

IRS CUSTOMER SATISFACTION SURVEY

EXCISE TAX AUDIT OR REGISTRATION REVIEW

The IRS is trying to improve its service to the public. You can help in this important mission by answering the following questions. This voluntary survey should take less than 5 minutes to complete. If you have any questions about this survey, you may contact the Survey Helpdesk at SBSE.CXSurvey@irs.gov

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 1545-1432. 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.

The following questions ask your opinion regarding how the IRS handled your most recent Excise Tax audit or Form 637 registration review (i.e., your Excise case). For each question, **regardless of whether you agree or disagree with the final outcome of your case**, please select the response that best represents your opinion.

1. First, think about your experiences **throughout the process of your most recent Excise case**.

a. How satisfied are you with the length of the Excise case process from start to finish?

- Very Dissatisfied
- Somewhat Dissatisfied
- Neither Dissatisfied nor Satisfied
- Somewhat Satisfied
- Very Satisfied
- Don't Know/Not Applicable

b. How satisfied are you with the fairness of treatment during the Excise case?

- Very Dissatisfied
- Somewhat Dissatisfied
- Neither Dissatisfied nor Satisfied
- Somewhat Satisfied
- Very Satisfied
- Don't Know/Not Applicable

c. How satisfied are you with how well the IRS kept you informed of the status of your case?

- Very Dissatisfied
- Somewhat Dissatisfied
- Neither Dissatisfied nor Satisfied
- Somewhat Satisfied
- Very Satisfied
- Don't Know/Not Applicable

2. Next, consider **your interactions with the auditor and other IRS employees.**
- a. How satisfied are you with the professionalism of your auditor or reviewer?
- Very Dissatisfied
 - Somewhat Dissatisfied
 - Neither Dissatisfied nor Satisfied
 - Somewhat Satisfied
 - Very Satisfied
 - Don't Know/Not Applicable
- b. How satisfied are you with the time your auditor or reviewer took to respond to your questions?
- Very Dissatisfied
 - Somewhat Dissatisfied
 - Neither Dissatisfied nor Satisfied
 - Somewhat Satisfied
 - Very Satisfied
 - Don't Know/Not Applicable
- c. How satisfied are you with IRS communication with you throughout the Excise case process?
- Very Dissatisfied
 - Somewhat Dissatisfied
 - Neither Dissatisfied nor Satisfied
 - Somewhat Satisfied
 - Very Satisfied
 - Don't Know/Not Applicable
- d. How satisfied are you with the manager's effect on your Excise case, if you communicated with the manager?
- Very Dissatisfied
 - Somewhat Dissatisfied
 - Neither Dissatisfied nor Satisfied
 - Somewhat Satisfied
 - Very Satisfied
 - Don't Know/Not Applicable
3. Now, please think about **the information that the IRS provided to you** about your most recent Excise case.
- a. Please rate your satisfaction with the explanation of how long the Excise case process would take from start to finish.
- Very Dissatisfied
 - Somewhat Dissatisfied

- Neither Dissatisfied nor Satisfied
- Somewhat Satisfied
- Very Satisfied
- Don't Know/Not Applicable

b. Please rate your satisfaction with the initial information the IRS provided (e.g., letters/notices, phone calls, IRS publications) so that you knew what to expect during the Excise case.

- Very Dissatisfied
- Somewhat Dissatisfied
- Neither Dissatisfied nor Satisfied
- Somewhat Satisfied
- Very Satisfied
- Don't Know/Not Applicable

c. Please rate your satisfaction with the explanation of why more information was needed after the initial appointment/contact.

- Very Dissatisfied
- Somewhat Dissatisfied
- Neither Dissatisfied nor Satisfied
- Somewhat Satisfied
- Very Satisfied
- Don't Know/Not Applicable

d. Please rate your satisfaction with the consideration given to the information you provided.

- Very Dissatisfied
- Somewhat Dissatisfied
- Neither Dissatisfied nor Satisfied
- Somewhat Satisfied
- Very Satisfied
- Don't Know/Not Applicable

e. Please rate your satisfaction with the explanation of the final decision for your Excise case, including any changes made.

