

FY 2021 Independent Office of Appeals Web Survey Instrument

SAMPLE VARIABLES:

REPFLAG. Imported sample variable: REPFLAG

0 Taxpayer
1 POA/Rep

NAMEFLAG. Imported sample variable: NAMEFLAG

I Individual
B Business

RESPFLAG. Imported sample variable: RESPFLAG

T Taxpayer
B Business

MFT. Imported sample variable: MFT

0 non ic/cic
1 ic/cic
2 exm/tege

Sample elements:

NAME, AREA CODE AND TELEPHONE NUMBER:

DATE AND TIME OF INTERVIEW:

MFT CODES:

IC/CIC

FEATRCOD

///DISPLAY ICF logo on all screens – upper left corner ///

///DISPLAY Appeals logo on all screens – upper right corner (see J:\Projects\TBD

///Display at bottom of all screens: “For technical assistance, please contact our Help Desk”//
(points to IRSAppealsSurvey@icfsurvey.com.///

///Display “PREVIOUS”, “NEXT”, “STOP” navigation buttons on all screens///

///PROGRAMMER – ALL QUESTIONS PROVIDE HIDDEN NO ANSWER RESPONSE///

///PROGRAMMER – DO NOT DISPLAY SCREEN/VARIABLE NAMES//

PROGRAMMER – DISPLAY THE FOLLOWING AT THE BOTTOM ON ALL SCREENS: Form
15213 (Rev 5-2019) Catalog Number 72611F OMB number 1545-2290 Department of the
Treasury - Internal Revenue Service – **Independent Office of Appeals.**

///AUTHENTICATION PAGE///

///ASK ALL///

///REQUIRE RESPONSE///

INTRO1. Welcome to the 2021 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.

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Your responses have been saved. When you're ready to continue the survey, please return to www.IRSAppealsSurvey.com and enter your unique password. You'll then be taken to the point where you left off.

///ASK ALL///

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

///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///

POATP. For this survey, please think about the case concerning [TPNAMECLEAN].

- 01 CONTINUE

///ASK IF Q1=01 or 02 or 03///

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

///ASK IF Q1=01 or 02 or 03///

Q2. 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
- 04 Disagree

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05 Strongly disagree

///ASK IF Q1=01 or 02 or 03///

Q3. 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

Q4. 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 IF Q1=01 or 02 or 03///

Q5. 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 IF Q1=01 or 02 or 03///

Q6. 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 IF Q1=01 or 02 or 03///

Q7. 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 IF Q1=01 or 02 or 03///

Q8. 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 IF Q1=01 or 02 or 03///

Q9. 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 IF Q1=01 or 02 or 03///

Q10. Did the Appeals Officer explain how they are separate from the rest of IRS?

- 01 Yes
- 02 No

///ASK IF Q1=01 or 02 or 03///

Q11. 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

///ASK IF Q1=01 or 02 or 03///

Q12. Did the Appeal Officer consider your side of the dispute?

- 01 Yes
- 02 No

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///ASK IF Q1=01 or 02 or 03///

Q13. Was the Appeals Officer professional?

- 01 Yes
- 02 No

///ASK IF Q1=01 or 02 or 03///

Q14. 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//

///ASK IF Q1=01 or 02 or 03///

Q15. 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

///COMPLETE PAGE///

CLOSING COMMENTS

///ASK IF Q1=01 or 02 or 03///

CLOSING. The Independent Office of Appeals and ICF appreciate your time and feedback. If you have questions about this survey, please feel free to email us at IRSAppealsSurvey@icfsurvey.com. or call the help line at 800-427-4275.