

IRS WAGE & INVESTMENT CUSTOMER SATISFACTION INJURED SPOUSE

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 1-800-521-7177. Thank you for sharing your experiences with us.

1	Regardless of whether you agree or disagree with the final outcome, how would you rate your overall satisfaction with the <u>service</u> received from the IRS about your most recent Injured Spouse filing (Form 8379)?	Very Dissatisfied 1	Dissatisfied 2	Neither Satisfied nor Dissatisfied 3	Satisfied 4	Very Satisfied 5
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Regardless of whether you agree or disagree with the final outcome of your most recent Injured Spouse filing, please rate your <u>satisfaction</u> with the following:							
How satisfied were you with the...							
2		Very Dissatisfied	Dissatisfied	Neither Satisfied nor Dissatisfied	Satisfied	Very Satisfied	Did Not Complete Form 8379 Myself
	A. Ease of finding out about the Injured Spouse program	1	2	3	4	5	
	B. Ease of understanding the Injured Spouse process	1	2	3	4	5	
	C. Ease of completing the Injured Spouse Form 8379	1	2	3	4	5	NA
	D. Length of time it took to receive your outcome after submitting the Form 8379	1	2	3	4	5	
	E. Ease of understanding the IRS's decision about your Injured Spouse filing	1	2	3	4	5	

3	What type of letter or notice prompted your most recent Injured Spouse filing? (Please mark one) 1 A letter stating the IRS used all or part of your refund to pay a tax debt. 2 A letter stating that the Bureau of Fiscal Service used all or part of your refund to pay past due child or spousal support, federal non-tax debt (student loans), or state income tax obligation. 3 Other (Please specify): _____ 4 Did not receive a notice
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4	What type of debt issue caused your most recent Injured Spouse filing? (Please mark one) 1 Federal tax debt issue 2 Non-Federal tax debt issue (e.g., child support, student loans, state income tax obligations) 3 Both (Federal tax and non-Federal tax debt)
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How did you find out about the Injured Spouse program?			
		Yes	No
5	A. Letter or Notice	1	2
	B. IRS Customer Service Representative	1	2
	C. IRS Taxpayer Advocate Office	1	2
	D. IRS website (IRS.gov)	1	2
	E. Non-IRS website	1	2
	F. Family/Friend/Colleague	1	2
	G. Tax professional (e.g., Attorney, CPA)	1	2
	H. Tax software	1	2
	I. Other source (Please specify): _____	1	2

6	Did you visit the IRS website (IRS.gov) to get any help or information about Injured Spouse?	1 Yes	Continue to Question 7
		2 No	Skip to Question 8

For each of the following tasks, please mark if you used IRS.gov and mark if you found what you were looking for.

IRS.gov Tasks:

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- A. Get a description of the Injured Spouse process
- B. Determine if I qualified for Injured Spouse assistance
- C. Get the Injured Spouse Form 8379
- D. Get Instructions for the Injured Spouse Form 8379
- E. Get help preparing Form 8379
- F. Get a status update about my Injured Spouse filing
- G. Get help understanding the IRS's final decision about my Injured Spouse filing
- H. Other (Please specify):

Used IRS.gov?		If Yes, please continue	Found it on IRS.gov?	
No (go to next row)	Yes		No	Yes
0	1	→	0	1
0	1	→	0	1
0	1	→	0	1
0	1	→	0	1
0	1	→	0	1
0	1	→	0	1
0	1	→	0	1
0	1	→	0	1

Who prepared your most recent Injured Spouse filing (Form 8379)? (Please mark one)

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- 1 Yourself/Spouse
- 2 Tax professional (e.g., Attorney, CPA)
- 3 Volunteer Income Tax Assistance (VITA)
- 4 Friend/Relative
- 5 Other (Please specify):

Approximately how many weeks did you expect the Injured Spouse process to take?

9

WEEKS

Approximately how many weeks did it take to receive the outcome of your Injured Spouse filing?

10

WEEKS

How did you submit your most recent Injured Spouse filing (Form 8379)? (Please mark one)

11

- 1 With your original tax return
- 2 After your refund was applied to a debt
- 3 With Form 1040-X (e.g., Amended Individual Tax Return)

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Did the IRS ask you to submit additional information for your Injured Spouse filing?

- 1 Yes
- 2 No

13

Did you call the IRS regarding your Injured Spouse filing?

