

VI. Attachments

Attachment A: Taxpayer Survey

<p>IRS Customer Satisfaction Quantitative Research</p> <p>TELEPHONE QUESTIONNAIRE FOR TAXPAYERS</p>

ROADMAP FOR UNDERSTANDING QUESTIONNAIRE FLOW:

- I. **Introduction** – includes interviewer script for asking for a respondent, introducing to survey purpose, asking willingness to continue
- II. **Screening** – ensure the respondent meets all qualifications to participate in the research

Taxpayer Qualification Criteria Summary

- Must not work in tax preparation, market research, or management consulting
- Must be between 18 years old and 64 years old
- Must have filed a tax return in 2009 (for the 2008 year) – either electronically, or via mail
- Must have called the IRS for customer service at least once in the past 3 years (**minimum 50% must have called in past 12 months**), or have considered calling, regarding any of the following issues (**WILL SOFT QUOTA FOR MIX OF ISSUES**):
 - o Get a form or publication
 - o Check the status of economic stimulus check or tax refund (**maximum 17%**)
 - o Tax law questions
 - o Obtain tax ID number
 - o Return preparation assistance
 - o Payment information
 - o Obtain information on prior year tax return
 - o Inquiries regarding IRS notices
- Soft quotas for mix (**based on IRS tax filing population data**) of:
 - o Method of filing – electronic, mail
 - o Preparation of return – use tax preparer or not
 - o Type of schedule(s) filed

QUOTAS:

HARD QUOTAS	1) English speakers who called	2) Spanish speakers who called	3) English speakers who considered calling
TOTAL N=	300	50	50
Has called in past 12 months	N=150 Minimum	N=25 Minimum	N/A



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Telephone Questionnaire for IRS Contact Center Customer Satisfaction Quantitative Survey

Called about stimulus check or tax refund	N=50 Maximum	N=9 Maximum	N=9 Maximum
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- III. Termination and Invitation language** – includes a script for respondents who disqualify for the research and a script for respondents who qualify
- IV. General Behavior Battery** – Objective: to determine pre-disposition to use various modes of customer service interaction generally (not specific to IRS)
- V. Importance of Customer Service Attributes** – Objective: to determine the standards against which the IRS’ performance is measured
- VI. Behavioral Battery on Experience with IRS** – Objective: to understand the reason for the need to contact the IRS most recently, as well as the number and methods of contacting the IRS for customer service for the most recent issue
- VII. Evaluation of IRS Performance** – Objective: to determine expectations for interactions with the IRS and to assess how the IRS measures against the standards established in the importance battery
- VIII. Comparative Perceptual Battery** – Objective: to determine how expectations for customer service from the IRS measure up against other industries and other governmental entities
- IX. Psychographic / Attitudinal Batteries** – Objective: to understand and identify some of the drivers associated with setting expectations for customer service from the IRS
- X. Reflections on IRS Customer Satisfaction** – Objective: to elicit open-ended responses about what was most satisfying and dissatisfying about the IRS experience; this will be used to detect any factors that have been unidentified
- XI. Additional Demographics** – Objective: to determine any additional demographic factors that might affect willingness to use the IRS website vs. the phone line

[The OMB number for this study is 1545-1432.](#)
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I. INTRODUCTION

QLANG. RECORD LANGUAGE

- 1. English
- 2. Spanish

QINTRO. Hello, my name is _____, and I'm with _____, a national market research firm. May I please speak with someone in the household who is over 18 years of age?

[WHEN APPROPRIATE PERSON IS ON THE LINE]:

The reason for my call is that the IRS is trying to improve its service to the public, and you may have the opportunity to help in that important mission. We are conducting research with taxpayers in the US on behalf of the IRS, and we would like to include your opinions.

[IF NEEDED]: Please let me assure you that this call is for research purposes only. You will not be required to give your name or any personal financial information, nor will you be contacted by the IRS as a result of participating in the research. All responses are completely anonymous and will only be used for research purposes.

We are offering \$**[INCENTIVE]** as a token of our appreciation to those who qualify to complete this survey. Do you have a few minutes to speak with me to see if you qualify?

- 1. **Yes** [CONTINUE]
- 0. **No** [SCHEDULE CALLBACK OR TERMINATE]

II. SCREENING QUESTIONS

[ASK IF QINTRO>0]

S1. Are you, or any member of your household, employed in any of the following businesses or industries? **[READ LIST]**

	A. Respondent	B. Member(s) of Household	
1. Market Research	<input type="radio"/>	<input type="radio"/>	TERMINATE
2. Management Consulting	<input type="radio"/>	<input type="radio"/>	TERMINATE
3. Tax preparation	<input type="radio"/>	<input type="radio"/>	IF RESPONDENT, REFER TO TAX PREPARER SCREENER; OTHERWISE, TERMINATE
0. None of the above	<input type="radio"/>	<input type="radio"/>	CONTINUE

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[ASK IF S1A-B=0]

S1a. Are you currently employed by the IRS?

1. **Yes** [TERMINATE]
2. **No**

[ASK IF S1a=2]

S2. Which of the following best describes your federal tax filing status in the US for the 2008 fiscal year? **(INTERVIEWER NOTE: Filed in 2009 for 2008 year) [READ LIST; SELECT ALL THAT APPLY]**

1. You personally filed or intend to file one or more US tax returns using tax preparation software **[MINIMUM 20%]**
2. You personally filed or intend to file one or more US tax returns manually (using pen and paper) **[MINIMUM 20%]**
3. You had or intend to have a tax professional file one or more US tax returns for you **[MAXIMUM 60%]**
4. You were or will be declared as a dependent on someone else's tax return **[TERMINATE]**
0. You did not file and do not plan to file any tax returns in the US for 2008 **[TERMINATE]**

S3. Which schedules did you or will you (or your tax preparer) complete for the year 2008? **[READ LIST 1-5; SELECT ALL THAT APPLY]**

1. Schedules A&B – Itemized Deductions and Interest and Ordinary Dividends
2. Schedule C – Profit or Loss from Business
3. Schedule D – Capital Gains and Losses
4. Schedule EIC – Earned Income Credit
5. Schedule SE – Self-Employment Tax
990. Other **[SPECIFY]**
0. Did not or will not file any schedules **[EXCLUSIVE]**
998. Not sure **[EXCLUSIVE]**

S4. What method did/will you (or your tax preparer) use to file your 2008 federal tax return(s)? **[READ LIST 1-3; SELECT ALL THAT APPLY]**

1. Electronic (e-file)
2. Paper (mail)
3. Phone
990. Other **[SPECIFY]**
998. Not sure **[EXCLUSIVE]**

Telephone Questionnaire for IRS Contact Center Customer Satisfaction Quantitative Survey

S5a. Have you, personally, called the IRS at any time in the past **12 months** for any of the following reasons? **[READ LIST; SELECT ALL THAT APPLY]**

1. To get a form or publication
2. To check the status of economic stimulus check or tax refund **[MAXIMUM 17%]**
3. To ask tax law questions
4. To obtain a tax ID number
5. To get return preparation assistance
6. To get payment information
7. To obtain information from a prior year's tax return
8. To inquire about an IRS notice **[UNQUALIFIED RESPONSE; ASK S5B]**
9. To arrange a payment **[UNQUALIFIED RESPONSE; ASK S5B]**
10. No, have not called the IRS in the past 12 months **[EXCLUSIVE; ASK S5B]**

[ASK S5B IF S5A=8-10 ONLY]

S5b. Have you, personally, called the IRS at any time in the past **3 years** for any of the following reasons? **[READ LIST; SELECT ALL THAT APPLY]**

1. To get a form or publication
2. To check the status of economic stimulus check or tax refund **[MAXIMUM 17%]**
3. To ask tax law questions
4. To obtain a tax ID number
5. To get return preparation assistance
6. To get payment information
7. To obtain information from a prior year's tax return
8. To inquire about an IRS notice **[UNQUALIFIED RESPONSE]**
9. To arrange a payment **[UNQUALIFIED RESPONSE]**
10. No, have not called the IRS in the past 3 years **[UNQUALIFIED RESPONSE]**

