals or Compliance explain the ADR option to you during the audit?

01   Yes
02   No   //GO TO Appeals Section introduction//
03   I did use ADR   //GO TO ADR2//
98   I don't know   //GO TO Appeals Section introduction//
88   NO ANSWER ///HIDDEN/// ///GO TO Appeals Section introduction///

ADR1a. Why did you decide not to use ADR?

ENTER RESPONSE:_____ //TEXT RANGE 5,000//
88   NO ANSWER ///HIDDEN, STORE AS ADR1a_CODES=88///

ADR2.   Please rate your satisfaction with the following statements. If a question does not apply to you please select 'Not Applicable.' In answering these questions, please think about the entire process and not just the outcome of your appeal.

05   Very satisfied
04   Somewhat satisfied
03   Neither satisfied nor dissatisfied

02   Somewhat dissatisfied
01   Very dissatisfied
96   Not Applicable
88   NO ANSWER ///HIDDEN///

    A.   The ADR process was impartial.
    B.   The mediator/arbitrator (if used) was impartial.
    C.   Both sides negotiated in good faith.
    D.   The ADR process was effective.
    E.   The ADR process helped create realistic options for settling the dispute.

///ASK IF ADR1 = 3 or (ADRFLAG= 1 and ADR0 = 1)///
ADR3.   Did you save money by using ADR instead of the established administrative process or litigation? Please consider the cost of a formal protest, representation, or interest expense.

01   Yes
02   No   ///*SKIP TO ADR4///*
98   I don't know   ///*SKIP TO ADR4///*
88   NO ANSWER ///HIDDEN/// ///SKIP TO ADR4///

///ASK IF ADR3=01///
ADR3a. Please estimate how much you saved in a dollar amount.

ENTER RESPONSE: _____ [$1 - 9,999,999]

88   NO ANSWER ///HIDDEN, STORE AS ADR3a_CODES=88///

///ASK IF ADR1 = 3 or (ADRFLAG= 1 and ADR0 = 1)///
ADR4.   Did you save time by using ADR instead of the established administrative process or litigation?

01   Yes, I saved time
02   No, the time was about the same
03   No, the time increased
98   I don't know
88   NO ANSWER ///HIDDEN///

///ASK IFADR4=1///
ADR4a. How much time did you save, in months?

01   1 month or less
02   2-4 months
03   5-10 months
04   Over 10 months
88   NO ANSWER ///HIDDEN///

///ASK If ADR4=3///
ADR4b. How much did the time increase, in months?

01   Increased 1 month or less
02   Increased 2-4 months
03   Increased 5-10 months
04   Increased over 10 months
88   NO ANSWER ///HIDDEN ///

ADR5.   Did the ADR process timeframes meet your expectations?

01   Yes
02   No
88   NO ANSWER ///HIDDEN

ADR6.   Thinking only of your experience with the ADR process and not your experiences with other parts of the Appeals process—overall, how satisfied were you with the ADR process?

05   Very satisfied
04   Somewhat satisfied
03   Neither satisfied nor dissatisfied
02   Somewhat dissatisfied
01   Very dissatisfied
88   NO ANSWER ///HIDDEN ///

ADR7. Would you use ADR again?

01   Yes
02   No
88   NO ANSWER ///HIDDEN ///

ADR7a. Why wouldn't you use ADR again?

ENTER RESPONSE: _____ //TEXT RANGE 5,000//
88   NO ANSWER ///HIDDEN, STORE AS ADR7a_CODES=88///

ADR8. Would you recommend ADR to others?

01   Yes
02   No
98   Not sure, it depends
88   NO ANSWER ///HIDDEN/// ///GO TO ADR9///

ADR8a. \ Why would you say that?
ENTER RESPONSE: _____ //TEXT RANGE 5,000//
88   NO ANSWER ///HIDDEN, STORE AS ADR8a_CODES=88///

ADR9.   Is there anything the Internal Revenue Service could do to improve the ADR process?

01   Yes
02   No
88   NO ANSWER ///HIDDEN///

ADR9WHAT. What could the Internal Revenue Service do to improve the ADR process?

ENTER RESPONSE: _____ ///TEXT RANGE 5,000///
88   NO ANSWER ///HIDDEN, STORE AS ADR9WHAT_CODES=88///

ENDADR   Thank you for your feedback on the ADR process.

 Appeals Section
AINTRO. The next few questions will focus on the process of resolving your tax case with the Appeals Office. Please focus on your experience with the Appeals Office, and not any other experiences you have had within the IRS.