- 1 Yes
- 2 No

Continue to Question 14
Skip to Question 19

Did you call the IRS for ANY of the following reasons?

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Reasons for Calling:

- A. For help preparing the Injured Spouse Form 8379
- B. For status update(s) about my filing
- C. To submit additional information for my filing
- D. For an explanation of the IRS's decision about my filing

Called IRS for this Reason?	Total Number of Times You Called IRS? (1, 2, 3, ...)	Number of Times You Spoke with Someone at IRS? (1, 2, 3, ...)	Were <u>All</u> Your Questions Answered the <u>1st</u> Time You Spoke with Someone at IRS?	
			No	Yes
No (go to next row) Yes			0 1	0 1
0 1	→		0 1	0 1
0 1	→		0 1	0 1
0 1	→		0 1	0 1

If you called the IRS and the reason for your call is not listed in Questions 14A-D, please tell us why you called the IRS. **IF YOU DID NOT CALL THE IRS PLEASE SKIP TO QUESTION 19.**

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What was your **most recent** Injured Spouse call to the IRS about? (Please mark one)

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- ① To get help preparing Form 8379
- ② To get a status update about my filing
- ③ To submit additional information
- ④ To get an explanation of the IRS's final decision about my filing
- ⑤ Other reason

Regarding your **most recent Injured Spouse call** to the IRS, please rate your **satisfaction** with the following aspects of telephone service:

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	Very Dissatisfied	Dissatisfied	Neither Satisfied nor Dissatisfied	Satisfied	Very Satisfied
A. Ease of getting through to an IRS representative	①	②	③	④	⑤
B. Representative's willingness to help	①	②	③	④	⑤
C. Professionalism of the representative	①	②	③	④	⑤
D. Knowledge of the representative	①	②	③	④	⑤
E. Clarity of the information you received	①	②	③	④	⑤

If you answered "Very Dissatisfied" or "Dissatisfied" to any of the questions above (Questions 17A-E), please describe why.

18

What was the **final outcome** of your Injured Spouse filing? (Please mark one)

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- ① Full refund (as claimed on your tax return)
- ② Partial refund (Injured Spouse's share of the refund)
- ③ No payment (refund was offset)
- ④ Case was denied

Regardless of whether you agree or disagree with the final outcome of your most recent Injured Spouse filing, please **rate your agreement** with the following statements:

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	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
A. I had an adequate description of the Injured Spouse process	①	②	③	④	⑤
B. My experience reflected the described Injured Spouse 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 Injured Spouse process	①	②	③	④	⑤
E. The outcome was reasonable given what I provided to the IRS	①	②	③	④	⑤

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

22 If you answered "Much Worse Than Expected" or "Worse Than Expected" above (Question 21), please describe why.

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

Thank you for completing the survey.
Please return the questionnaire to
250 W. Old Wilson Bridge Rd. Suite 340
Worthington, OH 43085-5200

***Paperwork Reduction Act Notice.** The Paperwork Reduction Act requires that the IRS provide an OMB control number relating to all public information requests along with the address where you can send comments regarding the survey. The OMB number for this survey is 1545-2250. If you have any comments regarding this survey, please write to: IRS, Special Services Section, SE:W:CAR:MP:T:M:S - Room 6129, 1111 Constitution Avenue, NW, Washington, DC 20224*

Privacy Statement:
 The authority requesting the information is 5 USC 301. The primary purpose of asking for the information is to determine steps IRS can take to improve our service to you. The information may be disclosed as authorized by the routine uses published for the Privacy Act System of Records entitled, Treas/IRS 00.001 Correspondence Files, including Stakeholder Partnership File, and Correspondence Control Files, as published in the Federal Register: December 10, 2011 (Volume 66, Number 237) [Notices] pages 63785-6. Providing the information is voluntary. Not answering some or all of the questions will not affect you.



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SUITE 340
WORTHINGTON, OH 43085-5022



Do We Have Your Input Yet?

Recently, we sent you a survey asking about your opinions and experiences regarding your IRS case. If you have already completed and submitted the questionnaire, please accept my 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 questionnaire, or need a replacement, please call us at 1-800-521-7177.

Sincerely,

Brian K. Griepentrog, Ph.D.
Director of Research
Fors Marsh Group LLC

Research
conducted by



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GROUP

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