[ASK S5C IF S5A AND S5B=8-10 ONLY]

S5c. Have you ever *considered* calling the IRS for any of the following reasons within the past three years, but ultimately did not? **[READ LIST; SELECT ALL THAT APPLY]**

1. To get a form or publication
2. To check the status of economic stimulus check or tax refund **[MAXIMUM 17%]**
3. To ask tax law questions
4. To obtain a tax ID number
5. To get return preparation assistance
6. To get payment information
7. To obtain information from a prior year's tax return

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8. To inquire about an IRS notice **[UNQUALIFIED RESPONSE]**
9. To arrange a payment **[UNQUALIFIED RESPONSE]**
10. No, have not called the IRS in the past 12 months **[EXCLUSIVE; TERMINATE]**

[PROGRAMMER: CHECK QUOTA GROUPS:

CALLERS:

RESPONDENTS MUST ANSWER AT LEAST ONE OF 1-7 ON S5A OR S5B TO QUALIFY; NO MORE THAN 17% MAY QUALIFY AT OPTION 3 (CHECKING STATUS OF REFUND OR STIMULUS CHECK); MINIMUM OF 50% MUST QUALIFY AT S5A (MUST HAVE CALLED IN PAST 12 MONTHS)

CONSIDERERS:

RESPONDENTS MUST ANSWER AT LEAST ONE OF 1-7 ON S5C TO QUALIFY; NO MORE THAN 17% MAY QUALIFY AT OPTION 3 (CHECKING STATUS OF REFUND OR STIMULUS CHECK)]

INTERVIEWER: My next few questions are for classification purposes only.

S6. Which of the following categories includes your age? **[READ LIST]**

1. Under 18 **[TERMINATE]**
2. 18-24
3. 25-34
4. 35-44
5. 45-54
6. 55-64
7. 65 or older **[TERMINATE]**

999. [REFUSED – DO NOT READ] [TERMINATE]

S7. Which of the following categories includes your household's total annual income before taxes in 2008? **[READ LIST; STOP WHEN INCOME LEVEL IS REACHED]**

1. Less than \$10,000
2. \$10,000 but less than \$15,000
3. \$15,000 but less than \$25,000
4. \$25,000 but less than \$35,000
5. \$35,000 but less than \$50,000
6. \$50,000 but less than \$75,000
7. \$75,000 but less than \$100,000
8. \$100,000 but less than \$150,000

9. \$150,000 but less than \$200,000
10. \$200,000 but less than \$1,000,000
11. \$1,000,000 or more

999. [REFUSED – DO NOT READ] [TERMINATE]

S8. Are you of Hispanic or Latino origin?

1. Yes
2. No

S8a. What is your race? Please select one or more.

1. White
2. Black or African American
3. Asian
4. Native Hawaiian or other Pacific Islander
5. American Indian or Alaska Native

S9. [RECORD GENDER BASED ON OBSERVATION]

1. Male
2. Female

III. TERMINATION OR INVITATION LANGUAGE

TERMINATE LANGUAGE FOR NON-QUALIFYING RESPONDENTS

We truly appreciate your time and effort in answering these initial questions, which were designed to see if you are eligible to participate.

As part of our research process, we are trying to achieve a representative sample. Unfortunately, at this point, we have reached the number of respondents we can accept from individuals with your type of experience or background. Again, we would like to thank you for your time and effort.

Thank you. Have a nice day!

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INTRO LANGUAGE FOR QUALIFYING RESPONDENTS

Thank you for your responses so far. You have qualified to complete this survey.

The survey should take about 20 minutes to complete. Once you complete the survey you will be eligible to receive our \$[INCENTIVE] thank you payment. Information about how you will receive this payment will be provided at the end of the survey.

IV. GENERAL BEHAVIORAL BATTERY

The first several questions are about your use of different customer service options.

Q1. When handling customer service issues, how often do you use the following service options? Please answer “always,” “sometimes,” “rarely,” or “never” for each service option.

	3	2	1	0
	Always	Sometimes	Rarely	Never
1. Phone	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Company website	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Fax	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Email	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Postal mail	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. In person	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

*Q2. Which of the following service options do you typically use **first** when a customer service issue arises? [READ LIST; SELECT ONE]*

1. Phone
2. Company website
3. Fax
4. Email
5. Postal mail
6. In person

Q3. Why do you typically use [IF Q2=1: the phone; IF Q2=2: the company website; IF Q2=3: a fax; IF Q2=4: email; IF Q2=5: postal mail; IF Q2=6: in person] when a

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customer service issue arises? *Please select all that apply.* **[READ LIST; SELECT ALL THAT APPLY]**

1. It's the most reliable service option
2. It's the service option you trust most
3. It's the easiest service option for you to access
4. It's the service option you're most comfortable with
5. It's easiest to hold someone responsible should the information you receive prove incorrect
6. It's the service option with the greatest accuracy
990. Other **[SPECIFY]**
0. None of the above

V. IMPORTANCE OF CUSTOMER SERVICE ATTRIBUTES

[INTERVIEWER READ: Now we want to understand how you evaluate phone-based customer service.]

Q4. I'm going to read you a list of features and qualities that a phone-based customer service entity could provide, and we want you to place each one along the following 7 point scale, where:

- 1 = Not at all important**
- 4 = It's helpful, but not essential**
- 7 = Extremely important; it is impossible to have a good experience without it**

Please keep in mind, this is phone-based customer service only. How important is...

[READ LIST; ROTATE A-P]

	1	2	3	4	5	6	7
Process Issues							
How important is...							
A. ...the ability to call during evening and weekend hours in addition to regular business hours	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. ...a high quality automated menu system	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C. ...having the hold time required to reach a representative be minimal	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
D. ...not having to provide the same	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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information multiple times during the call							
Customer Service Representative							
How important is it that...							
E. ...the representative has the ability to communicate in [IF QLANG=ENGLISH, DISPLAY: "English"; IF QLANG=SPANISH, DISPLAY "Spanish"]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
F. ... the representative treats you with respect	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
G. ...the representative has an appropriate level of knowledge or expertise	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
H. ...the representative is aware of your previous contact history	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I. ...the representative answers your question or solves your problem in a timely manner	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
J. ...the representative is empowered to make decisions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K. ...the representative is your single point of contact; in other words, you are not transferred to multiple representatives	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall Resolution							
How important is it that...							
L. ...the total time you spend on the call is minimal	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
M. ...the call answers your question or resolves your issue	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
N. ...a minimal number of interactions with customer service is required to get a question answered or an issue resolved	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
O. ...you feel confident in the information or response given	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
P. ...customer service follows-up or follows-through with you on issues left unresolved	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q4A. THINKING SPECIFICALLY ABOUT THE AUTOMATED MENU SYSTEMS YOU ENCOUNTER WITH PHONE-BASED CUSTOMER SERVICE, HOW IMPORTANT ARE THE FOLLOWING FEATURES AND QUALITIES? PLEASE ANSWER "NOT AT ALL," "SLIGHTLY," "SOMEWHAT," OR "EXTREMELY" IMPORTANT FOR EACH FEATURE OR QUALITY.

[ROTATE]	0	1	2	3
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	Not at all	Slightly	Somewhat	Extremely
1. Specific menu options for the reason you called	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Easy to understand menu options	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Provides automated answers to simple questions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Simple to use	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Efficient; gets me to the right person or place quickly	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

VI. BEHAVIORAL BATTERY ON EXPERIENCE WITH IRS

[ASK IF RESPONDENT IS A PREVIOUS CALLER; CONSIDERERS SKIP TO Q10]

[INTERVIEWER READ: The next several questions are about your experiences with customer service provided by the IRS.]

Q5. In the past three years, approximately how many times have you contacted the IRS for customer service by phone, using a toll-free line?

