

Appendix F

Automated Collection System W&I Questionnaire

ACS W&I Questionnaire—Page 1

ACS Wage and Investment
Revised 9-13-04
Adjustment of open-ended questions
Moved Question 7

(For IRS administrator) Thank you for calling the ACS Wage and Investment Survey.

Please enter your five-digit site code.

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

- For completely resolved, press 1
- For partially resolved, press 2
- For not resolved, press 3

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

- For Levy, press 1
- For Lien, press 2
- For a Balance Due other than Levy or Lien, press 3
- For a Letter, press 4
- For Taxpayer Assistance, press 5
- For Payment Verification, press 6
- For an Un-Filed Return, press 7
- For an Appeal, press 8

Thank you. Please transfer caller now.

(For Respondent)

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

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

Quality of Service Section

Caller hears: Thank you for participating in this voluntary survey. This survey allows taxpayers to provide anonymous and confidential information to assist the IRS in improving its services. It will take less than 10 minutes to complete. During this survey you will be asked to rate the service you received from the IRS during this call.

Please rate the following questions using the following scale:

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

Press the star key to repeat the question.

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- Question 1 Did this call relate to a notice, bill, or letter you received recently from the IRS?
If yes, press 1
For no, press 2 (Skip to Q4)
If you are not sure, press 9
- Question 2 Please rate your level of satisfaction with the clarity of the notice, bill, or letter.
- Question 3 Please rate your level of satisfaction with the tone of the notice, bill, or letter.
- Caller hears** The following questions have to do with the IRS's automated answering system. The response scale is the same. You may enter your response as soon as you know your answer.
- Question 4 Rate your satisfaction with the ease of understanding the automated answering system menu and instructions.
- Question 5 Rate your satisfaction with the time it took to get through to the IRS using the automated answering system.
- Question 6 Rate your satisfaction with how well the automated answering system directed you to the correct person.
- Caller hears** The following questions have to do with the IRS representative with whom you spoke. If you spoke to more than one representative, please consider the one with whom you spent the most time on the phone.
- Question 7 Rate your satisfaction with the friendliness of the representative who handled your call.
- Question 8 Rate your satisfaction with the representative's willingness to help you with your issue.
- Question 9 Rate your satisfaction with the fairness with which you were treated.
- Question 10 Rate your satisfaction with the knowledge of the representative.
- Question 11 Rate your satisfaction with authority of the representative to make decisions regarding your issue.
- Question 12 Rate your satisfaction with getting all the information you needed during the call.
- Question 13 Rate your satisfaction with the length of time it took to complete your call from when you first reached a representative.
- Question 14 If you think the time you spent on the phone with the representative was too short, press 1. If you think it was too long, press 2. If the time spent with the representative was just right, press 3.
If select 1 or 2 go to question 14a. If select 3, skip to question 15.
- Question 14a Why do you feel the time you spent with the IRS representative was not the appropriate length? Begin speaking at the tone. Press any key when you are finished.

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- Question 15 Rate your satisfaction with the representative's description of what was expected of you.
- Question 16 Rate your satisfaction with the representative's description of what will happen if you do not take those actions.
- Question 17 Rate your satisfaction with the flexibility of the representative in handling your issue.
- Question 18 Were you requested to follow-up on this issue at a later date?
Yes (1) Go to Q19
No (2) Go to Q20
- Question 19 Rate your satisfaction with the amount of time you were given today to follow-up with the IRS on this issue.
- Question 20 Everything considered, whether you agree or disagree with the final outcome, rate your overall satisfaction with the service you received during this call.
All responses...go to 20a
- Question 20a Do you have any other comments or suggestions for the IRS regarding your experience today? Begin speaking at the tone. Press any key when you are finished.

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

- Question 21 At the completion of your phone call, did you feel your issues were resolved?
If you feel they were completely resolved, press 1...skip to question 22
For partly resolved, press 2...go to question 21a
For not resolved, press 3...go to question 21a
If you are not sure, press 9... skip to question 22
- Question 21a Why do you feel the issue was not completely resolved? Begin speaking at the tone.
Press any key when you are finished.

- Question 22 Not counting this survey, how many people at the IRS did you speak to during this call?
Press 1 through 4 for the number of people you spoke with
If you spoke with 5 or more, press 5
If you are not sure, press 9
- Question 23 How many minutes did you spend on this call including any time on hold, but not including the time spent answering this survey?
If less than 10 minutes, press 1
10 to 20 minutes, press 2
21 to 30 minutes, press 3
31 minutes or longer, press 4

Demographic Questions

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- Question 24 If you called today as an individual taxpayer, press 1.....skip to Q28
A business taxpayer, press 2.....go to Q25
An exempt organization, press 3.....skip to TEXT BEFORE Q31
Or a tax practitioner, press 4.....skip to Q26
- Question 25 For businesses with assets less than 5 million dollars, press 1
Otherwise, press 2.....skip to TEXT BEFORE Q31
- Question 26 As a tax practitioner, if you are representing an individual who filed a short form, press 1...skip to TEXT BEFORE Q31
An individual who filed a long form with no small business, farm, or supplemental income, press 2...skip to TEXT BEFORE Q31
An individual who filed a long form with small business, farm, or supplemental income, press 3...skip to TEXT BEFORE Q31
A business taxpayer, press 4
Or an exempt organization, press 5...skip to TEXT BEFORE Q31
- Question 27 If you are representing a business with assets less than 5 million dollars, press 1
Otherwise, press 2.....skip to TEXT BEFORE Q31
- Question 28 If you filed short form 1040EZ, press 1.....skip to TEXT BEFORE Q31
If you filed short form 1040A (did not itemize deductions), press 2.....skip to TEXT BEFORE Q31
If you filed long form 1040 without other forms or schedules, press 3.....skip to TEXT BEFORE Q31
If you filed long form 1040 with other forms or schedules, press 4
If you don't remember which form you filed, press 5.....skip to TEXT BEFORE Q31
- Question 29 If you reported income or losses from a farm or business you own, press 1
From rental property, press 2
From royalties, press 3
From a partnership or S Corporation, press 4
From an estate or trust, press 5
If you don't remember, press 6
- Question 30 If you filed a Form 2106 for employee business expenses, press 1
Otherwise, press 2
- End Section**
- Caller hears That completes the survey; however, we are required by law to report to you the OMB Control Number for this public information request. That number is XXXX-XXXX. In addition, if you have any comments about the time used to complete this survey or ways to improve the survey, you may write to the IRS.
- Question 31 Would you like the address to mail your comments?
If yes, press 1
If no, press 2
- If yes, the caller hears:
Mail your comments to:
Tax Forms Committee
Western Area Distribution Center
Rancho Cordova, CA 95743
- Question 31a To repeat this address, press 1.

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Otherwise, press 2.

Question 32 If you have tried unsuccessfully to resolve a problem with the IRS or if you have a complaint, you may contact the Taxpayer Advocate's office by calling a toll-free telephone number. If you would like the telephone number of the Taxpayer Advocate, press 1. Otherwise, press 2.

If 1, the caller hears:

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

Question 32a To repeat this telephone number, press 1.
Otherwise, press 2.

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

Survey End