

**IRS Wage and Investment
DRAFT CSCO WI Phone Questionnaire
Customer Satisfaction Survey 2008**

Sample elements:

AREA CODE AND TELEPHONE NUMBER:
DATE AND TIME OF INTERVIEW:
SITE CODES:

Introduction 1:

Hello, this is _____, calling from Pacific Market Research.

- S1. May I please speak with (name on the list)?
- 1 Yes, respondent available - **(Continue)**
 - 2 No such person - **(Thank and terminate, save case ID)**
 - 3 Respondent not available/Not a good time - **(Set time to call back)**
 - 4 Soft refusal - **(Set time to call back)**
 5. Hard refusal - **(Thank and terminate)**

Introduction 2:

I am conducting a survey on behalf of the Internal Revenue Service. We are contacting taxpayers who have recently gone through the collection process. The IRS is interested in getting feedback about how well taxpayers were served so that they can improve their customer service to the public.

- S2. Did you receive a letter from the IRS about a **collection issue**?
- 1 Yes - **(Skip to S3)**
 - 2 No - **(Ask for appropriate respondent)**
 - 3 (DK) **(Thank and terminate)**
 - 4 (Refused) - **(Thank and terminate)**

**(INTERVIEWER NOTE: If person referred to is at a different phone number, record the following information).
Terminate call and call phone number of person who interacted with ACS Support.**

NAME:

RELATIONSHIP TO TAXPAYER:

PHONE NUMBER:

R1. **(For referrals only)** May I please speak with (name of the person referred)?

- 1 Yes, respondent available - **(Continue)**
- 2 No such person - **(Thank and terminate, save case ID)**
- 3 Respondent not available/Not a good time - **(Set time to call back)**
- 4 Soft refusal - **(Set time to call back)**
5. Hard refusal - **(Thank and terminate)**

R2. This is _____, calling from Pacific Market Research. I am conducting a survey on behalf of the Internal Revenue Service. We are contacting taxpayers who have recently gone through the collection process. The IRS is interested in getting feedback about how well taxpayers were served so that they can improve their customer service. You have been referred to us by (name of the taxpayer) as the person who handled his/her mail correspondence with the IRS. Is that correct?

- 1 Yes - **(Skip to S3)**
- 2 No - **(Ask for appropriate respondent)**
- 3 (DK) **(Thank and terminate)**
- 4 (Refused) - **(Thank and terminate)**

S3. Your opinion is very important to the IRS and will help the IRS improve its service to the public. The survey will take less than 10 minutes to complete. Your response will be kept strictly confidential. Would you like to participate?

1. Yes **(Proceed to survey)**
2. No **(Soft refusal) (Set time to call back)**
3. (DK) **(Set time to call back)**
4. (Refused) **(Thank and terminate)**

I'm going to read a list of items about your opinion regarding how the IRS handled your written correspondence. For each question, **regardless of whether you agree or disagree with the final outcome of the tax issue**, please indicate your opinion by choosing a number from 1 to 5, where 1 means "Very Dissatisfied" and 5 means "Very Satisfied." If a question does not apply to you, please state so. Again, please consider only your interactions with the IRS through **written** correspondence regarding a collection issue.

How satisfied are you with:

Q1a. The ease of obtaining information from the IRS?

- 5 Very satisfied
- 4 Somewhat satisfied
- 3 Neither satisfied nor dissatisfied
- 2 Somewhat dissatisfied, OR
- 1 Very dissatisfied
- 0 Not Applicable

Q1b. Explanation of why adjustments were made to your account?

Q1c. Length of time you were given to respond to the IRS, if a response was requested?

Q1d. Consideration given to the information you submitted?

Q1e. Length of the correspondence collection process, from when you first wrote the IRS to finish?

Q1f. Follow through of the IRS on what they said they were going to do?

Q1g. Understanding that you have payment options?

Q1h. Resolving this matter through written correspondence?

Q1i. Fairness of treatment by the IRS?

Q1j. Ease of understanding the notice you received in response to your written inquiry?

