

## TE/GE Toll Free Automated Survey

Revised December 2006 for January 1<sup>st</sup> 2007 implementation, no revisions for January 1<sup>st</sup> 2008 implementation

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 quality staff)* Enter TEGE code.

### A. Resolution

- Completely, press 1
- Partially, press 2
- Not, press 3
- Don't know, press 4

### New Question B

#### Employee Level

- Agent, press 1
- CSS, press 2
- CSR, press 3
- Other, press 4

### C. Issue

- EO – press 1
- EP – press 2
- FSLG – press 3
- ITG – press 4
- TEB – press 5
- Don't know – press 6

Transfer now

*(For Respondent)*

Press the star key when you are ready to take the survey.

### Quality of Service Section

**Caller hears:** Thank you for participating in this voluntary survey. At any time during the survey, you may press the STAR key to repeat the question. You may enter your choice as soon as you know your answer.

The following questions deal with the reason you called today.

- Question 1
- If you called today regarding an exempt organization issue, press 1. (Go to question 2a)
  - An employee plan issue, press 2. (Go to question 2b)
  - A federal, state, or local government issue, press 3. (Go to question 2c)
  - An Indian Tribal Government issue, press 4. (Go to question 3c)
  - A tax-exempt bond issue, press 5 (Go to question 3c)
  - For other, press 6 (Skip to question 4)

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- Question 2a (EO only) What is your relationship to the organization:  
If you are an officer, director or other representative of an organization, Press 1  
If you are a **volunteer** in an exempt organization. Press 2  
If you are a lawyer or an accountant, Press 3  
Other, Press 4  
**(Go to Question 3a for any response option)**
- Question 2b (EP only) What is your relationship to the employee pension plan:  
If you are the sponsor for an employee plan, Press 1  
You are a plan participant. Press 2  
You are a lawyer or an accountant, Press 3  
Other, Press 4  
**(Go to Question 3b for any response option)**
- Question 2c (FSLG only) What level of government do you represent:  
If you are calling on behalf of a federal entity, Press 1  
If you are calling on behalf of a state entity, Press 2  
If you are calling on behalf of a local entity or municipality, Press 3  
Other, Press 4  
**(Go to Question 3c for any response option)**
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- Question 3a (EO only) If you called today:  
For help in completing a form or application, Press 1 (go to question 4)  
To verify or confirm an organization's exempt status, Press 2 (skip to question 3e)  
To obtain a copy of an Exempt Organization's determination letter, Press 3 (skip to question 4)  
To check on Status of an Application, Press 4 (go to question 3d)  
For help establishing an exempt organization, Press 5 (skip to question 4)  
To respond to a notice, Press 6 (skip to question 4)  
Other. Press 7 (skip to question 4)
- Question 3b (EP only) If you called today:  
For help in completing a form or application, Press 1 (go to question 4)  
To check on Status of an Application, Press 2 (go to question 3d)  
For help establishing an Employee Plan, Press 3 (go to question 4)  
To respond to a notice, Press 4 (go to question 4)  
Other. Press 5 (go to question 4)
- Question 3c (GE only) If you called today:  
For help in completing a form or application, Press 1 (go to question 4)  
For responding to a notice, Press 2 (go to question 4)  
Other. Press 3 (skip to question 4)
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- Question 3d (EO and EP) How long ago did you send your application to the IRS?  
Less than 60 days ago, press 1  
61 to 90 days ago, press 2  
91 to 120 days ago, press 3  
More than 120 days ago, press 4

**(Go to Question 4 for any response option)**

Question 3e (EO only)    If you requested verbal confirmation over the phone, press 1  
If you requested written confirmation, press 2

Caller hears: The following questions have to do with the representative with whom you spoke. If you spoke with more than one, please consider the representative with whom you spoke with last. 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

(Scale should repeat after each rating item – questions 4-12.)

*Note: Questions 4-8 will be presented in random order.*

Question 4        Rate your satisfaction with the knowledge of the representative.

Question 5        Rate your satisfaction with the courtesy of the representative who handled your call.

Question 6        Rate your satisfaction with the professionalism of the representative who handled your call.

Question 7        Rate your satisfaction with the representative's responsiveness to what you called about.

Question 8        Rate your satisfaction with the fairness with which you were treated.

Question 9        Rate your satisfaction with the friendliness of the representative.

Caller hears: The next set of questions has to do with the amount of time you spent on the issue and the IRS's automated answering system. You may enter your response as soon as you know your answer.

Question 10       Rate your satisfaction with how easily the automated telephone system directed you to the correct person.

Question 11       Rate your satisfaction with the time it took to get through to the IRS when you called today.

Question 12       Rate your satisfaction with the length of time it took to complete the call from when you first reached a representative.

Question 13 Rate your satisfaction with getting all the information you needed during this call.

Question 14       Everything considered, rate your overall satisfaction with the service you received during this call.

Q14a. Overall, what can the IRS do to improve the Toll Free service? Please be as specific as possible.  
Begin speaking at the tone. Press any key when you are finished.

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- Caller hears** We want to gather some more information about your call. Please listen carefully to the new response choices
- Question 15 Including today, how many times have you called and discussed this particular issue with an IRS representative?  
Press 1 through 4 for the number of times you have called  
Press 5 for 5 or more times. (IF PRESS ONCE, SKIP TO Q17)
- Question 16 Why did you call multiple times regarding this issue?  
If you had follow up questions to ask, press 1  
If you were advised to call back, press 2  
If you received different answers to your questions, press 3  
For any other reason, press 4
- Question 17 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 to 5 or more, press 5  
If you are not sure, press 9
- Question 18 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 5 minutes, press 1  
5 to 10 minutes, press 2  
11 to 20 minutes, press 3  
Longer than 20 minutes, press 4
- Question 19 At the completion of your phone call, did you feel your issues were resolved?  
If you feel they were completely resolved, press 1 (skip to text before question 21)  
For partly resolved, press 2  
For not resolved, press 3  
If you are not sure, press 9
- Question 20 Do you plan to call the toll free TE/GE service again to attempt to resolve your issue?  
Enter 1 for Yes or 2 for No.  
If you are unsure, press 3.
- Caller hears: There a just a few questions left. Please listen closely to the new response choices.
- Question 21 Did you attempt to solve your issue before calling the toll free service?  
Yes, press 1.  
No, press 2. (Skip to text before Q24)
- Question 22 What was the MAIN method through which you attempted to resolve your issue before calling the toll free service?  
IRS Form or publications, press 1  
The IRS Website at irs.gov, press 2,  
Third Party source such as an accountant or attorney, press 3  
Other, press 4

Question 23 Why did you ultimately choose to call the toll free number to resolve your issue?

**End Section**

**Caller hears** 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 Q24  
If you do not want to participate, press 2.....skip to Q25

Q24 Please type in phone number:

Q24a Please state and spell your first and last name:

**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.

Question 25 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.

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

**Survey End**