1. **[RECORD NUMER 1-99]**

Q5b. Thinking about the time you **most recently** contacted the IRS for customer service by phone, using a toll-free line, how satisfied were you with the quality of service provided by the IRS overall? *Please use a 0-9 scale where 0 means “extremely dissatisfied” and 9 means “extremely satisfied.”*

1. **[RECORD NUMBER 0-9]**

998. Don't know

[INTERVIEWER: For the next several questions, please think about the time you **most recently** contacted the IRS for customer service by phone.]

[ASK IF S5A OR S5B > SINGLE RESPONSE; OTHERWISE, CODE Q6=S5A OR S5B RESPONSE AND CLASSIFY ACCORDINGLY, THEN ASK Q6A]

Q6. Thinking about your **most recent** contact with the IRS' customer service phone line, how would you describe the reason that you contacted them? *Please select all that apply.* **[READ LIST; SELECT ALL THAT APPLY]**

1. To get a form or publication **[CLASSIFY AS CUSTOMER-INITIATED]**
2. To check the status of economic stimulus check or tax refund **[CLASSIFY AS CUSTOMER-INITIATED]**

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- 3. To ask tax law questions [CLASSIFY AS CUSTOMER-INITIATED]
- 4. To obtain a tax ID number [CLASSIFY AS CUSTOMER-INITIATED]
- 5. To get return preparation assistance [CLASSIFY AS CUSTOMER-INITIATED]
- 6. To get payment information [CLASSIFY AS CUSTOMER-INITIATED]
- 7. To obtain information from a prior year's tax return [CLASSIFY AS CUSTOMER-INITIATED]
- 8. To inquire about an IRS notice [CLASSIFY AS IRS-INITIATED]
- 9. To arrange a payment [CLASSIFY AS CUSTOMER-INITIATED]
- 990. Other [SPECIFY]

Q6a. When did this **most recent** contact with the IRS' customer service phone line take place? Was it...

- 1. Prior to filing a tax return
- 2. After filing a tax return
- 998. Don't know

Q7. When trying to get your IRS question answered or issue resolved, which, if any, other sources of information *besides the phone* did you use? [READ LIST; SELECT ALL THAT APPLY; 0 IS EXCLUSIVE]

- 0. No other sources of information were used
- 1. Used the IRS.gov website
- 2. Went in person to an IRS Tax Assistance Center
- 3. Sent a letter to the IRS
- 4. Non-IRS website
- 5. A tax preparer, consultant, or attorney
- 6. Tax preparation software
- 990. Other [SPECIFY]

[IF Q7>0, ASK Q7a; OTHERWISE SKIP TO Q8]

Q7a. Did you use these other sources of information prior to calling the IRS, after calling the IRS, or both?

[RESTORE ITEMS BELOW BASED ON RESPONSES TO Q11]	Prior to calling	After calling	Both
1. Used the IRS.gov website	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Went in person to an IRS Tax Assistance Center	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Sent a letter to the IRS	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Non-IRS website	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. A tax preparer, consultant, or attorney	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. Tax preparation software	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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990. Other [SPECIFY]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

[ASK IF Q7>0]

Q8. What made you decide to contact the IRS for customer service by phone *in addition to* other ways of getting information? **[READ LIST; SELECT ALL THAT APPLY]**

- 1. You could not get your question answered or issue resolved using some other type of IRS customer service
- 2. You could not get your question answered or issue resolved using a source other than the IRS
- 3. You wanted to confirm or verify information you received from some other source
- 4. You did not agree with the answer that you received
- 990. Other **[SPECIFY]**

Q9. How many separate interactions with the IRS or other sources of information were required to answer your question or resolve your issue completely?

- 1. **[RECORD NUMBER 1-99]**
- 998. Don't know

- A. Number of phone calls **[DISPLAY FOR ALL]**
- B. Number of IRS website visits **[DISPLAY IF Q7=1]**
- C. Number of in-person visits to an IRS Tax Assistance Center **[DISPLAY IF Q7=2]**
- D. Number of letters sent and received **[DISPLAY IF Q7=3]**
- E. Number of non-IRS website visits **[DISPLAY IF Q7=4]**
- F. Number of contacts you had with a tax preparer, consultant, or attorney **[DISPLAY IF Q7=5]**
- G. Number of contacts a tax preparer, consultant, or attorney made on your behalf **[DISPLAY IF Q7=5]**
- H. Number of interactions with tax preparation software **[DISPLAY IF Q7=6]**
- I. Number of other interactions **[DISPLAY IF Q7=990]**

Q10. Have you ever attempted to call the IRS for customer service to get your question answered or your issue resolved, but hung up before you spoke to a customer service representative?

- 0. No

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- 1. Yes
- 998. Don't know

[ASK IF Q10=1; OTHERWISE SKIP TO Q12]

Q11. Why did you hang up before you spoke to a customer service representative? [DO NOT READ LIST]

- 1. Hold time was too long
- 2. Did not understand the automated system
- 3. You got the information you needed from the automated system
- 4. You were frustrated by the automated system
- 5. The automated system hung up on you
- 990. Found your answer some other way [SPECIFY]
- 991. Some other reason [SPECIFY]

[ASK IF CALLER AND Q9>0 (MULTIPLE INTERACTIONS); IF CONSIDERER, SKIP TO Q13]

Q12. Considering all the interactions you had with the IRS to get an answer to your question or resolve your issue, how long did it take to get resolution?

- 1. Less than one hour
- 2. More than one hour, but less than four hours
- 3. Resolved the same day, but took more than four hours
- 4. Longer than a day, but less than one week
- 5. Longer than a week, but less than a month
- 6. Longer than a month, but less than two months
- 7. Longer than two months
- 0. Issue was not resolved or is still not resolved

VII. EVALUATION OF IRS PERFORMANCE

Q13. [IF CALLER, DISPLAY: Thinking about your **most recent** contact with the IRS' customer service phone line, how closely do the following adjectives describe **the issue** you were calling about? Was the issue...]

[IF CONSIDERER, DISPLAY: Thinking about your most recent need to call the IRS for customer service, when you eventually decided **not** to call, how closely do the following adjectives describe the issue you were considering calling about? Was the issue...]

[ROTATE]	0	1	2	3
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Telephone Questionnaire for IRS Contact Center Customer Satisfaction Quantitative Survey

	Not at all	Slightly	Somewhat	Extremely
1. Straightforward	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Complex	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Urgent	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Difficult to resolve	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Minor	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q14. **[IF CALLER, DISPLAY:** How closely do the following adjectives describe how **you** felt *prior* to your most recent call to the IRS’ customer service phone line?]

[IF CONSIDERER, DISPLAY: How closely do the following adjectives describe how you felt prior to your decision **not to call**?]

[ROTATE]	0 Not at all	1 Slightly	2 Somewhat	3 Extremely
1. Anxious	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Frustrated	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Unconcerned	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Intimidated	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Confident	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. Cautious	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. Prepared	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q15. **[IF CALLER, DISPLAY:** To what extent do you disagree or agree with the following statements about your expectations *prior* to your most recent call to the IRS’ customer service phone line?]

[IF CONSIDERER, DISPLAY: To what extent do you disagree or agree with the following statements about your expectations prior to your decision **not to call** the IRS’ customer service phone line?]

[DISPLAY TO ALL: Please use a 0-9 scale where 0 means “Strongly disagree” and 9 means “Strongly agree.”]

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[ROTATE]	Strongly disagree	1	2	3	4	5	6	7	8	Strongly agree
	0									9
1. I assumed that calling the IRS to answer my question or resolve my issue would be very difficult.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. I assumed that calling the IRS to answer my question or resolve my issue would take very little time.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

[ASK IF CALLER ONLY; IF CONSIDERER, SKIP TO Q18a]

Q16. Now I'd like to ask you to rate the IRS' performance during your most recent experience with the customer service phone line on the same features and qualities you rated earlier.

