



Individual Income Tax Post Audit Surveys

September 14, 2009

Attached are three documents related to the department's individual income tax post audit survey program. The documents include a copy of the post audit survey, a pie chart that illustrates the overall summary of the audit surveys, and a bar chart that shows the individual responses for each survey question.

The two charts summarize surveys received from July 2007 through July 2009. During this two year period approximately 700 surveys were mailed to either the taxpayer or the taxpayer's preparer. Of the 700 surveys, 250 were returned to the department.

The post audit survey is an important part of our review of the department's audit program. The survey provides us with valuable feedback in areas such as: the professionalism of our auditors, how informative was the audit instructions and findings, and was the taxpayer's appeal rights fully communicated.

We use these results to address specific issues related to an individual auditor or an issue that may have been raised regarding the overall audit program.

POST AUDIT SURVEY

**Montana Department of Revenue
Business and Income Taxes Division
PO Box 5805, Helena, MT 59604-5805
Fax: (406) 444-6642**

Taxpayer Name (optional):

Auditor(s):

Audit Date:

The Montana Department of Revenue is continuously seeking ways to improve the services we provide. Please help us evaluate our service by answering the following questions about your recent audit. For each statement below, circle the number that best matches your opinion, using the following scale.

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

- 1 2 3 4 5 NA 1. At the beginning of the audit, I was informed of the information needed and the audit procedures that would be followed.
- 1 2 3 4 5 NA 2. I was given sufficient time to retrieve the information needed for the audit.
- 1 2 3 4 5 NA 3. During the course of the audit, the auditor showed a reasonable understanding of my business and industry.
- 1 2 3 4 5 NA 4. The auditor gave me helpful and accurate information regarding tax laws, regulations and rules pertaining to my organization.
- 1 2 3 4 5 NA 5. The auditor listened to and considered any concerns or questions that I raised during the audit.
- 1 2 3 4 5 NA 6. The auditor treated me with courtesy and respect throughout the audit.
- 1 2 3 4 5 NA 7. The auditor gave me clear, understandable answers to my questions.
- 1 2 3 4 5 NA 8. The audit findings and adjustments were satisfactorily explained to me at the audit's conclusion.
- 1 2 3 4 5 NA 9. The audit was completed within a reasonable period of time.
- 1 2 3 4 5 NA 10. The final audit report was clear, understandable and easy to follow.
- 1 2 3 4 5 NA 11. I understood my appeal rights at the conclusion of the audit.
- 1 2 3 4 5 NA 12. As a result of this audit experience, I have a more positive perception of the auditing unit at the Montana Department of Revenue.

13. Which type of tax did your audit cover?

- | | | |
|--|---|--|
| <input type="checkbox"/> Individual Income | <input type="checkbox"/> Partnership | <input type="checkbox"/> Retail Telecommunications |
| <input type="checkbox"/> Corporate License | <input type="checkbox"/> S-Corporation | <input type="checkbox"/> Mineral Royalty Withholding |
| <input type="checkbox"/> Cigarette/Tobacco | <input type="checkbox"/> Natural Resource | <input type="checkbox"/> Unclaimed Property |
| <input type="checkbox"/> Rental Vehicle | <input type="checkbox"/> Lodging Facilities | <input type="checkbox"/> Other _____ |

Additional Comments: _____

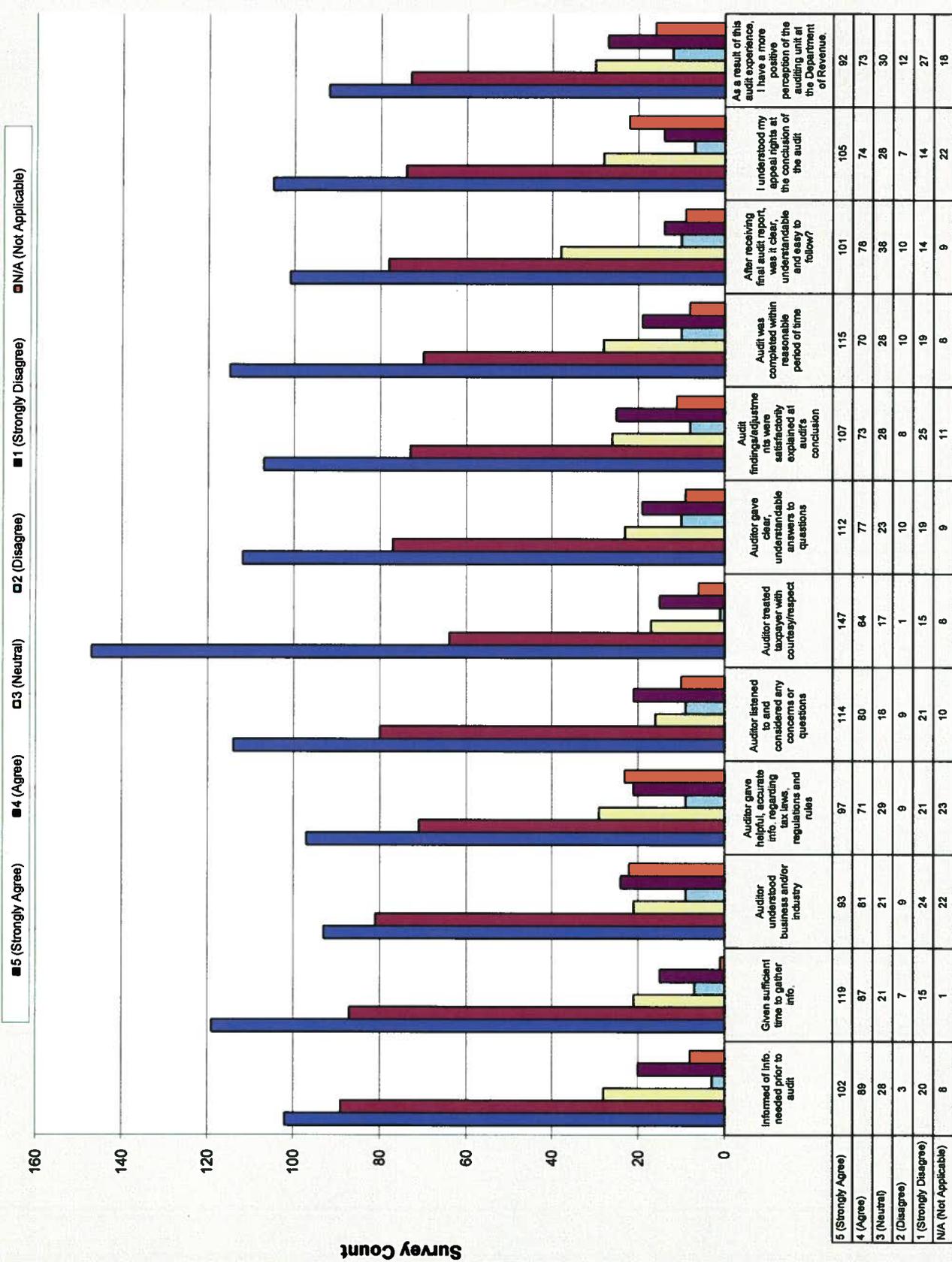
Individual Income Tax Post Audit Surveys (July 07-July 09)

Total Number of Surveys=250; Total Number of Questions per Survey= 12;

Total Number of Questions= 3,000



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Survey Questions