

TAC Customer Expectations Survey

OMB # 1545-1432

Expectations Survey for Local IRS Office

The overall goal of this research is to help the IRS provide better service to the public. You can help the IRS improve its service to you and other taxpayers by answering the questions below. This voluntary survey takes about 10 minutes to complete. Your responses will be kept confidential.

1. In the past **two years**, about how many times have you visited a local IRS office such as this one (including today's visit)?

- This is my **first visit** to a local IRS office.
- My last visit to an IRS office was more than **two years** ago.
- 2 - 3 times
- 4 - 5 times
- More than 6 times
- Don't Know

2. Why are you visiting the local IRS office today? Please mark your **main issue** in column A and any **other issues** in column B.

	Column A Main Issue (Mark only <u>one</u>.)	Column B Other Issues (Mark all that apply.)
Tax Issues		
Get tax forms or publications	<input type="checkbox"/>	<input type="checkbox"/>
Make a payment	<input type="checkbox"/>	<input type="checkbox"/>
Set up a payment plan	<input type="checkbox"/>	<input type="checkbox"/>
Have a tax return prepared	<input type="checkbox"/>	<input type="checkbox"/>
Resolve an IRS notice or letter	<input type="checkbox"/>	<input type="checkbox"/>
Get a copy of a prior year return	<input type="checkbox"/>	<input type="checkbox"/>
Get an answer to a tax law question (not including notice you received)	<input type="checkbox"/>	<input type="checkbox"/>
Find out about a tax refund	<input type="checkbox"/>	<input type="checkbox"/>
Get a lien or levy released	<input type="checkbox"/>	<input type="checkbox"/>
Drop off a completed tax return	<input type="checkbox"/>	<input type="checkbox"/>
Apply for Individual or Employer Tax ID (W-7/ITIN, EIN)	<input type="checkbox"/>	<input type="checkbox"/>
Other (please specify): _____	<input type="checkbox"/>	<input type="checkbox"/>

3. How did you learn about local IRS offices, like this one? (Mark all that apply.)

- | | |
|--|---|
| <input type="checkbox"/> IRS telephone representative | <input type="checkbox"/> Volunteer tax preparation clinic |
| <input type="checkbox"/> IRS web site | <input type="checkbox"/> Friend, family member, co-worker |
| <input type="checkbox"/> Other IRS representative | <input type="checkbox"/> Saw the office |
| <input type="checkbox"/> Tax preparation company (e.g., H&R Block, Jackson-Hewitt) | <input type="checkbox"/> Telephone book |
| <input type="checkbox"/> Accountant / tax professional | <input type="checkbox"/> Other (please specify): _____ |

4. About how long did it take you to travel to this local IRS?

- | | |
|--|---|
| <input type="checkbox"/> 0 – 15 minutes | <input type="checkbox"/> 46 – 60 minutes |
| <input type="checkbox"/> 16 – 30 minutes | <input type="checkbox"/> More than 1 hour |
| <input type="checkbox"/> 31 – 45 minutes | |

5. From where did you travel to this local IRS office?

- | | |
|---------------------------------|--|
| <input type="checkbox"/> Home | <input type="checkbox"/> Personal errands |
| <input type="checkbox"/> Work | <input type="checkbox"/> Other (please specify): _____ |
| <input type="checkbox"/> School | |

6. About how long are you **willing to travel** to a local IRS office?

- | | |
|--|---|
| <input type="checkbox"/> 0 – 15 minutes | <input type="checkbox"/> 46 – 60 minutes |
| <input type="checkbox"/> 16 – 30 minutes | <input type="checkbox"/> More than 1 hour |
| <input type="checkbox"/> 31 – 45 minutes | |

7. When visiting a local IRS office, how important are the following aspects of the visit? Please mark the appropriate box on the scale (where 5 means “Very Important” and 1 means “Not Important”).

	Very Important			Not Important	
	5	4	3	2	1
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Aspects of Visit	_____				
Convenient location	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Short wait time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to get issue resolved today	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Available parking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Open hours fit my schedule	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Easy to locate the office	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Getting bilingual assistance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Professionalism and courtesy of staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Building conditions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

8. How much do you agree with the following statements? Please mark the appropriate box on the scale (where 5 means “Strongly Agree” and 1 means “Strongly Disagree”).

Statements	Strongly Agree		3	2	Strongly Disagree	
	5	4			1	
Service should be provided on a first come, first served basis.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I want the ability to schedule an appointment to speak with a representative.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Certain issues/tasks should have an express lane. Which issues/tasks (please specify): _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

9. Do you expect to resolve your **main issue** during today’s visit?

- Yes
- No
- Don’t know

10. About how long do you think you will wait **before** meeting with an IRS representative to discuss your issue(s)?

- Immediately (no wait)
- 1 to 5 minutes
- 6 to 10 minutes
- 11 to 20 minutes
- 21 to 30 minutes
- More than 30 minutes

11. About how long are you **willing to wait** before meeting with an IRS representative to discuss your **main issue**?

- Immediately (no wait)
- 1 to 5 minutes
- 6 to 10 minutes
- 11 to 20 minutes
- 21 to 30 minutes
- More than 30 minutes

12. After you start talking to an IRS representative, about how long do you think it will take to complete your **main issue**?

- Less than 5 minutes
- 5 to 10 minutes
- 11 to 20 minutes
- 21 to 30 minutes
- More than 30 minutes

13. What information, products, and/or services do you think **should be** available at the local IRS office? (Mark all that apply.)

