

FY 2023 Independent Office of Appeals Web Survey Instrument

INTRO1. Welcome to the Internal Revenue Service (IRS) Appeals Survey. ICF, an independent research company, is conducting this survey on behalf of the Independent Office of Appeals to get feedback on the service they provide. The Independent 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 voluntary survey should take around 5 minutes to complete.

To verify this survey, visit www.irs.gov/css and look for *Appeals*. If you have questions about this survey, please feel free to email us at IRSAppealsSurvey@icfsurvey.com or call the help line at 1-800-427-4275.

Please enter your 10-digit password below and click Submit.

Password: []

[Submit]

Disclosure and Security

ICF will not provide any identifying information to the IRS and will keep your identity private to the extent permitted by law. We'll use your answers solely for the purpose stated above.

Privacy Act and Paperwork Reduction Act Notice

Our authority for requesting information with this survey is 5 U.S.C. § 301, and 26 U.S.C. § 7801, 7803, and 7805. The information you provide will help us determine steps to improve our service to taxpayers and practitioners. We estimate that it will take around 5 minutes to complete this survey. Providing the information is voluntary; not answering some or all of the questions will not affect you.

The information we collect may be disclosed as authorized by the routine uses published for the Privacy Act System of Records entitled Treas/IRS 00.001 Correspondence Files and Correspondence Control Files, as published in the Federal Register: September 8, 2015 (Volume 80, Number 173) pages 54065-6. Before we conduct or sponsor a request for information, the Paperwork Reduction Act requires that we provide an OMB control number. The OMB number for this survey is 1545-2290.

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ASK ALL

Instructions

- 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.

ASK ALL

Q1. If you worked with the IRS Appeals Officer or Settlement Officer on a recent tax appeals process, are you the taxpayer or representative?

- 01 Taxpayer
- 02 Representative
- 03 Other
- 04 I never had a case with the Independent Office of Appeals
- 05 I had a case with the Independent Office of Appeals, but I am not the person who worked with the Appeals Officer or Settlement Officer

IF Q1=04,05,888

TERM1. Thank you for your time. Those are all the questions we have for you.

ASK IF Q1=02 Representative

POATP. For this survey, please think about the case concerning [survey will fill in taxpayer name].

- 01 CONTINUE

ASK ALL

Q2. Regardless of the outcome of your appeal, rate your satisfaction with the appeals process on a scale of 1 to 5, with 1 being very satisfied, 3 neither satisfied nor dissatisfied, and 5 very dissatisfied.

- 01 Very satisfied
- 02 Somewhat satisfied
- 03 Neither satisfied nor dissatisfied
- 04 Somewhat dissatisfied
- 05 Very dissatisfied

ASK ALL

INTRO2. The next seven questions will ask you to rate your level of agreement with a series of statements.

ASK ALL

Q3. Regardless of the outcome of your appeal, rate your level of agreement with the following statement:

This interaction increased my trust in the Independent Office of Appeals.

- 01 Strongly agree
- 02 Agree
- 03 Neither agree nor disagree

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- 04 Disagree
- 05 Strongly disagree

ASK ALL

Q4. Regardless of the outcome of your appeal, rate your level of agreement with the following statement:

I am satisfied with the service I received from the Independent Office of Appeals.

- 01 Strongly agree
- 02 Agree
- 03 Neither agree nor disagree
- 04 Disagree
- 05 Strongly disagree

ASK ALL

Q5. Regardless of the outcome of your appeal, rate your level of agreement with the following statement:

My need was addressed.

- 01 Strongly agree
- 02 Agree
- 03 Neither agree nor disagree
- 04 Disagree
- 05 Strongly disagree

ASK ALL

Q6. Regardless of the outcome of your appeal, rate your level of agreement with the following statement:

It was easy to complete what I needed to do.

- 01 Strongly agree
- 02 Agree
- 03 Neither agree nor disagree
- 04 Disagree
- 05 Strongly disagree

ASK ALL

Q7. Regardless of the outcome of your appeal, rate your level of agreement with the following statement:

From the first time that I heard from the Appeals Officer, it took a reasonable amount of time to complete my appeal.

- 01 Strongly agree
- 02 Agree
- 03 Neither agree nor disagree
- 04 Disagree
- 05 Strongly disagree

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ASK ALL

Q8. Regardless of the outcome of your appeal, rate your level of agreement with the following statement:

I was treated fairly by the Independent Office of Appeals.

- 01 Strongly agree
- 02 Agree
- 03 Neither agree nor disagree
- 04 Disagree
- 05 Strongly disagree

ASK ALL

Q9. Regardless of the outcome of your appeal, rate your level of agreement with the following statement:

The Independent Office of Appeals employees that I interacted with were helpful.

- 01 Strongly agree
- 02 Agree
- 03 Neither agree nor disagree
- 04 Disagree
- 05 Strongly disagree

ASK ALL

INTRO3. The remaining questions will ask you about different aspects of your experience with the Independent Office of Appeals.

ASK ALL

Q10. What type of conference would you prefer if you were to come back to the Independent Office of Appeals in the future?

- 01 In-person
- 02 Telephone
- 03 Mail
- 04 Video conference such as WebEx or Zoom

ASK ALL

Q11. Did the Appeals Officer explain how they are separate from the rest of IRS?

- 01 Yes
- 02 No

ASK ALL

Q12. Whether or not you agree with the decision, did you understand why the Independent Office of Appeals reached the decision it did in your case?

- 01 Yes
- 02 No

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ASK ALL

Q13. Did the Appeal Officer consider your side of the dispute?

01 Yes

02 No

ASK ALL

Q14. Was the Appeals Officer professional?

01 Yes

02 No

ASK ALL

Q15. Do you have any other comments that you would like to add or suggestions on how to improve the appeal process?

[TEXT BOX]

//TEXT RANGE 5,000//