

IRS Small Business/Self Employed Correspondence (Campus) Exam (CCE) Improvement
Instructions for Tax Examiners Conducting CCE Toll-Free Phone Survey
Pilot Telephone Customer Satisfaction Survey

Tax Examiner Responsibilities

1. When the call you are assisting has been selected for the survey, you will hear a "notify" tone in your headset and your ASPECT Teleset will show "SURVEY".
2. Complete your call as usual.
3. After the call is complete, read the following script exactly as written:
"This call has been randomly selected to participate in a brief survey regarding the service you received today. Your answers will help improve the service customers receive when they call the IRS. The survey will take less than 3 minutes. Would you like to participate in the survey?"
4. Please see the "handling taxpayer concerns" section below to answer any taxpayer concerns about the survey.
5. If the caller declines to participate, thank him/her and terminate the call.
6. If the caller agrees to participate, say the following: **"Thank you for agreeing to take this survey. To make sure that your answers are combined with those of other taxpayers and are not linked to your account, we are directing your call to another person who will administer the questionnaire. Please hold for a few seconds while I transfer your call."**
7. If the caller does NOT agree to participate, say the following: "Is there anything else I can help you with today?"

Handling taxpayer concerns

If the taxpayer

1. Expresses concern about how they were selected
Respond: "Your call was randomly selected prior to your calling the IRS."
2. Expresses concern for confidentiality
Respond: "Your responses will be combined with those of other taxpayers and will be reported only in statistical totals. No individual answers will be reported and survey responses will have no effect on individual tax accounts."
3. Asks how the information will be used
Respond: "The IRS is trying to improve its service to the American public. A first step in this process is to gather reliable information from those who've had contact with the IRS."
4. Expresses concern for reprisal
Respond: "You will not be identified or penalized whether or not you decide to participate."
5. Asks to be called back later

Respond: "We would be unable to call you back at a later time. This is the only opportunity we have to gather your feedback."