

# IRS WAGE & INVESTMENT CUSTOMER SATISFACTION ACCOUNTS MANAGEMENT/ADJUSTMENTS

The IRS is trying to improve the service it provides taxpayers. You can help in this important mission by answering the questions below. This voluntary survey should take less than 7 minutes to complete. Your responses will be kept as anonymous as allowed by law to the IRS. If you have any questions about this survey, you may call the Survey Helpline at 1-888-461-8974 or email them at [irssurvey@icf.com](mailto:irssurvey@icf.com).

The following survey is concerned with any adjustments made to your originally filed tax return. These include the submission of correspondence, a second 1040, 1040X, 1040EZ, 1040A, or any adjustment to your originally filed tax return.

### Privacy Act and Paperwork Reduction Act Notice

Our authority for requesting information with this survey is 5 U.S.C. Section 301, and 26 U.S.C. Sections 7801, 7803, and 7805. The information you provide allows the IRS to analyze interactions between the IRS and taxpayers. This information will also help us to improve taxpayer service.

Data collected will be shared with IRS staff, but your responses will be used for research and aggregate reporting purposes only and will not be used for other non-statistical or non-research purposes. The information that you provide will be protected as required by law. We estimate that it will take 7 minutes to complete this survey, including the time for reviewing instructions and completing the collection of information. Providing the information is voluntary; not providing all or part of the information requested will have no impact on you but may reduce our ability to address taxpayer concerns regarding taxpayer service.

We may not conduct or sponsor, and you are not required to respond to, a collection of information unless it displays a valid OMB control number. The OMB number for this survey is 1545-2250. Send comments regarding this burden estimate for completing the survey or any other aspect of this collection of information, including suggestions for reducing this burden to: IRS, Special Services Section, SE:W:CAR:MP:T:M:SP, Room 6129, 1111 Constitution Avenue, NW, Washington, DC 20224.

<b>1</b>	<b>Do you recall having written contact with the IRS regarding your tax return within the last 365 days?</b>	<input type="radio"/> Yes <a href="#">(Reply to question 2)</a> <input type="radio"/> No <a href="#">(Skip to question 3)</a>												
<b>2</b>	<b>Was the first contact made by you or by the IRS?</b>	<input type="radio"/> By me <input type="radio"/> By the IRS												
<b>3</b>	<b>Did you file an amended return to the IRS within the last year?</b>	<input type="radio"/> Yes <a href="#">(Reply to question 4)</a> <input type="radio"/> No, I did not file an amended return <a href="#">(Skip to question 5)</a>												
<b>4</b>	<b>Did you file the amended return because a notice or letter from the IRS instructed you to do so?</b>	<input type="radio"/> Yes, the notice prompted me to file an amended return <input type="radio"/> No, I filed an amended return, but not because I received a notice or letter												
<b>5</b>	<b>Regardless of whether you agree or disagree with the outcome, how would you rate your overall satisfaction with the way your issue was handled?</b>	<table style="width: 100%; text-align: center; border-collapse: collapse;"> <tr> <td style="width: 16.6%;">Very Dissatisfied</td> <td style="width: 16.6%;">Somewhat Dissatisfied</td> <td style="width: 16.6%;">Neither Satisfied nor Dissatisfied</td> <td style="width: 16.6%;">Somewhat Satisfied</td> <td style="width: 16.6%;">Very Satisfied</td> <td style="width: 16.6%;">Not Applicable</td> </tr> <tr> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> <td>NA</td> </tr> </table>	Very Dissatisfied	Somewhat Dissatisfied	Neither Satisfied nor Dissatisfied	Somewhat Satisfied	Very Satisfied	Not Applicable	1	2	3	4	5	NA
Very Dissatisfied	Somewhat Dissatisfied	Neither Satisfied nor Dissatisfied	Somewhat Satisfied	Very Satisfied	Not Applicable									
1	2	3	4	5	NA									
<b>For the following questions, please focus on the outcome of the issue you recently resolved with the IRS.</b>														
<b>6</b>	<b>How satisfied were you...</b>	<table style="width: 100%; text-align: center; border-collapse: collapse;"> <tr> <td style="width: 16.6%;">Very Dissatisfied</td> <td style="width: 16.6%;">Somewhat Dissatisfied</td> <td style="width: 16.6%;">Neither Satisfied nor Dissatisfied</td> <td style="width: 16.6%;">Somewhat Satisfied</td> <td style="width: 16.6%;">Very Satisfied</td> <td style="width: 16.6%;">Not Applicable</td> </tr> <tr> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> <td>NA</td> </tr> </table>	Very Dissatisfied	Somewhat Dissatisfied	Neither Satisfied nor Dissatisfied	Somewhat Satisfied	Very Satisfied	Not Applicable	1	2	3	4	5	NA
Very Dissatisfied	Somewhat Dissatisfied	Neither Satisfied nor Dissatisfied	Somewhat Satisfied	Very Satisfied	Not Applicable									
1	2	3	4	5	NA									
	A. With the outcome of your recent issue with the IRS?													
	B. That your outcome was appropriate based on information you provided the IRS?													

For the next set of questions, **regardless of your satisfaction with the outcome** of your issue, please focus on the **process and procedures** that the IRS used to address and resolve your issue.

How satisfied were you with the...		Very Dissatisfied	Somewhat Dissatisfied	Neither Satisfied nor Dissatisfied	Somewhat Satisfied	Very Satisfied	Not Applicable
7	A. Ease of getting more information about your issue from the IRS?	1	2	3	4	5	⌵
	B. Ease of providing information requested by the IRS?	1	2	3	4	5	⌵
	C. Length of time it took to resolve the issue?	1	2	3	4	5	⌵
	D. Extent to which the IRS used accurate information about you to process your issue?	1	2	3	4	5	⌵

For the next set of questions, **regardless of your satisfaction with the outcome** of your issue, please focus on the **clarity and timeliness of the information** regarding your issue that was provided by the IRS.