We'll use a 1-7 scale where 1 means "extremely dissatisfied" and 7 means "extremely satisfied." So thinking of that most recent IRS' customer service experience how satisfied were you...

- [RECORD NUMBER 1-7]**
999. Not applicable

[ROTATE A-P]	Extremely dissatisfied	2	3	4	5	6	Extremely satisfied
	1						7
Process Issues							
How satisfied were you with...							
A. ...the ability to call during evening and weekend hours	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. ...the quality of the automated menu system	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C. ...the time you spent on hold before you reached a representative	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
D. ...the number of times you had to repeat the same information during the call	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Customer Service Representative							
How satisfied were you with...							

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E. ...the representative's ability to communicate in [IF ENGLISH SURVEY, DISPLAY: "English"; IF SPANISH SURVEY, DISPLAY "Spanish"]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
F. ...the respect with which the representative treated you	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
G. ...the representative's level of knowledge or expertise	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
H. ...the representative's awareness of your previous contact history	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I. ...the speed with which the representative answered your question or solved your problem	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
J. ...the representative's power to make decisions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K. ...the number of times you were transferred	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall Resolution							
How satisfied were you with...							
L. ...the total time you spent on the call	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
M. ...the extent to which the call answered your question or resolved your issue	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
N. ...the number of interactions with the IRS' customer service required to get answer your question or resolve your issue	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
O. ...the extent to which you had confidence in the information or response given	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
P. ...the follow-up or follow-through you received on issues left unresolved	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q17. To what extent do you disagree or agree with the following statements about your feelings **after** your most recent call to the IRS' customer service phone line? Please use a 0-9 scale where 0 means "Strongly disagree" and 9 means "Strongly agree."

1. [ENTER RESPONSE 0-9]
999. Not applicable

ROTATE A-E	Strongly disagree	1	2	3	4	5	6	7	8	Strongly agree
	0									9
A. I was completely confident	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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- that my question had been answered or my issue had been resolved at the end of the call.
- B. I felt that the IRS was a very trustworthy organization.
- C. I was very cautious about the information provided by the IRS.
- D. I did the right thing by calling the IRS customer service phone line.
- E. It required a great deal of effort on my part to get my question answered or my issue resolved.

[ASK IF CONSIDERER ONLY; IF CALLER, SKIP TO Q19]

Q18a. Why did you ultimately decide NOT to call the IRS' toll-free line for customer service?

1. **[RECORD RESPONSE]**
 998. Don't know

Q18b. What did you do instead of calling? **[READ LIST 1-7; SELECT ALL THAT APPLY]**

0. Nothing **[DO NOT READ]**
 1. Used the IRS.gov website
 2. Used a non-IRS website
 3. Went in person to a Tax Assistance Center
 4. Had a tax preparer contact the IRS on your behalf
 5. Sent a letter to the IRS
 6. Asked a professional tax preparer, consultant, or tax attorney for help
 7. Used tax preparation software
 990. Something else **[SPECIFY]**
 998. Don't know

VIII. COMPARATIVE PERCEPTUAL BATTERY

Q19. Thinking about past experiences, or what you know or may have heard, what would your expectations typically be when calling customer service at company or organization within each of the following industries...? Please use a scale from 0-9, where 0 is "Very low" and 9 is "Very high." **[READ LIST; RANDOMIZE A-G]**

ROTATE A-G	Very Low	1	2	3	4	5	6	7	8	Very High
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	0									9
A. Financial Services, such as a bank, mortgage company, or credit card company	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. Utility companies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C. DMV	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
D. IRS	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
E. Phone or cell phone companies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
F. Cable or Satellite TV service providers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

IX. PSYCHOGRAPHICS / ATTITUDES

PSYCHOGRAPHIC / ATTITUDINAL BATTERY: TOLERANCE FOR UNCERTAINTY

Q20. Using a scale from 0-9, where 0 is “Strongly disagree” and 9 is “Strongly agree,” please indicate your level of agreement with the following statements. **[READ LIST; RANDOMIZE A-L]**

ROTATE A-L	Strongly disagree	1	2	3	4	5	6	7	8	Strongly agree
	0									9
A. I don't like situations that are uncertain.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. I dislike questions which could be answered many different ways.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C. I feel uncomfortable when I don't understand the reason why an event occurred in my life.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
D. I tend to put off making important decisions until the last possible moment.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
E. When thinking about a problem, I consider as many different opinions on the issue as possible.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
F. I don't like going into a situation without knowing what I can expect from it.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
G. I'd rather know bad news than stay in a state of uncertainty.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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PSYCHOGRAPHIC / ATTITUDINAL BATTERY: PERCEPTIONS OF AUTHORITARIAN INSTITUTIONS

Q21. Using a scale from 0-9, where 0 is “Strongly disagree” and 9 is “Strongly agree,” please indicate your level of agreement with the following statements. **[READ LIST; RANDOMIZE A-I]**

ROTATE A-I	Strongly disagree	1	2	3	4	5	6	7	8	Strongly agree
	0									9
A. There’s generally a good reason for every IRS rule and regulation.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. I disagree with what the IRS stands for.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C. People should be guided more by their feelings and less by rules.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
D. Efficiency and speed are not as important as letting everyone have their say.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
E. I don’t mind if other people decide what I am to do, or advise me how to do it.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

PSYCHOGRAPHIC / ATTITUDINAL BATTERY: OUTCOME ASSESSMENT

Q21_1. Using a scale from 0-9, where 0 is “Strongly disagree” and 9 is “Strongly agree,” please indicate your level of agreement with the following statements regarding your feelings about customer service.

ROTATE A-C	Strongly disagree	1	2	3	4	5	6	7	8	Strongly agree
	0									9
A. If I don’t get the result I want, my customer service experience is automatically a bad one.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. The important thing about a customer service experience is to come to a conclusion, whether that	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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- conclusion favors me or not.
- C. The behavior of a customer service entity doesn't matter as long as I get the outcome I want.

X. REFLECTIONS ON IRS CUSTOMER SATISFACTION

[ASK IF CALLER ONLY; IF CONSIDERER, SKIP TO Q24]

Q22. Thinking back to your most recent experience with the IRS' customer service phone line, what aspect of the experience did you find most satisfying?

- 0. Nothing
- 1. **[INSERT RESPONSE]**
- 998. Don't know

Q23. Thinking back to your most recent experience with the IRS' customer service phone line, what aspect of the experience did you find most dissatisfying?

- 0. Nothing
- 1. **[INSERT RESPONSE]**
- 998. Don't know

[ASK IF CONSIDERER ONLY; IF CALLER, SKIP TO D1]

Q24. What could the IRS do to make it more likely that you would use the toll-free phone line for customer service?

- 0. Nothing
- 1. **[INSERT RESPONSE]**
- 998. Don't know

XI. ADDITIONAL DEMOGRAPHICS

D1. Please select the statement that best describes the language spoken in your household.

- 1. English is the **only** language spoken
- 2. English is the **primary** language spoken
- 3. A language other than English is the primary language spoken

D3. What is the highest level of education you've completed?

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1. Grade School
2. Some High School
3. High School /GED
4. Trade School
5. Some College
6. Associate's Degree
7. Bachelor's Degree
8. Master's Degree
9. Doctoral Degree
10. Professional Degree (M.D., J.D.)