- Very Dissatisfied
- Somewhat Dissatisfied
- Neither Dissatisfied nor Satisfied
- Somewhat Satisfied
- Very Satisfied
- Don't Know/Not Applicable

4. Which of the following best describes **your most recent Excise case**?

- Excise Tax audit (*If selected, answer Q6 only*)
- Form 637 registration review (*If selected, answer Q5 only*)
- Both an Excise Tax audit and Form 637 registration review (*If selected, answer Q5 and Q6*)

5. Think about **your initial application for a Form 637 registration and the application process.**

a. Please rate your satisfaction with the ease of filling out Form 637, Excise Tax Application for Registration.

- Very Dissatisfied
- Somewhat Dissatisfied
- Neither Dissatisfied nor Satisfied
- Somewhat Satisfied
- Very Satisfied
- Don't Know/Not Applicable

b. Please rate your satisfaction with the length of time it took from when you submitted your registration application to your first appointment/contact with an auditor or reviewer.

- Very Dissatisfied
- Somewhat Dissatisfied
- Neither Dissatisfied nor Satisfied
- Somewhat Satisfied
- Very Satisfied
- Don't Know/Not Applicable

c. Please rate your satisfaction with the length of time it took from your first appointment/contact with an auditor or reviewer to when you received the letter of approval or denial.

- Very Dissatisfied
- Somewhat Dissatisfied
- Neither Dissatisfied nor Satisfied
- Somewhat Satisfied
- Very Satisfied
- Don't Know/Not Applicable

6. Now, think about **your Excise tax audit.**

a. Please rate your satisfaction with the explanation of the reason(s) for the audit.

- Very Dissatisfied
- Somewhat Dissatisfied
- Neither Dissatisfied nor Satisfied
- Somewhat Satisfied
- Very Satisfied
- Don't Know/Not Applicable

b. Please rate your satisfaction with the explanation of your payment options, if there was a change.

- Very Dissatisfied
- Somewhat Dissatisfied

- Neither Dissatisfied nor Satisfied
- Somewhat Satisfied
- Very Satisfied
- Don't Know/Not Applicable

- c. Please rate your satisfaction with the information provided to you on how to appeal the audit findings if you did not agree.
- Very Dissatisfied
 - Somewhat Dissatisfied
 - Neither Dissatisfied nor Satisfied
 - Somewhat Satisfied
 - Very Satisfied
 - Don't Know/Not Applicable
7. During your Excise case, did you do any of the following? (*Select all that apply*)
- Received documents electronically (*Skip to Q9*)
 - Sent documents electronically (*Continue to Q8*)
 - None of the above (*Skip to Q9*)
8. Please rate your satisfaction with **sending documents electronically**.
- Very Dissatisfied
 - Somewhat Dissatisfied
 - Neither Dissatisfied nor Satisfied
 - Somewhat Satisfied
 - Very Satisfied
9. Regardless of whether you agree or disagree with the final outcome, how would you rate your **overall satisfaction with the way your Excise case was handled?**
- Very Dissatisfied
 - Somewhat Dissatisfied
 - Neither Dissatisfied nor Satisfied
 - Somewhat Satisfied
 - Very Satisfied
 - Don't Know/Not Applicable
10. a. Did you **request any changes** with regard to your Excise case? [Example: requested a suspension of the audit/review]
- Yes (*If selected, continue to Q10b*)
 - No (*If selected, skip to Q11*)
- b. If a change was requested, what was the reason for your request?
11. With regard to this Excise case, are you...
- The taxpayer (*If selected, continue to Q12*)
 - A tax professional who represented the taxpayer (*If selected, skip to Q14*)
 - Someone else who represented the taxpayer (*If selected, skip to Q14*)
12. If you are the taxpayer, did you...

- Use a tax professional to represent you for this Excise case
- Represent yourself
- Both

13. Rate your level of agreement with: This interaction **increased my trust** in the IRS.

- Strongly Disagree
- Somewhat Disagree
- Neither Disagree nor Agree
- Somewhat Agree
- Strongly Agree

14. Please provide any comments or suggestions for improvement.

15. Occasionally, we conduct additional in-depth research with taxpayers. Are you interested in participating in additional research?

- Yes (Continue to Q16)
- No (Skip to Survey End)

16. Please provide us with your name, telephone number and email address. This information will not be shared outside of IRS Research and will only be used for the purpose of survey research.

- Name:
- Telephone Number (Numeric only):
- Email Address:

Thank you for completing the survey.