

IRS Customer Experience Survey Automated Underreporter (AUR)

In an effort to improve its services to the public, the IRS is seeking the opinions of taxpayers who received a notice from the IRS pointing out a possible discrepancy on their tax return. Please assist us by completing this brief voluntary survey, which should take less than 5 minutes of your time. Fors Marsh will keep your identity private to the extent permitted by law. If you have any questions about this survey, you may call the Survey Helpline at 1-800-521-7177.

1 Thinking of your experience with the process of resolving this possible discrepancy with the IRS, *regardless of whether you agreed or disagreed with the final outcome*, please mark the option that best represents your experiences throughout the resolution process.

Please rate your satisfaction with the following:

	Very Dissatisfied ▼	Somewhat Dissatisfied ▼	Neither Satisfied Nor Dissatisfied ▼	Somewhat Satisfied ▼	Very Satisfied ▼	Not Applicable ▼
a. Overall, the way the IRS handled your possible discrepancy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. How well the initial IRS letter explained what the possible discrepancies were on your tax return	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. How clearly the initial IRS letter explained what documents you needed to send to the IRS	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. How well the IRS letter explained why we did (or did not) accept your documents/explanation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
e. How well the IRS kept you informed of the status of your case	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
f. The consistency of information provided to you by the IRS throughout the process	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
g. How well the final IRS letter explained the resolution of your case	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
h. The length of the process to resolve your possible discrepancy from when you were notified until it was resolved	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

2 If you answered “Very Dissatisfied” or “Somewhat Dissatisfied” to any of the above questions, can you describe what caused you to feel that way?

3 Did you call the IRS about your possible discrepancy using a telephone number listed on any of the letters?

- Yes (continue to 4)
- No (skip to 5)
- Don't recall (skip to 5)

	Very Dissatisfied ▼	Somewhat Dissatisfied ▼	Neither Satisfied Nor Dissatisfied ▼	Somewhat Satisfied ▼	Very Satisfied ▼	Not Applicable ▼
4 Regardless of the outcome of your case, how satisfied were you with the service you received on these calls?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

5 During the process to resolve your possible discrepancy, approximately how many times did you contact the IRS? (Please enter zero if you did not contact the IRS by this method.)

Mail → _____ Times Telephone → _____ Times Fax → _____ Times

6 When you were first notified of the possible discrepancy, how many months did you expect it would take to resolve?

_____ Months

7 Was the actual amount of time...?

- Shorter than you expected
- About equal to your expectations
- Longer than you expected

Please continue on back

8 How much do you agree with the following statements?

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Not Applicable
a. I received an adequate description of the process to resolve my possible discrepancy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. My experience reflected the described process	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. I had the opportunity to provide information important to my case	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. I was treated with respect during the process	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

9 Overall, how well did the IRS meet your expectations while handling the possible discrepancy?

Much better than expected
 Better than expected
 As expected
 Worse than expected
 Much worse than expected

↳ If you answered "Worse than expected" or "Much worse than expected" to the above question, can you describe what caused you to feel that way?

10 Who prepared your taxes? (Mark only one.)

You
 Professional tax preparer
 Friend or relative
 IRS service representative at an IRS office
 Volunteer (at a volunteer tax preparation location)
 Other

11 Who was involved in resolving this discrepancy?

a. A tax professional assisted me Yes No
 b. I represented myself Yes No

12 Are you...

The taxpayer
 A tax professional who represented the taxpayer
 Someone else who assisted the taxpayer

13 The IRS continually looks for ways to improve its service to taxpayers who have received a notice pointing out a possible discrepancy on their tax return. Please use this space to provide your comments or suggestions for improvement. We welcome your feedback.

➡ Occasionally, the IRS conducts additional in-depth research on tax-related issues. Research participants may receive a small monetary incentive to participate depending on the research. If you are interested in participating in future research, please provide us with your telephone number and e-mail address (if available). This information will not be shared with the IRS and will be used only for the purpose of this research.

Telephone number: (___ ___) ___ ___ - ___ ___ E-mail address: _____

If you have been unable to resolve any specific problems with your tax matter through the normal IRS channels, or now face a significant hardship due to the application of the tax law, we encourage you to contact the Taxpayer Advocate Service at 1-877-777-4778.

Paperwork Reduction Act Notice

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is 1545-2250. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to the, Internal Revenue Service, Special Services Section, SE:W:CAR:MP:T:M:S, Room 6129, 1111 Constitution Ave. NW, Washington, DC 20224.

Thank you for completing the survey.
Please return this survey to Fors Marsh, PO Box 5703, Hopkins, MN 55343-5703