Q4   Please rate your satisfaction with the following items. If a question does not apply please select 'Not Applicable.' In answering these questions, please think about the entire process and not just the outcome of your appeal. How satisfied were you with the …

05   Very satisfied
04   Somewhat satisfied
03   Neither satisfied nor dissatisfied
02   Somewhat dissatisfied
01   Very dissatisfied
96   Not Applicable
88   NO ANSWER ///HIDDEN///

   Q4_A_.   Explanation by Appeals of the appeals process.
   Q4_B_.   Explanation by Appeals of your rights if a resolution is not reached in Appeals.
   Q4_C_.   Clarity of the Appeals explanation of records and documents needed for the appeal.
   Q4_D_.   Consideration by Appeals of the information that you presented.
   Q4_E_.   Application of the law by Appeals to the facts in your case.
   Q4_F_.   Appeals Officer's knowledge of your industry's issues and practices.
   Q4_G_.   Appeals staff listening to your concerns.
   Q4_I_.   Professionalism of the Appeals person.
   Q4_J_.   Degree of respect shown to you.
   Q4_K_.   Clarity of explanations provided for adjustments made to
      your tax liability.
   Q4_L_.   Explanation by Appeals of your payment options.

   Q4_N_.   Time it took to hear from Appeals after you notified the IRS you wanted an appeals conference.

Q4Na.   How many days do you feel it should have taken to hear from Appeals after you notified the IRS you wanted an appeals conference?

Number of Days: ___[0 - 997]
88   NO ANSWER ///HIDDEN, STORE AS Q4Na_CODES=88///

Q4_O_.   Time it took Appeals to schedule your initial conference after they first contacted you.

05   Very satisfied
04   Somewhat satisfied
03   Neither satisfied nor dissatisfied
02   Somewhat dissatisfied
01   Very dissatisfied
96   Not Applicable
88   NO ANSWER ///HIDDEN///

///ASK IF Q4O in (01,02)///
Q4_O_ax. How many days do you feel it should have taken to schedule your initial conference after they first contacted you?

Number of Days: ___[0 - 997]
88   NO ANSWER ///HIDDEN, STORE AS Q4Oax_CODES=88///

///ASK IF Q2=01///
Q4_P_.   Length of the appeals process, from start to finish.

05   Very satisfied
04   Somewhat satisfied
03   Neither satisfied nor dissatisfied
02   Somewhat dissatisfied
01   Very dissatisfied
96   Not Applicable
88   NO ANSWER ///HIDDEN///

//ASK IF Q4P in (01,02)///
Q4_P_a.   How many days do you feel the length of the appeals process should have taken, from start to finish?

Record Number of Days: ___[0 - 997]
88   NO ANSWER ///HIDDEN, STORE AS Q4Pa_CODES=88///

///ASK IF Q2=01///
Q4_Q_.   Degree of independence that Appeals had from the people who proposed the adjustments.

        Did Appeals take a "fresh" look at the disputed items?

05   Very satisfied
04   Somewhat satisfied
03   Neither satisfied nor dissatisfied
02   Somewhat dissatisfied
01   Very dissatisfied
96   Not Applicable
88   NO ANSWER ///HIDDEN///

///ASK IF Q4Q in (01,02)///
Q4_Q_a.   In what way did you feel Appeals was not independent from the people who proposed the adjustments?

ENTER RESPONSE: _____   //TEXT RANGE 5,000///
88 NO ANSWER ///HIDDEN, STORE AS Q4_Q_a_CODES=88///

Q4R. Did you visit www.IRS.gov during your appeal?

    01   Yes
    02   No
    03   I don't remember
    88   NO ANSWER ///HIDDEN///

Q4Ra. Did you find the information on www.IRS.gov helpful in understanding the appeals process?

    01   Yes
    02   No
    88   NO ANSWER ///HIDDEN///

Q5a.   What was the most dissatisfying aspect of the process?

ENTER RESPONSE: _____ //TEXT RANGE 5,000///
88 NO ANSWER ///HIDDEN, STORE AS Q5a_CODES=88///

Q5b. What was the most positive aspect of the appeals process?

ENTER RESPONSE: _____//TEXT RANGE 5,000///
88 NO ANSWER ///HIDDEN, STOE AS Q5B_CODES=88///

Q6   Do you have any suggestions for improvement of the appeals process?

01   Yes
02   No
88   NO ANSWER ///HIDDEN///

Q6a.   What other suggestions do you have for Appeals to improve the appeals process?

ENTER RESPONSE: _____ //TEXT RANGE 5,000//
88 NO ANSWER ///HIDDEN, STORE AS Q6a_CODES=88///

Q7. What is your preferred method of communication with the Appeals Office to resolve your case?

01   Mail
02   Telephone
03   In-person
04   E-mail
05   Fax Machine
88   NO ANSWER ///HIDDEN///

Q7EMAIL. Please note that Appeals is currently prohibited from sending e-mails to taxpayers or their representatives, but may receive them.

Q8. Occasionally, ICF conducts additional in-depth IRS Appeals-related 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 research purposes.

01   I am interested in participating in future research.
02   I am NOT interested in participating in future research.
88   NO ANSWER ///HIDDEN///

Phone2. Please enter the telephone number where you would like us to call you.
_____
88 NO ANSWER ///HIDDEN, STORE AS PHONE2_CODES=88///

Email. Please enter your email address.
_____
88   NO ANSWER ///HIDDEN, STORE AS EMAIL_CODES=88///

CLOSING COMMENTS
CLOSING. That completes the survey. If you have any comments about the time estimate to complete the survey or ways to improve the survey, you may write to the IRS. The address is:

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

Thank you for your help with this important survey.