Attachment B: Tax Preparer Survey

IRS Customer Satisfaction Quantitative Research

TELEPHONE QUESTIONNAIRE FOR TAX PREPARERS

ROADMAP FOR UNDERSTANDING QUESTIONNAIRE FLOW:

- I. **Introduction** – includes interviewer script for asking for a respondent, introducing to survey purpose, asking willingness to continue
- II. **Screening** – ensure the respondent meets all qualifications to participate in the research

Tax Preparer Recruitment Guidelines

- Must not work for the IRS, or in market research
- Must work as a tax preparer
- Must have filed at least one tax return for a client in 2009 (for the 2008 year) – either electronically, or via mail
- Must have called the IRS Practitioner Priority Service line for customer service at least once in the past 3 years (**minimum 75% per group must have called in past 12 months**), regarding any of the following issues (**SEEK GOOD MIX OF ISSUES**):
 - o Assistance on filing a tax return for a client
 - o Current information on tax law
 - o Checking status of economic stimulus check or tax refund for a client (**maximum 25%**)
 - o General tax information
 - o Filed a client's 1040 or 1040A return without an accompanying schedule or payment
- Seek mix of:
 - o Company size
 - o Employment status
 - o Length of time working in the industry/profession
 - o Type of returns filed for clients – personal, business

QUOTAS:

HARD QUOTAS	Professional Tax Preparers
TOTAL N=	100
Has called in past 12 months	N=50 Minimum
Called about stimulus check or tax refund	N=25 Maximum
Employed as a tax preparer or consultant part-	N=25 Maximum

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time, year round	
Employed as a tax preparer or consultant part-time, during tax season only	N=25 Maximum
Employed as a tax preparer or consultant less than two years	N=50 Maximum

- III. **Termination and Invitation language** – includes a script for respondents who disqualify for the research and a script for respondents who qualify
- IV. **General Behavior Battery** – Objective: to determine pre-disposition to use various modes of customer service interaction generally (not specific to IRS)
- V. **Importance of Customer Service Attributes** – Objective: to determine the standards against which the IRS’ performance is measured
- VI. **Behavioral Battery on Experience with IRS** – Objective: to understand the reason for the need to contact the IRS most recently, as well as the number and methods of contacting the IRS for customer service for the most recent issue
- VII. **Evaluation of IRS Performance** – Objective: to determine expectations for interactions with the IRS and to assess how the IRS measures against the standards established in the importance battery
- VIII. **Comparative Perceptual Battery** – Objective: to determine how expectations for customer service from the IRS measure up against other industries and other governmental entities
- IX. **Psychographic / Attitudinal Batteries** – Objective: to understand and identify some of the drivers associated with setting expectations for customer service from the IRS
- X. **Reflections on IRS Customer Satisfaction** – Objective: to elicit open-ended responses about what was most satisfying and dissatisfying about the IRS experience; this will be used to detect any factors that have been unidentified

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- XI. Additional Demographics – Objective:** to determine any additional demographic factors that might affect willingness to use the IRS website vs. the phone line

I. INTRODUCTION

Thank you for taking the time to see if you qualify for this study. The IRS is trying to improve its service to the public, and we could use your help. We are conducting research with tax professionals in the US on behalf of the IRS, and we would like to include your opinions.

Please let me assure you that this survey is for research purposes only. You will not be required to give your name or any personal financial information, nor will you be contacted by the IRS as a result of participating in the research. All responses are completely anonymous and will only be used for research purposes.

You will first be asked a few questions to make sure you qualify to participate. If you do qualify, you will then be invited to complete the full survey. If you need to pause the survey at any time, you can come back later and begin again where you left off. Simply save the URL and the Survey ID# from your survey invitation to access your survey again. The survey will automatically take you to the point where you left off.

Please click “Next” to begin.

II. SCREENING QUESTIONS

- S1. Are you, or any member of your household, employed in any of the following businesses or industries?

	A. Respondent	B. Member(s) of Household	
1. Market Research	<input type="radio"/>	<input type="radio"/>	TERMINATE
0. None of the above	<input type="radio"/>	<input type="radio"/>	CONTINUE

[ASK IF S1A-B=0]

- S1a. Are you currently employed by the IRS?

1. **Yes** [TERMINATE]
2. **No**

[ASK IF S1a=2]

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S2. In your professional capacity, do you function as a tax preparer or tax consultant?

1. Yes
2. No **[TERMINATE]**

[ASK IF S2=1]

S3. What type of professional tax preparer or tax consultant are you?

1. Certified public accountant (CPA)
2. Financial planner / Certified financial planner
3. Enrolled agent
4. Tax attorney
5. Unlicensed tax preparer
6. Other **[SPECIFY]** _____ **[TERMINATE]**
7. NOT a professional tax preparer or consultant **[TERMINATE]**

[ASK IF S3=1-5]

S4. Did you prepare and/or file any 2008 US federal tax returns for clients in 2009?

1. Yes
2. No **[TERMINATE]**

[ASK IF S4=1]

S5. What type of tax returns did you prepare and/or file for 2008? **[SELECT ALL THAT APPLY]**

1. Individual tax accounts (IMF)
2. Business tax accounts (BMF)
3. Neither **[TERMINATE]**

[ASK IF S5=1-2]

S6A. Have you, personally, called the IRS Practitioner Priority Service line at any time in the past 12 months for any of the following reasons? **[SELECT ALL THAT APPLY]**

1. To get assistance or correct a problem with a client's tax return
2. To get current information on tax law
3. To check on the status of a client's economic stimulus check or tax refund **[MAX 25%]**

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4. To obtain information from a client's prior year's tax return
5. To obtain or correct a client's tax ID number
6. Because you filed a client's 1040 or 1040A return without a required accompanying schedule or payment
7. Because a client received a notice from the IRS **[UNQUALIFIED RESPONSE; ASK S6B]**
8. To arrange a client's tax payment(s) **[UNQUALIFIED RESPONSE; ASK S6B]**
9. No, have not called the IRS in the past 12 months **[EXCLUSIVE; ASK S6B]**

[ASK IF S6A=7-9]

S6B. Have you, personally, called the IRS Practitioner Priority Service line at any time in the past **3 years** for any of the following reasons? **[SELECT ALL THAT APPLY]**

1. To get assistance or correct a problem with a client's tax return
2. To get current information on tax law
3. To check on the status of a client's economic stimulus check or tax refund **[MAX 25%]**
4. To obtain information from a client's prior year's tax return
5. To obtain or correct a client's tax ID number
6. Because you filed a client's 1040 or 1040A return without a required accompanying schedule or payment
7. Because a client received a notice from the IRS **[UNQUALIFIED RESPONSE; ASK S6B]**
8. To arrange a client's tax payment(s) **[UNQUALIFIED RESPONSE; ASK S6B]**
9. No, have not called the IRS in the past 12 months **[EXCLUSIVE; ASK S6B]**

[RESPONDENTS MUST ANSWER AT LEAST ONE OF 1-6 ON S6A OR S6B TO QUALIFY; NO MORE THAN 25% MAY QUALIFY AT OPTION 3 (CHECKING STATUS OF REFUND OR STIMULUS CHECK); MINIMUM OF 75% MUST QUALIFY AT S6A (MUST HAVE CALLED IN PAST 12 MONTHS)]

S7. How would you describe your employment status as a tax preparer or tax consultant?

1. Full-time, year-round
2. Full-time, during tax season only
3. Part-time, year-round **[MAX 25%]**
4. Part-time, during tax season only **[MAX 25%]**

S8. How long have you worked as a tax preparer or tax consultant?

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1. Less than two years **[MAX 50%]**
2. At least two but less than 5 years
3. At least 5 years, but less than 10 years
4. 10 years or more

The next few questions are for classification purposes only.

S9. Which of the following describes your place of employment as a tax preparer or tax consultant? **[SELECT ONLY ONE]**

1. Firm that specializes in tax preparation only
2. Firm that specializes in legal services
3. Financial services / financial planning provider
4. Other [SPECIFY] _____

S10. Approximately how many employees are at your company, at all locations worldwide? Your best estimate is fine. **[READ LIST; SELECT ALL THAT APPLY]**

1. 1 (Self-employed)
2. 2-9
3. 10-99
4. 100-499
5. 500-999
6. 1,000-24,999
7. 25,000 or more

S11. Do you participate in the IRS' e-file program?

1. Yes
2. No

III. TERMINATION OR INVITATION LANGUAGE

TERMINATE LANGUAGE FOR NON-QUALIFYING RESPONDENTS

We truly appreciate your time and effort in answering these initial questions, which were designed to see if you are eligible to participate.

