

Toll Free Wage and Investment
To be implemented October 1st, 2007

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

(For IRS administrator) Thank you for calling the Toll Free Survey.

Please enter your five-digit site code.

A. Please enter the resolution of this case from your perspective.

- For completely resolved, press 1
- For partially resolved, press 2
- For not resolved, press 3
- If you don't know, press 4

B. Please enter the issue that the taxpayer called about.

- For Earned Income Tax Credit, press 1
- For Refund, press 2
- For IMF Balance Due, press 3
- For BMF Balance Due, press 4
- For IMF Accounts, press 5
- For Tax law, press 6
- For Employment taxes, press 7
- For Other BMF Issue, press 8
- For NTA, press 9
- For EIN, press 10
- For Other, press 11
- If you don't know, press 12

Thank you. Please transfer caller now

(For Respondent)

Press the star key when you are ready to take the survey (to repeat in Spanish also)

- C. To take the survey in English, press 1
- To take the survey in Spanish, press 2

Quality of Service Section

Caller hears: Thank you for participating in this voluntary survey. This survey allows taxpayers to provide anonymous and confidential information to assist the IRS in improving its services. It

will take less than 10 minutes to complete. During this survey you will be asked to rate the service you received from the IRS during this call.

The following questions have to do with the IRS's automated answering system. You may enter your response as soon as you know your answer.

Please rate the following questions using the following scale:

- If you were very satisfied, press 5
- For somewhat satisfied, press 4
- For neither satisfied nor dissatisfied, press 3
- For somewhat dissatisfied, press 2
- For very dissatisfied, press 1
- If you are not sure, press 9

Press the star key to repeat the question.

Q1 Rate your satisfaction with the ease of understanding the automated answering system menu and instructions.

(For 3, 4, or 5 Skip to Q2)

Q1a. What about the automated menu or instructions were you least satisfied with? Begin speaking at the tone. Press any key when you are finished.

Q2 Rate your satisfaction with finding the menu choice that fit your question or issue.

Q3 Rate your satisfaction with the time it took to get through to the IRS when you called today. (For 3, 4, or 5 skip to Q4)

Q3a What about getting through to the IRS were you dissatisfied with? Begin speaking at the tone. Press any key when you are finished.

Q4 Did you get through to the right person? (If Yes, Skip to Q5)

- Yes, press 1
- No, press 2 (skip to Q6)
- Not sure, press 9 (skip to Q6)

Q5 Rate your satisfaction with the time it took to get to the right person.

Q6 Rate your satisfaction with the length of time it took to complete the call from when you first reached a representative. (For 3, 4, or 5 Skip to Q7)

Q6a. What are the main reasons you gave this rating? Begin speaking at the tone. Press any key when you are finished.

Caller hears: The following questions have to do with the IRS representative with whom you spoke. If you spoke with more than one, please consider the representative with whom you had the most contact. You may enter your response as soon as you know your answer.

Q7 Rate your satisfaction with the knowledge of the representative. _

Q8 Rate your satisfaction with the friendliness of the representative. _

Q9 _ Rate your satisfaction with the representative's willingness to help you with your- issue:

Q10 Rate your satisfaction with the fairness with which you were treated.

Q11 Rate your satisfaction with authority of the representative to make decisions regarding your issue.

Q12 Rate your satisfaction with getting all the information you needed during this call. _ (For 3, 4, or 5 skip to Q13)

Q12a. What are the main reasons you gave this rating? Begin speaking at the tone. Press any key when you are finished.

Q13 Everything considered, rate your overall satisfaction with the service you received during this call.

Q13a. Overall, what can the IRS do to improve the Toll Free service? Begin speaking at the tone. Press any key when you are finished.

Caller hears: There are just a few more questions left. Please listen carefully to the new response choices.

Q14 Why did you call the Toll Free service today?

If you called to request tax forms or instruction booklets, press 1

To answer a tax law question, press 2

Because the instructions in IRS publications were unclear, press 3

Because you received an IRS notice, press 4

To get tax account information, press 5

For any other reason, press 6

Q15 At the completion of your phone call, did you feel your issues were resolved?

If you feel they were completely resolved, press 1

For partly resolved, press 2
For not resolved, press 3
If you are not sure, press 9
(For 1 or 9 skip to Q16)

Q15a. Why do you feel the issue was not completely resolved? Begin speaking at the tone. Press any key when you are finished.

