



**IRS WAGE AND INVESTMENT CUSTOMER SATISFACTION SURVEY**  
ACCOUNTS MANAGEMENT/ADJUSTMENTS

January 19, 2018

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Vincent & Shelly T

Parsippany, NJ 07054-



Dear Vincent & Shelly T

A few days ago you received a letter from James P. Clifford, Director, Accounts Management in the Wage and Investment Division of the Internal Revenue Service, asking for your help with an important research project.

We are administering a nationwide survey among people who have had contact with the Internal Revenue Service (IRS). We want to know your opinions about the process of corresponding with the IRS regarding your tax return or filing an amended return. Your responses are critical to the accuracy of this research.

We are sending questionnaires to a random sample of taxpayers who have had such issues. All responses are as anonymous as allowed by law, and your participation is voluntary. We will group your responses with others, so that no individual reply can be traced back to an individual.

The questionnaire is quite brief and should take less than 7 minutes to complete. Please use the postage-paid reply envelope to return your completed questionnaire. If you have any questions or concerns, please feel free to call us toll-free at 1-800-521-7177, or email us at [irssurveyhelp@forsmarshgroup.com](mailto:irssurveyhelp@forsmarshgroup.com).

To verify the authenticity of this survey, please visit [IRS.gov](http://IRS.gov) and enter the search term 'customer surveys'. The IRS Customer Satisfaction Survey page contains a list of valid and current IRS surveys and as of this issuance should provide a reference to Wage & Investment (W&I), Customer Account Services, Adjustments.

The IRS is committed to improving its performance and service to the American public. The first step in this process is to gather reliable information from those who have had contact with IRS services and employees. Your honest opinions will help bring about these changes.

Thank you in advance for your cooperation.

Sincerely,

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



Research conducted by FORSMARSH  
GROUP



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# 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 1-800-521-7177.

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

- 1** Do you recall having written contact with the IRS regarding your tax return within the last 365 days?
- ① Yes (Reply to question 2)  
② No (Skip to question 3)
- 2** Was the first contact made by you or by the IRS?
- ① By me  
② By the IRS
- 3** Did you file an amended return to the IRS within the last year?
- ① Yes (Reply to question 4)  
② No, I did not file an amended return (Skip to question 5)
- 4** Did you file the amended return because a notice or letter from the IRS instructed you to do so?
- ① Yes, the notice prompted me to file an amended return  
② No, I filed an amended return, but not because I received a notice/letter

- 5** Regardless of whether you agree or disagree with the final outcome, how would you rate your overall satisfaction with the way your issue was handled?
- | Very Dissatisfied | Somewhat Dissatisfied | Neither Satisfied nor Dissatisfied | Somewhat Satisfied | Very Satisfied | Not Applicable |
|-------------------|-----------------------|------------------------------------|--------------------|----------------|----------------|
| ①                 | ②                     | ③                                  | ④                  | ⑤              | NA             |

For the following questions, please focus on the outcome of the issue you recently resolved with the IRS.

- 6** How satisfied were you...
- |   | Very Dissatisfied | Somewhat Dissatisfied | Neither Satisfied nor Dissatisfied | Somewhat Satisfied | Very Satisfied | Not Applicable |
|---|-------------------|-----------------------|------------------------------------|--------------------|----------------|----------------|
| A. With the final outcome of your recent issue with the IRS?                    | ①                 | ②                     | ③                                  | ④                  | ⑤              | NA             |
| B. That your outcome was appropriate based on information you provided the IRS? | ①                 | ②                     | ③                                  | ④                  | ⑤              | NA             |

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.

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



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...

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- A. Ease of understanding the initial notice and what was requested of you?
- B. Completeness of instructions you received for resolving your issue?
- C. Ease of understanding responses from the IRS?
- D. IRS keeping you informed about the status of your case?
- E. Explanation regarding the resolution of your issue?

Very Dissatisfied	Somewhat Dissatisfied	Neither Satisfied nor Dissatisfied	Somewhat Satisfied	Very Satisfied	Not Applicable
1	2	3	4	5	NA
1	2	3	4	5	NA
1	2	3	4	5	NA
1	2	3	4	5	NA
1	2	3	4	5	NA

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...

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- A. Tone of the written IRS correspondence concerning your issue?
- B. Politeness of any individuals you spoke with at the IRS concerning your issue?

Very Dissatisfied	Dissatisfied	Neither Satisfied nor Dissatisfied	Satisfied	Very Satisfied	Not Applicable
1	2	3	4	5	NA
1	2	3	4	5	NA

If you were 'very dissatisfied' or 'dissatisfied' with any of the aspects in question 5-8 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.

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- 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

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?

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- 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

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

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

Was your issue with the IRS completely resolved?

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

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

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

Who represented you while resolving your issue?

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- A. A tax professional
- B. Yourself
- C. An individual with tax knowledge
- D. Other (Please specify) \_\_\_\_\_

Yes	No
①	②
①	②
①	②
①	②

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

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- A. Email
- B. Mail
- C. Toll-free line
- D. In person
- E. Other (Please specify) \_\_\_\_\_

Yes	No
①	②
①	②
①	②
①	②
①	②

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

- ① Yes
- ② No (Skip to question 20)

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

- ① Better
- ② Worse
- ③ The same

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

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- A. I received an adequate description of the Adjustments process
- B. My experience reflected the described Adjustments process
- C. I had the opportunity to provide information important to my case
- D. I was treated with respect during the Adjustments process

Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Not Applicable
①	②	③	④	⑤	NA
①	②	③	④	⑤	NA
①	②	③	④	⑤	NA
①	②	③	④	⑤	NA



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Overall, how well did the IRS meet your expectations while handling your Adjustments case?

Much  
Worse Than  
Expected

①

Worse Than  
Expected

②

As  
Expected

③

Better Than  
Expected

④

Much  
Better Than  
Expected

⑤

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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?

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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

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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.

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Use this space for comments or suggestions for improvements.

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**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 the questionnaire to P.O. Box 42048, Arlington, VA 22204-9048 USA.**