Q1k. Accuracy of information provided in response to your written inquiry?

Q1l. Time IRS took to respond to your written inquiry?

Q1m. Keeping you informed of the status of your case?

(If code "1" or "2" in Q1m, continue. Otherwise, skip to Q2.)

Q1m_ver. In what way are you not satisfied with the IRS keeping you informed of the status of your case?

_____ (Open ended)

Q1n. Clarity of instructions received from IRS?

Q1o. Explanation of the actions taken to resolve your inquiry?

Q2. Regardless of whether you agree or disagree with the final outcome, on the same scale, please rate your overall satisfaction with the way your tax issue was handled by the IRS. **(If necessary, repeat scale)**

- 5 Very satisfied
- 4 Somewhat satisfied
- 3 Neither satisfied nor dissatisfied
- 2 Somewhat dissatisfied
- 1 Very dissatisfied
- 0 Not applicable

Q3. Did you request any information from the IRS?

- 1 Yes
- 2 No

Q4. If yes, how did you request this information?

- 1 Mail
- 2 Email
- 3 Phone
- 4 In person

Q5. Did you receive the information you requested?

- 1 Yes
- 2 No

Q5a. If yes, how many days elapsed between the time you submitted this inquiry and the time you received a reply?

- 1 Right away (over the phone or in person)
- 2 Less than 15 days
- 3 15-29 days
- 4 30-44 days
- 5 45-69 days
- 6 Over 60 days
- 7 Did not receive a reply

Q5b. What is a reasonable time frame to wait for the IRS to respond to your issue?

- 1 Right away (over the phone or in person)
- 2 Less than 15 days
- 3 15-29 days
- 4 30-44 days
- 5 45-69 days

6 Over 60 days

Q6. Were you aware that you could call the IRS toll-free line to get assistance with your issue?

- 1 Yes
- 2 No

Q7. Please identify the issue(s) that prompted your recent inquiry to the IRS.

- 1 Payment verification**
- 2 Un-filed return(s)**
- 3 Payment arrangement**
- 4 Explanation of a Notice**
- 5 Penalty issue**
- 6 W2 Wage information**
- 7 Record of your account**
- 8 Other _____**

Q8. Were your issues with the IRS completely resolved?

- 1 Yes
- 2 No
- 3 Not Sure

Comments _____

Q9. Did you agree or disagree with the outcome?

- 1 Agreed**
- 2 Disagreed**
- 3 Not Sure**

Q10. Do you feel that the length of time it took the IRS to resolve your issue(s) was unusually lengthy and caused an undo burden?

- 1 Yes**
- 2 No**

Focus Group Recruiting Question

Q11. Occasionally, we conduct additional in-depth research. Participants may receive a small monetary incentive to participate. Would you be interested in participating in future research?

- 1 Yes
- 2 No (Skip to Q6)

Q11.1. Would you please provide me with your phone number, best time to call and/or your email so we can contact you when future research comes up?

Phone Number _____ [Note to Interviewers: Please repeat the phone number to taxpayer instead of asking the taxpayer to repeat it]

Best Time to Call _____ (Allow time range)
Email _____

Q12. Do you have any suggestions or comments you would like to make to the IRS regarding how they could improve service?

_____ (Open ended)

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, you may contact the Taxpayer Advocate Service at 1-877-777-4778. **CLOSING COMMENTS**

That completes the survey. We are required by law to report to you the OMB (Office Of Management and Budget) Control Number for this public information request. That number is XXXX-XXXX. In addition, if you have any comments about the time estimate to complete the survey or ways to improve the survey, you may write to the IRS. Would you like the address?

(IF YES, ADDRESS IS...)

Internal Revenue Service
 Tax Product Coordinating
 Committee
 1111 Constitution Avenue, NW
 Washington, DC 20224

(VALIDATE PHONE NUMBER AND THANK RESPONDENT BY SAYING:)

Again, this is _____, with Pacific Market Research on behalf of the IRS CSCO function. Thank you for your time.

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 survey 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, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224.