As part of our research process, we are trying to achieve a representative sample. Unfortunately, at this point, we have reached the number of respondents we can accept from individuals with your type of experience or background. Again, we would like to thank you for your time and effort.

Thank you. Have a nice day!

INTRO LANGUAGE FOR QUALIFYING RESPONDENTS

Thank you for your responses so far. You have qualified to complete this survey.

The survey should take about 20 minutes to complete. Once you complete the survey you will be eligible to receive our \$[INCENTIVE] thank you payment. Information about how you will receive this payment will be provided at the end of the survey.

IV. GENERAL IRS CONTACT BEHAVIORAL BATTERY

The first several questions are about your use of different customer service options.

Q1. Please read the following list of possible reasons a tax professional, like yourself, might have for contacting the IRS. Based on your experience, or what you may have heard, please rate each reason in terms of how simple or complex this type of issue typically tends to be, using a scale from 1 to 7, where 1 is “Extremely simple” and 7 is “Extremely complex.”

	Extremely simple	2	3	4	5	6	Extremely complex
	1						7
1. Getting assistance or correcting a problem with a client's tax return	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Getting current information on tax law	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Checking on the status of a client's economic stimulus check or tax refund	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Obtaining information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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from a client's prior year's tax return							
5. Obtaining or correcting a client's tax ID number	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. A client's 1040 or 1040A return was filed without a required accompanying schedule or payment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. A client received a notice from the IRS	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8. Arranging a client's tax payment(s)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q2. On average, how many individual contacts with the IRS are typically required to get a resolution for each of the following reasons? *This may include phone calls, website visits, fax, or any other method of contacting the IRS.*

	Number of contacts
1. Getting assistance or correcting a problem with a client's tax return	[RECORD #]
2. Getting current information on tax law	[RECORD #]
3. Checking on the status of a client's economic stimulus check or tax refund	[RECORD #]
4. Obtaining information from a client's prior year's tax return	[RECORD #]
5. Obtaining or correcting a client's tax ID number	[RECORD #]
6. A client's 1040 or 1040A return was filed without a required accompanying schedule or payment	[RECORD #]
7. A client received a notice from the IRS	[RECORD #]
8. Arranging a client's tax payment(s)	[RECORD #]

Q3. On average, how many hours are typically necessary for you to spend in order to get a resolution for each of the following reasons?

	Number of hours
1. Getting assistance or correcting a problem with a client's tax return	[RECORD #]
2. Getting current information on tax law	[RECORD #]
3. Checking on the status of a client's economic stimulus check or tax refund	[RECORD #]

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4. Obtaining information from a client's prior year's tax return	[RECORD #]
5. Obtaining or correcting a client's tax ID number	[RECORD #]
6. A client's 1040 or 1040A return was filed without a required accompanying schedule or payment	[RECORD #]
7. A client received a notice from the IRS	[RECORD #]
8. Arranging a client's tax payment(s)	[RECORD #]

Q3a. Thinking back over the past 12 months, on behalf of what percentage of your clients have you contacted the IRS for each of the following reasons?

	Percentage of clients
1. Getting assistance or correcting a problem with a client's tax return	[RECORD #]
2. Getting current information on tax law	[RECORD #]
3. Checking on the status of a client's economic stimulus check or tax refund	[RECORD #]
4. Obtaining information from a client's prior year's tax return	[RECORD #]
5. Obtaining or correcting a client's tax ID number	[RECORD #]
6. A client's 1040 or 1040A return was filed without a required accompanying schedule or payment	[RECORD #]
7. A client received a notice from the IRS	[RECORD #]
8. Arranging a client's tax payment(s)	[RECORD #]

Q3b. How many individual clients do you typically have per year?

[RECORD #]

V. IMPORTANCE OF CUSTOMER SERVICE ATTRIBUTES

Now we want to understand how you evaluate phone-based customer service.

Q4. Please read the following list of features and qualities that a phone-based customer service entity could provide, and place each one along a 7 point scale, where:

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- 1 = Not at all important**
- 4 = It's helpful, but not essential**
- 7 = Extremely important; it is impossible to have a good experience without it**

Please keep in mind, this is phone-based customer service only. How important is...

[ROTATE A-P]

	1	2	3	4	5	6	7
Process Issues							
How important is...							
A. ...the ability to call during evening and weekend hours in addition to regular business hours	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. ...a high quality automated menu system	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C. ...having the hold time required to reach a representative be minimal	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
D. ...not having to provide the same information multiple times during the call	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Customer Service Representative							
How important is it that...							
E. ...the representative has the ability to communicate in English	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
F. ... the representative treats you with respect	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
G. ...the representative has an appropriate level of knowledge or expertise	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
H. ...the representative is aware of any previous contacts you've made on your client's behalf	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I. ...the representative answers your question or solves your problem in a timely manner	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
J. ...the representative is empowered to make decisions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K. ...the representative is your single point of contact; in other words, you are not transferred to multiple representatives	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall Resolution							

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How important is it that...							
L. ...the total time you spend on the call is minimal	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
M. ...the call answers your question or resolves your issue	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
N. ...a minimal number of interactions with customer service is required to get a question answered or an issue resolved	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
O. ...you feel confident in the information or response given	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
P. ...customer service follows-up or follows-through with you on issues left unresolved	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q4A. THINKING SPECIFICALLY ABOUT THE AUTOMATED MENU SYSTEMS YOU ENCOUNTER WITH PHONE-BASED CUSTOMER SERVICE, HOW IMPORTANT ARE THE FOLLOWING FEATURES AND QUALITIES?

[ROTATE]	0 Not at all	1 Slightly	2 Somewhat	3 Extremely
1. Specific menu options for the reason you called	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Easy to understand menu options	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Provides automated answers to simple questions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Simple to use	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Efficient; gets me to the right person or place quickly	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

VI. BEHAVIORAL BATTERY ON EXPERIENCE WITH IRS

The next several questions are about your experiences with customer service provided by the IRS.

Q5. Thinking about the time you **most recently** contacted the IRS for customer service by phone, using the Practitioner Priority Service line, how satisfied were you with the quality of service provided by the IRS overall? *Please use a 0-9 scale where 0 means “extremely dissatisfied” and 9 means “extremely satisfied.”*

1. [RECORD NUMBER 0-9]
998. Don't know

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Q5a. In the past year, have you contacted the IRS for customer service by phone, using the public toll-free line (i.e., Tax Help Line for Individuals)?

1. Yes
2. No
3. Not sure

[ASK IF Q5a=1]

Q5b. Thinking about the time you **most recently** contacted the IRS for customer service by phone, using the public toll-free line (i.e., Tax Help Line for Individuals), how satisfied were you with the quality of service provided by the IRS overall? *Please use a 0-9 scale where 0 means “extremely dissatisfied” and 9 means “extremely satisfied.”*

1. **[RECORD NUMBER 0-9]**
998. Don't know

[ASK IF Q5a=1]

Q5c. When contacting the IRS for customer service by phone, which line do you use most frequently?

1. Practitioner Priority Service line
2. Public toll-free line (i.e., Tax Help Line for Individuals)

[ASK IF Q5a=1]

Q5d. Why do you call the **[IF Q5c=1: Practitioner Priority Service line; IF Q5c=2: public toll-free line (i.e., Tax Help Line for Individuals)]** most frequently?

1. **[RECORD RESPONSE]**

[ASK IF Q5a=1]

Q5e. You mentioned that you **also** use the **[IF Q5c=1: public toll-free line (i.e., Tax Help Line for Individuals); IF Q5c=2: Practitioner Priority Service line]**. For what reasons or types of issues do you use this line?

1. **[RECORD RESPONSE]**

For the next several questions, please think about the time you **most recently** contacted the IRS for customer service by phone, using the Practitioner Priority Service line.