How satisfied were you with the...		Very Dissatisfied	Somewhat Dissatisfied	Neither Satisfied nor Dissatisfied	Somewhat Satisfied	Very Satisfied	Not Applicable
8	A. Ease of understanding the initial notice and what was requested of you?	1	2	3	4	5	⌵
	B. Completeness of instructions you received for resolving your issue?	1	2	3	4	5	⌵
	C. Ease of understanding responses from the IRS?	1	2	3	4	5	⌵
	D. IRS keeping you informed about the status of your case?	1	2	3	4	5	⌵
	E. Explanation regarding the resolution of your issue?	1	2	3	4	5	⌵

For the next set of questions, **regardless of your satisfaction with the outcome** of your issue, please focus on the **personal treatment** you received throughout the process of resolving your issue.

How satisfied were you with the...		Very Dissatisfied	Somewhat Dissatisfied	Neither Satisfied nor Dissatisfied	Somewhat Satisfied	Very Satisfied	Not Applicable
9	A. Tone of the written IRS correspondence concerning your issue?	1	2	3	4	5	⌵
	B. Politeness of any individuals you spoke with at the IRS concerning your issue?	1	2	3	4	5	⌵

If you were 'very dissatisfied' or 'dissatisfied' with any of the aspects in questions 5-9 above, please provide a brief explanation of why you gave this rating in the box provided.

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Please mark the topic that best describes your main issue.

- 1 Status of refund
- 2 Status of payment
- 3 Penalty/Interest charges
- 4 Earned income credit
- 5 Exemptions/Dependents
- 6 Name/Address changes
- 7 Credits (child care, education, etc.)
- 8 Identity theft
- 9 Other changes or attachments to original return not specified in list

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For this recent interaction, how many days elapsed between the time you submitted your correspondence or amended return and the time you received a reply?

- 1 Less than 15 days
- 2 15-29 days
- 3 30-44 days
- 4 45-60 days
- 5 Over 60 days
- 6 Did not receive a reply

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What do you think is a reasonable time frame to wait for the IRS to respond to your issue?

- 1 Less than 15 days
- 2 15-29 days
- 3 30-44 days
- 4 45-60 days
- 5 Over 60 days

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Was your issue with the IRS completely resolved?

- 1 Yes
- 2 No (Skip to question 16)
- 3 Not Sure (Skip to question 16)

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How many days did it take to resolve your issue from the time you contacted, or were contacted by, the IRS about this issue?

- 1 Less than 15 days
- 2 15-29 days
- 3 30-44 days
- 4 45-60 days
- 5 Over 60 days

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Who represented you while resolving your issue?

	Yes	No
A. A tax professional	<input type="radio"/> 1	<input type="radio"/> 2
B. Yourself	<input type="radio"/> 1	<input type="radio"/> 2
C. An individual with tax knowledge	<input type="radio"/> 1	<input type="radio"/> 2
D. Other (Please specify) _____	<input type="radio"/> 1	<input type="radio"/> 2

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Did you use any of the following methods to contact the IRS about this issue?

	Yes	No
A. Email	<input type="radio"/> 1	<input type="radio"/> 2
B. Mail	<input type="radio"/> 1	<input type="radio"/> 2
C. Toll-free line	<input type="radio"/> 1	<input type="radio"/> 2
D. In person	<input type="radio"/> 1	<input type="radio"/> 2
E. Other (Please specify) _____	<input type="radio"/> 1	<input type="radio"/> 2

18 Have you contacted the IRS about the same issue for any prior year's tax return?   
 ① Yes   
 ② No (Skip to question 20)

19 How would you rate the level of service received from this contact versus previous contacts?   
 ① Better   
 ② Worse   
 ③ The same

20 Regardless of the outcome of your case, how much do you agree with the following statements?

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Not Applicable
A. I received a clear description of the Adjustments process	①	②	③	④	⑤	⬆️
B. My experience reflected the described Adjustments process	①	②	③	④	⑤	⬆️
C. I had the opportunity to provide information important to my case	①	②	③	④	⑤	⬆️
D. I was treated with respect during the Adjustments process	①	②	③	④	⑤	⬆️

21 Overall, how well did the IRS meet your expectations while handling your Adjustments case?   
 ① Much Worse Than Expected   
 ② Worse Than Expected   
 ③ As Expected   
 ④ Better Than Expected   
 ⑤ Much Better Than Expected

22 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? \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Occasionally, we conduct additional in-depth IRS-related research. 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 your email address (if available). This information will not be shared with the IRS and will be used only for the purpose of survey research.

Phone Number: \_\_\_\_\_ Email Address: \_\_\_\_\_

23 Use this space for comments or suggestions for improvements. \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Thank you for completing the survey.  
 Please return the questionnaire to  
 ICF  
 980 Beaver Creek Drive  
 Martinsville, VA 24112



980 BEAVER CREEK DRIVE  
MARTINSVILLE, VA 24112

## Do We Have Your Input Yet?

Recently, you received a survey asking your opinions about the service you received from the IRS in a recent contact. **If you have already completed and returned the survey, please accept our sincere thanks.** If not, please take a few minutes to complete it and return it today. We want to be sure we have your opinions and suggestions.

If you did not receive the survey, or it got misplaced, please call 1-888-461-8974 or email us at [irssurvey@icf.com](mailto:irssurvey@icf.com).

Sincerely,

*Kristen Flaherty*  
Kristen Flaherty  
Project Manager  
ICF