



## **Introduction**

The IRS is working 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.

The survey asks about any adjustments made to your originally filed tax return. This includes sending additional correspondence, a second 1040, 1040X, 1040A, or any adjustment to your originally filed tax return.

## **Privacy Notice**

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 1545-2290.** 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.

## Starting the Adjustment Process

Q1. Did the IRS make first contact about your issue?

- ☐ Yes
- ☐ No

Q2. Did you file an amended return? This includes sending additional correspondence, a second 1040, 1040X, 1040A, 941, 941X, or any adjustment to your originally filed tax return.

- ☐ Yes
- ☐ No

Q3. Did you receive a notice from the IRS?

- ☐ Yes
- ☐ No

## Contacting the IRS and Issue Outcome

Q4. Did you write to the IRS regarding your issue within the last 365 days (i.e. mailed a letter, email)?

- ☐ Yes
- ☐ No

Q5. Did you call into the IRS about your issue within the last 365 days?

- ☐ Yes
- ☐ No

Q6. Did you go to an IRS Taxpayer Assistance Center about your issue within the last 365 days?

- ☐ Yes
- ☐ No

How much do you agree or disagree with the following statements?

Q7. Regardless of the outcome of my case, I am satisfied with the way the IRS handled my issue.

- ☐ Strongly agree
- ☐ Mostly agree
- ☐ Neither agree nor disagree
- ☐ Mostly disagree
- ☐ Strongly disagree
- ☐ Not applicable

Q8. I am satisfied with the outcome of my recent issue with the IRS.

- ☐ Strongly agree
- ☐ Mostly agree
- ☐ Neither agree nor disagree
- ☐ Mostly disagree
- ☐ Strongly disagree
- ☐ Not applicable

Q9. My outcome was appropriate.

- ☐ Strongly agree
- ☐ Mostly agree
- ☐ Neither agree nor disagree
- ☐ Mostly disagree
- ☐ Strongly disagree
- ☐ Not applicable

**Obtaining and providing information**

Q10. It was easy to get information about my issue from the IRS.

- ☐ Strongly agree
- ☐ Mostly agree
- ☐ Neither agree nor disagree
- ☐ Mostly disagree
- ☐ Strongly disagree
- ☐ Not applicable

Q11. It was easy to provide information requested by the IRS.

- ☐ Strongly agree
- ☐ Mostly agree
- ☐ Neither agree nor disagree
- ☐ Mostly disagree
- ☐ Strongly disagree
- ☐ Not applicable

Q12. The IRS used accurate information to process my issue.

- ☐ Strongly agree
- ☐ Mostly agree
- ☐ Neither agree nor disagree

- ☐ Mostly disagree
- ☐ Strongly disagree
- ☐ Not applicable

Q13. The notices from the IRS were easy to understand.

- ☐ Strongly agree
- ☐ Mostly agree
- ☐ Neither agree nor disagree
- ☐ Mostly disagree
- ☐ Strongly disagree
- ☐ Not applicable

Q14. I was able to follow the instructions I received from the IRS to resolve my issue.

- ☐ Strongly agree
- ☐ Mostly agree
- ☐ Neither agree nor disagree
- ☐ Mostly disagree
- ☐ Strongly disagree
- ☐ Not applicable

### **The Adjustment Process**

Q15. The IRS provided a clear description of the adjustments process.

- ☐ Strongly agree
- ☐ Mostly agree
- ☐ Neither agree nor disagree
- ☐ Mostly disagree
- ☐ Strongly disagree
- ☐ Not applicable

Q16. My experience matched how the IRS described the adjustments process.

- ☐ Strongly agree
- ☐ Mostly agree
- ☐ Neither agree nor disagree
- ☐ Mostly disagree
- ☐ Strongly disagree
- ☐ Not applicable

Q17. It was easy to understand responses from the IRS.

- ☐ Strongly agree
- ☐ Mostly agree
- ☐ Neither agree nor disagree
- ☐ Mostly disagree
- ☐ Strongly disagree
- ☐ Not applicable

Q18. The IRS kept me informed about the status of my case.

- ☐ Strongly agree
- ☐ Mostly agree
- ☐ Neither agree nor disagree
- ☐ Mostly disagree
- ☐ Strongly disagree
- ☐ Not applicable

Q19. The IRS explained how they resolved my issue.

- ☐ Strongly agree
- ☐ Mostly agree
- ☐ Neither agree nor disagree

- ☐ Mostly disagree
- ☐ Strongly disagree
- ☐ Not applicable

Q20. The IRS employees I interacted with were helpful.

- ☐ Strongly agree
- ☐ Mostly agree
- ☐ Neither agree nor disagree
- ☐ Mostly disagree
- ☐ Strongly disagree
- ☐ Not applicable

Q21. IRS employees always treated me with respect.

- ☐ Strongly agree
- ☐ Mostly agree
- ☐ Neither agree nor disagree
- ☐ Mostly disagree
- ☐ Strongly disagree
- ☐ Not applicable

### **Adjustment Timeframe**

Q22. In 5 sentences or less, please describe the main issue for your adjustments request.

Q23. The length of time it took to resolve my issue was reasonable.

- ☐ Strongly agree

- ☐ Mostly agree
- ☐ Neither agree nor disagree
- ☐ Mostly disagree
- ☐ Strongly disagree
- ☐ Not applicable

Q24. How many days elapsed between the time you submitted your correspondence or amended return and the time you received a reply?

- ☐ Less than 15 days
- ☐ 15-29 days
- ☐ 30-44 days
- ☐ 45-60 days
- ☐ Over 60 days

Q25. What do you think is a reasonable time frame for the IRS to respond?

- ☐ Less than 15 days
- ☐ 15-29 days
- ☐ 30-44 days
- ☐ 45-60 days
- ☐ Over 60 days

### **Issue Resolution**

Q26. My issue was completely resolved.

- ☐ Yes
- ☐ No

Q27. Who helped to resolve your issue? Select as many or as few items as applicable:

- ☐ Myself



- ☐ Friend or family member
- ☐ A tax professional (i.e. Certified Public Accountant)
- ☐ Tax preparation website (i.e. TurboTax, H&R Block)
- ☐ Taxpayer Advocate Services
- ☐ Other

Q28. Have you contacted the IRS about the same issue for any prior year's tax returns?

- ☐ Yes
- ☐ No

Q28A. How would you rate the level of service received from this contact versus previous contacts?

- ☐ Better
- ☐ Worse
- ☐ The same

Q29. How well did the IRS meet your expectations?

- ☐ Far below
- ☐ Below
- ☐ Met expectations
- ☐ Above
- ☐ Far above