- | | |
|---|--|
| <input type="checkbox"/> Resolving an IRS notice or letter | <input type="checkbox"/> Getting assistance with Schedule C (Profit or Loss from Business) |
| <input type="checkbox"/> Having a tax return prepared | <input type="checkbox"/> Getting assistance with Schedule D (Capital Gains and Losses) |
| <input type="checkbox"/> Making a payment | <input type="checkbox"/> Getting assistance with Schedule E (Rental Property) |
| <input type="checkbox"/> Setting up a payment plan | <input type="checkbox"/> Getting assistance with Schedule F (Profit or Loss from Farming) |
| <input type="checkbox"/> Getting a copy of a prior year return/account transcript | <input type="checkbox"/> Getting reporting tips |
| <input type="checkbox"/> Getting a lien or levy released | <input type="checkbox"/> Other (please specify): |
| <input type="checkbox"/> Getting tax forms and publications | _____ |
| <input type="checkbox"/> Getting an answer to a tax law question | |
| <input type="checkbox"/> Getting information on debt cancellation | |
| <input type="checkbox"/> Getting information on estates and trusts | |
| <input type="checkbox"/> Getting answers to depreciation questions | |

14. Thinking about your **main** reason for visiting today, how likely would you be to use a computer at a local IRS office to complete your business instead of talking to a representative in-person?

- | | |
|--|--|
| <input type="checkbox"/> Very likely | <input type="checkbox"/> Somewhat <u>U</u> nlikely |
| <input type="checkbox"/> Somewhat likely | <input type="checkbox"/> Very <u>U</u> nlikely |
| | <input type="checkbox"/> Don't Know |

Demographics

15. What is the zip code where you currently live? (Please write your five digit zip code below.)

16. What category describes your current age?

- | | |
|--|---|
| <input type="checkbox"/> 24 years or under | <input type="checkbox"/> 45 to 54 years |
| <input type="checkbox"/> 25 to 34 years | <input type="checkbox"/> 55 to 64 years |
| <input type="checkbox"/> 35 to 44 years | <input type="checkbox"/> 65 years or over |

17. What is the highest level of education you have completed?

- | | |
|--|---|
| <input type="checkbox"/> Less than 9 th grade | <input type="checkbox"/> Technical or vocational school graduate / Associate's Degree |
| <input type="checkbox"/> 9 th grade to 12 th grade, no diploma | <input type="checkbox"/> Some college, no degree |
| <input type="checkbox"/> High school graduate/GED | <input type="checkbox"/> Bachelor's Degree |
| <input type="checkbox"/> Some technical/vocational school | <input type="checkbox"/> Post-Graduate Degree |

Please continue on next page

18. What category best describes your household income from all sources, before taxes, for 2008?

- Less than \$15,000
- \$15,001 to \$25,000
- \$25,001 to \$35,000
- \$35,001 to \$45,000
- \$45,001 to \$55,000
- \$55,001 to \$70,000
- \$70,001 or over

19. What is your primary language?

- English
- Spanish
- Chinese
- Vietnamese
- Korean
- Russian
- Other (please specify): _____

20. When going to a local IRS office, you have certain expectations about the visit. Please name the three (3) expectations that are the most important to you.

- 1. _____
- 2. _____
- 3. _____

Please Stop!
You have completed the pre-service survey questions.
Please complete the remaining questions after you have completed your business.

Post-Service Survey Questions - Answer After Completing Business

21. Were your expectations for the following aspects of a visit to a local IRS office met during today’s visit? Please mark the appropriate box on the scale where 5 means “Much Better Than Expected” and 1 means “Much Worse Than Expected”.

	Much Better Than Expected		Just as Expected		Much Worse Than Expected	
	5	4	3	2	1	
Aspects of Visit						
Convenient location	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Short wait time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to get issue resolved today	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Available parking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Open hours fit my schedule	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Easy to locate the office	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Getting bilingual assistance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Professionalism and courtesy of staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Building conditions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall , were your expectations for the visit met?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

22. About how long did you **actually wait** before meeting with an IRS representative today?

- Immediately (no wait)
- 1 to 5 minutes
- 6 to 10 minutes
- 11 to 20 minutes
- 21 to 30 minutes
- More than 30 minutes

23. After you started talking to an IRS representative, about how long did it **actually take** to complete your **main issue**?

- Less than 5 minutes
- 5 to 10 minutes
- 11 to 20 minutes
- 21 to 30 minutes
- More than 30 minutes

24. Was your **main issue** resolved today?

- Yes
- No

25. Thinking about your visit to the local IRS office today, did you have any expectations that were not met?

- 1. _____
- 2. _____
- 3. _____

26. How can the IRS improve the service provided at local IRS offices such as this one?

- 1. _____
- 2. _____
- 3. _____

Thank you for completing this survey.
Please return the questionnaire to the survey administration table located near the entrance of this local IRS office.

Paperwork Reduction Act Notice

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is 1545-1432. If you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to: Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224.

Privacy Statement

The authority requesting the information is 5 USC 301. The primary purpose of asking for the information is to determine steps IRS can take to improve our service to you. The information may be disclosed as authorized by the routine uses published for the Privacy Act System of Records entitled, Treas/IRS 00.001 Correspondence Files, including Stakeholder Partnership File, and Correspondence Control Files, as published in the Federal Register: December 10, 2001 (Volume 66, Number 237)] [Notices] pages 63785-6. Providing the information is voluntary. Not answering some or all of the questions will not affect you.