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[ASK IF S6A OR S6B > SINGLE RESPONSE; OTHERWISE, CODE Q6=S6A OR S6B RESPONSE AND CLASSIFY ACCORDINGLY, THEN ASK Q6A]

Q6. Thinking about your *most recent* contact with the IRS' Practitioner Priority Service line, how would you describe the reason that you contacted them? *Please select all that apply.* [SELECT ALL THAT APPLY]

1. To get assistance or correct a problem with a client's tax return [CLASSIFY AS CUSTOMER-INITIATED]
2. To get current information on tax law [CLASSIFY AS CUSTOMER-INITIATED]
3. To check on the status of a client's economic stimulus check or tax refund [CLASSIFY AS CUSTOMER-INITIATED]
4. To obtain information from a client's prior year's tax return [CLASSIFY AS CUSTOMER-INITIATED]
5. To obtain or correct a client's tax ID number
6. Because you filed a client's 1040 or 1040A return without a required accompanying schedule or payment [CLASSIFY AS CUSTOMER-INITIATED]
7. Because a client received a notice from the IRS [CLASSIFY AS IRS-INITIATED]
8. To arrange a client's tax payments [CLASSIFY AS CUSTOMER-INITIATED]
990. Other [SPECIFY]

Q7. When trying to get your IRS question answered or issue resolved, which, if any, other sources of information *besides the phone* did you use? [READ LIST; SELECT ALL THAT APPLY; 0 IS EXCLUSIVE]

0. No other sources of information were used
1. Used the IRS.gov website
2. Went in person to an IRS Tax Assistance Center
3. Sent a letter to the IRS
4. Non-IRS website
5. Another tax preparer, consultant, or attorney
6. Tax preparation software
7. Commerce Clearing House (CCH) source (such as the Master Tax Guide, CCH Research, etc.)
8. Professional association (such as AICPA)
9. Tax reference manual for professionals (such as Quickfinder)
990. Other [SPECIFY]

[IF Q7>0, ASK Q7a; OTHERWISE SKIP TO Q8]

Q7a. Did you use these other sources of information prior to calling the IRS, after calling the IRS, or both?

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[RESTORE ITEMS BELOW BASED ON RESPONSES TO Q11]	Prior to calling	After calling	Both
1. Used the IRS.gov website	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Went in person to an IRS Tax Assistance Center	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Sent a letter to the IRS	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Non-IRS website	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Another tax preparer, consultant, or attorney	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. Tax preparation software	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. Commerce Clearing House (CCH) source (such as the Master Tax Guide, CCH Research, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8. Professional association (such as AICPA)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9. Tax reference manual for professionals (such as Quickfinder)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
990. Other [SPECIFY]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

[ASK IF Q7>0]

Q8. What made you decide to contact the IRS for customer service by phone *in addition to* other ways of getting information? **[READ LIST; SELECT ALL THAT APPLY]**

- 1. You could not get your question answered or issue resolved using some other type of IRS customer service
- 2. You could not get your question answered or issue resolved using a source other than the IRS
- 3. You wanted to confirm or verify information you received from some other source
- 5. You did not agree with the answer that you received
- 990. Other **[SPECIFY]**

Q9. How many separate interactions with the IRS or other sources of information were required to answer your question or resolve your issue completely?

- 1. **[RECORD NUMBER 1-99]**
- 998. Don't know

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- A. Number of phone calls **[DISPLAY FOR ALL]**
 - B. Number of IRS website visits **[DISPLAY IF Q7=1]**
 - C. Number of in-person visits to an IRS Tax Assistance Center **[DISPLAY IF Q7=2]**
 - D. Number of letters sent and received **[DISPLAY IF Q7=3]**
 - E. Number of non-IRS website visits **[DISPLAY IF Q7=4]**
 - F. Number of contacts you had with a tax preparer, consultant, or attorney **[DISPLAY IF Q7=5]**
 - G. Number of interactions with tax preparation software **[DISPLAY IF Q7=6]**
 - H. Number of interactions with Commerce Clearing House (CCH) source (such as the Master Tax Guide, CCH Research, etc.) **[DISPLAY IF Q7=7]**
 - I. Number of interactions with a professional association (such as AICPA) **[DISPLAY IF Q7=8]**
 - J. Number of interactions with a tax reference manual for professionals (such as Quickfinder) **[DISPLAY IF Q7=9]**
 - K. Number of other interactions **[DISPLAY IF Q7=990]**
- Q10. Have you ever attempted to call the IRS for customer service to get your question answered or your issue resolved, but hung up before you spoke to a customer service representative?
- 0. No
 - 1. Yes
 - 998. Don't know

[ASK IF Q10=1; OTHERWISE SKIP TO Q12]

Q11. Why did you hang up before you spoke to a customer service representative? **[DO NOT READ LIST]**

- 1. Hold time was too long
- 2. Did not understand the automated system
- 3. You got the information you needed from the automated system
- 4. You were frustrated by the automated system
- 5. The automated system hung up on you
- 990. Found your answer some other way **[SPECIFY]**
- 991. Some other reason **[SPECIFY]**

[ASK IF CALLER AND Q9>0 (MULTIPLE INTERACTIONS); IF CONSIDERER, SKIP TO Q13]

Q12. Considering all the interactions you had with the IRS to get an answer to your question or resolve your issue, how long did it take to get resolution?

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1. Less than one hour
2. More than one hour, but less than four hours
3. Resolved the same day, but took more than four hours
4. Longer than a day, but less than one week
5. Longer than a week, but less than a month
6. Longer than a month, but less than two months
7. Longer than two months
0. Issue was not resolved or is still not resolved

VII. EVALUATION OF IRS PERFORMANCE

Q13. Thinking about your **most recent** contact with the IRS' Practitioner Priority Service line, how closely do the following adjectives describe **the issue** you were calling about? Was the issue...

[ROTATE]	0 Not at all	1 Slightly	2 Somewhat	3 Extremely
1. Straightforward	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Complex	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Urgent	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Difficult to resolve	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Minor	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q14. How closely do the following adjectives describe how **you felt prior** to your most recent call to the IRS' Practitioner Priority Service line?

[ROTATE]	0 Not at all	1 Slightly	2 Somewhat	3 Extremely
1. Frustrated	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Unconcerned	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Confident	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Cautious	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Prepared	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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Q15. To what extent do you disagree or agree with the following statements about your expectations *prior* to your most recent call to the IRS' Practitioner Priority Service line?

[DISPLAY TO ALL: Please use a 0-9 scale where 0 means “Strongly disagree” and 9 means “Strongly agree.”]

[ROTATE]	Strongly disagree	1	2	3	4	5	6	7	8	Strongly agree
	0									9
1. I assumed that calling the IRS to answer my question or resolve my issue would be very difficult.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. I assumed that calling the IRS to answer my question or resolve my issue would take very little time.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q16. Now please rate the IRS' performance during your most recent experience with the Practitioner Priority Service line on the same features and qualities you rated earlier.

Please use a 1-7 scale where 1 means “extremely dissatisfied” and 7 means “extremely satisfied.” So thinking of that most recent IRS' customer service experience how satisfied were you...

[ROTATE A-P]	Extremely dissatisfied	2	3	4	5	6	Extremely satisfied
	1						7
Process Issues							
How satisfied were you with...							
A. ...the ability to call during evening and weekend hours	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. ...the quality of the automated menu system	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C. ...the time you spent on hold before you reached a representative	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
D. ...the number of times you had to repeat the same information during the call	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Customer Service Representative							

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Telephone Questionnaire for IRS Contact Center Customer Satisfaction Quantitative Survey

How satisfied were you with...							
E. ...the representative's ability to communicate in English	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
F. ...the respect with which the representative treated you	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
G. ...the representative's level of knowledge or expertise	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
H. ...the representative's awareness of any previous contacts you've made on your client's behalf	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I. ...the speed with which the representative answered your question or solved your problem	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
J. ...the representative's power to make decisions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K. ...the number of times you were transferred	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall Resolution							
How satisfied were you with...							
L. ...the total time you spent on the call	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
M. ...the extent to which the call answered your question or resolved your issue	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
N. ...the number of interactions with the IRS' customer service required to get answer your question or resolve your issue	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
O. ...the extent to which you had confidence in the information or response given	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
P. ...the follow-up or follow-through you received on issues left unresolved	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q16a. To what extent do you disagree or agree with the following statements about your feelings **after** your most recent call to the IRS Practitioner Priority Service line? Please use a 0-9 scale where 0 means "Strongly disagree" and 9 means "Strongly agree."