- Q16 Including today, how many times have you called about this particular issue?
Press 1 through 8 for the number of times you have called
Press 9 for 9 or more times. (IF PRESS ONCE, SKIP TO Q19)
- Q17 Did you get different answers to the same questions on different calls?
Yes, press 1
No, press 2
Not sure, press 9
- Q18 Did the IRS representative you spoke with know about what had been discussed on previous calls?
Yes, press 1
No, I had to start all over again, press 2
- Q19 Not counting this survey, how many people at the IRS did you speak to during this call?_
Press 1 through 4 for the number of people you spoke with.
If you spoke with 5 or more, press 5
If you are not sure, press 9
- Q20 How many minutes did you spend on this call including any time on hold, but not including the time spent answering this survey?_
If less than 10 minutes, press 1
10 to 20 minutes, press 2
21 to 30 minutes, press 3
30 minutes or longer, press 4
- Q21 Did you use any other methods to resolve your tax issue before you called today?
Yes, press 1
No, press 2 (skip to Question 23)
- Q22 Did you use any of the following methods to resolve your tax issue before you called today?
A. Did you visit the Web site, Press 1 for Yes or 2 for No
B. Did you use Tax software, Press 1 for Yes or 2 for No
C. Did you visit a Paid Preparer, Press 1 for Yes or 2 for No
D. Did you attempt to Email the IRS, Press 1 for Yes or 2 for No
E. Did you visit a Taxpayer Advocate, Press 1 for Yes or 2 for No
F. Did you send any Correspondence, Press 1 for Yes or 2 for No
- Q23 If possible, would you use the IRS web site to get the service you sought today?

- Yes, press 1
- No due to lack of internet access, press 2
- No because you prefer to speak with a person, press 3

New Question 1: Were you given an estimated wait time by the automated system while on hold during your call today? If Yes, press 1. If No, press 2

For those who said yes only:

New Question 2: How did advance notice of the waiting time affect your overall call experience?

If it had no effect, press 1

If positively, press 2

If negatively, press 2

Demographic Questions

- Question 24 If you called today as an individual taxpayer, press 1...skip to Q28
 A business taxpayer, press 2.... go toQ25
 An exempt organization, press 3...skip to text before 31
 Or a tax practitioner, press 4...skip to Q26
- Question 25 For businesses with assets less than 10 million dollars, press 1 skip to text before Q31
 Otherwise, press 2.....skip to text before Q31
- Question 26 As a tax practitioner, if you are representing an individual who filed a short form, press
1...skip to text before Q31
 An individual who filed a long form with no small business, farm, or supplemental
income, press 2...skip to text before Q31
 An individual who filed a long form with small business, farm, or supplemental income,
press 3...skip to text before Q31
 A business taxpayer, press 4
 Or an exempt organization, press 5...skip to text before Q31
- Question 27 If you are representing a business with assets less than 10 million dollars, press 1 skip to
text before Q31
 Otherwise, press 2.....skip to text before Q31
- Question 28 If you filed short form 1040EZ, press 1.....skip to text before Q31
 If you filed short form 1040A (did not itemize deductions), press 2.....skip to text
before Q31
 If you filed long form 1040 without other forms or schedules, press 3.....skip to
text before Q31
 If you filed long form 1040 with other forms or schedules, press 4
 If you don't remember which form you filed, press 5.....skip to text before Q31
- Question 29 If you reported income or losses from a farm or business you own, press 1
 From rental property, press 2
 From royalties, press 3
 From a partnership or S Corporation, press 4
 From an estate or trust, press 5
 If you don't remember, press 6

Question 30 If you filed a Form 2106 for employee business expenses, press 1
Otherwise, press 2

Next, We would like to collect some quick demographic data to help relate your responses to the most relevant service areas.

Question 31 Is your income between:
\$500 and \$20,000, press 1
\$20,000 and \$35,000, press 2
\$35,000 and \$60,000, press 3
\$60,000 and \$100,000, press 4
over \$100,000, press 5
Press 6 if you prefer not to answer.

Question 32 Please type in your age

Q33 We often do research on behalf of the IRS and need respondents for our research. Would you be willing to participate in future research? If so, please provide us with your phone number and email address if you have one. This information will be confidential and used only for the purpose of survey research. Research participants may receive a small monetary incentive to participate depending on the survey. _
If you would like to participate, press 1.....skip to Q33a
If you do not want to participate, press 2.....skip to Q34

Q33a Please type in phone number:

Q33b Please state and spell your first and last name:

End Section

Q34 Caller hears: That completes the survey; however, we are required by law to report to you the OMB Control Number for this public information request. That number is 1545-1432. In addition, if you have any comments about the time used to complete this survey or ways to improve the survey, you may write to the IRS. Would you like the address to mail your comments?

If yes, press 1
If no, press 2

If yes, the caller hears:

Mail your comments to:
Internal Revenue Service
Tax Products Coordinating Committee
1111 Constitution Ave., NW, Room 6510-S
Washington DC 20224

To repeat this address, press 1.

Otherwise, press 2.

Q35 If you have tried unsuccessfully to resolve a problem with the IRS or if you have a complaint, you may contact the Taxpayer Advocate's office by calling a toll-free telephone number. If you would like the telephone number of the Taxpayer Advocate, press 1. Otherwise, press 2.

If 1, the caller hears:

The toll-free Taxpayer Advocate phone number is 1-877-777-4778.

To repeat this telephone number, press 1.

Otherwise, press 2.

Thank you for participating in this survey. Your information will help improve the services provided by the IRS. Thank you. Goodbye.

Survey End