ROTATE A-E	Strongly disagree	1	2	3	4	5	6	7	8	Strongly agree
	0									9
A. I was completely confident that my question had been answered or my issue had been resolved at the end of the call.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. I felt that the IRS was a very	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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trustworthy organization.

- C. I was very cautious about the information provided by the IRS.
- D. Calling the IRS was the best way to get my question answered or my issue resolved.
- E. It required a great deal of effort on my part to get my question answered or my issue resolved.
- F. Calling the IRS was a complete waste of time.

[ASK IF Q5a=1; PROGRAMMER: PUT Q16 AND Q17 ON SAME SCREEN IF BOTH APPLY]

Q17. Now please rate the IRS' performance during your most recent experience with the public toll-free line (i.e., Tax Help Line for Individuals) on the same features and qualities you rated earlier.

Please use a 1-7 scale where 1 means "extremely dissatisfied" and 7 means "extremely satisfied." So thinking of that most recent IRS' customer service experience how satisfied were you...

[ROTATE A-P]	Extremely dissatisfied	2	3	4	5	6	Extremely satisfied
	1						7
Process Issues							
How satisfied were you with...							
A. ...the ability to call during evening and weekend hours	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. ...the quality of the automated menu system	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C. ...the time you spent on hold before you reached a representative	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
D. ...the number of times you had to repeat the same information during the call	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Customer Service Representative							
How satisfied were you with...							
E. ...the representative's ability to communicate in English	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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F. ...the respect with which the representative treated you	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
G. ...the representative's level of knowledge or expertise	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
H. ...the representative's awareness of any previous contacts you've made on your client's behalf	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I. ...the speed with which the representative answered your question or solved your problem	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
J. ...the representative's power to make decisions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
K. ...the number of times you were transferred	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall Resolution							
How satisfied were you with...							
L. ...the total time you spent on the call	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
M. ...the extent to which the call answered your question or resolved your issue	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
N. ...the number of interactions with the IRS' customer service required to get answer your question or resolve your issue	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
O. ...the extent to which you had confidence in the information or response given	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
P. ...the follow-up or follow-through you received on issues left unresolved	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

[ASK IF Q5a=1; PROGRAMMER: PUT Q16A AND Q17A ON SAME SCREEN IF BOTH APPLY]

Q17a. To what extent do you disagree or agree with the following statements about your feelings **after** your most recent call to the IRS' public toll-free line (i.e., Tax Help Line for Individuals)? Please use a 0-9 scale where 0 means "Strongly disagree" and 9 means "Strongly agree."

ROTATE A-E	Strongly disagree	1	2	3	4	5	6	7	8	Strongly agree
	0									9
A. I was completely confident that my question had been answered or my issue had been resolved at the end of the call.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. I felt that the IRS was a very	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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trustworthy organization.

- C. I was very cautious about the information provided by the IRS.
- D. Calling the IRS was the best way to get my question answered or my issue resolved.
- E. It required a great deal of effort on my part to get my question answered or my issue resolved.
- F. Calling the IRS was a complete waste of time.

VIII. COMPARATIVE PERCEPTUAL BATTERY

Q18. Thinking about past experiences, or what you know or may have heard, what would your expectations typically be when calling customer service at company or organization within each of the following industries...? Please use a scale from 0-9, where 0 is "Very low" and 9 is "Very high." **[READ LIST; RANDOMIZE A-G]**

ROTATE A-G	Very Low									Very High
	0	1	2	3	4	5	6	7	8	9
A. Financial Services, such as a bank, mortgage company, or credit card company	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. Utility companies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C. DMV	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
D. IRS	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
E. Phone or cell phone companies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
F. Cable or Satellite TV service providers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

IX. PSYCHOGRAPHICS / ATTITUDES

PSYCHOGRAPHIC / ATTITUDINAL BATTERY: TOLERANCE FOR UNCERTAINTY

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Q19. Using a scale from 0-9, where 0 is “Strongly disagree” and 9 is “Strongly agree,” please indicate your level of agreement with the following statements. **[READ LIST; RANDOMIZE A-L]**

ROTATE A-L	Strongly disagree	1	2	3	4	5	6	7	8	Strongly agree
	0									9
A. I don't like situations that are uncertain.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. I dislike questions which could be answered many different ways.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C. I feel uncomfortable when I don't understand the reason why an event occurred in my life.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
D. I tend to put off making important decisions until the last possible moment.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
E. When thinking about a problem, I consider as many different opinions on the issue as possible.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
F. I don't like going into a situation without knowing what I can expect from it.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
G. I'd rather know bad news than stay in a state of uncertainty.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

PSYCHOGRAPHIC / ATTITUDINAL BATTERY: PERCEPTIONS OF AUTHORITARIAN INSTITUTIONS

Q20. Using a scale from 0-9, where 0 is “Strongly disagree” and 9 is “Strongly agree,” please indicate your level of agreement with the following statements. **[READ LIST; RANDOMIZE A-I]**

ROTATE A-I	Strongly disagree	1	2	3	4	5	6	7	8	Strongly agree
	0									9
A. There's generally a good reason for every IRS rule and regulation.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. I disagree with what the IRS stands for.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C. People should be guided more by their feelings and less by rules.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
D. Efficiency and speed are	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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not as important as letting everyone have their say.

- E. I don't mind if other people decide what I am to do, or advise me how to do it.

PSYCHOGRAPHIC / ATTITUDINAL BATTERY: OUTCOME ASSESSMENT

Q20_1. Using a scale from 0-9, where 0 is “Strongly disagree” and 9 is “Strongly agree,” please indicate your level of agreement with the following statements regarding your feelings about customer service.

ROTATE A-C	Strongly disagree	1	2	3	4	5	6	7	8	Strongly agree
	0									9
A. If I don't get the result I want, my customer service experience is automatically a bad one.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. The important thing about a customer service experience is to come to a conclusion, whether that conclusion favors me or not.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C. The behavior of a customer service entity doesn't matter as long as I get the outcome I want.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

X. REFLECTIONS ON IRS CUSTOMER SATISFACTION

[ASK IF CALLER ONLY; IF CONSIDERER, SKIP TO D1]

Q21. Thinking back to your most recent experience with the IRS' Practitioner Priority Service line, what aspect of the experience did you find most satisfying?

- 0. Nothing
- 1. **[INSERT RESPONSE]**
- 998. Don't know

Q22. Thinking back to your most recent experience with the IRS' Practitioner Priority Service line, what aspect of the experience did you find most dissatisfying?

- 0. Nothing
- 1. **[INSERT RESPONSE]**
- 998. Don't know

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XI. ADDITIONAL DEMOGRAPHICS

D1. Which of the following categories includes your age?

1. 18-24
2. 25-34
3. 35-44
4. 45-54
5. 55-64
6. 65 or older

D2. What is your gender?

1. Male
2. Female

Attachment C: Tax Preparer Email Invitation to Participate

Below is an example of a typical survey invitation:

Sender: e-Rewards

Subject: Get Rewarded for Your Time - Study about (General topic to command interest without generating bias.)

Body: Based on your eRewards profile, you are invited to earn eRewards Currency for participating in a research survey. If you qualify and complete the survey:

Full reward amount: XX in eRewards Currency

Full survey length: approximately XX minutes

Attachment D: CASRO standards for Respondent Privacy

