

**IRS Wage and Investment
The Collection Operation
Customer Satisfaction Phone Survey
2009**

Sample elements:

AREA CODE AND TELEPHONE NUMBER:
DATE AND TIME OF INTERVIEW:
SITE CODES:

Introduction:

Hello, this is _____, calling from Pacific Market Research on behalf of the Internal Revenue Service. We are contacting taxpayers who have recently received mail correspondence from the IRS about collecting your taxes or an unfiled return. The IRS is interested in getting your feedback about how well you were served so that they can improve their customer service to you.

S1. May I please speak with (name on the list)?

- 1 Yes, respondent available - **(Continue)**
- 2 No such person - **(Thank and terminate, save case ID)**
- 3 Respondent not available/Not a good time - **(Set time to call back)**
- 4 Soft refusal - **(Set time to call back)**
- 5 Hard refusal - **(Thank and terminate)**

S2. The letter you received was from the Collection Operation of the IRS. Can you verify that you are the person who received this mail from the IRS?

- 1 Yes - **(Skip to S3)**
- 2 No - **(Ask for appropriate respondent)**
- 3 (DK) **(Thank and terminate)**
- 4 (Refused) - **(Thank and terminate)**

(INTERVIEWER NOTE: If person referred to is at a different phone number, record the following information). Terminate call and call phone number of person who interacted with the COLLECTION OPERATION.

NAME:

RELATIONSHIP TO TAXPAYER:

PHONE NUMBER:

R1. **(For referrals only)** May I please speak with (name of the person referred)?

- 1 Yes, respondent available - **(Continue)**
- 2 No such person - **(Thank and terminate, save case ID)**
- 3 Respondent not available/Not a good time - **(Set time to call back)**
- 4 Soft refusal - **(Set time to call back)**
5. Hard refusal - **(Thank and terminate)**

R2. This is _____, calling from Pacific Market Research, on behalf of the Internal Revenue Service. We are contacting taxpayers who have recently received mail correspondence from the IRS about collecting their taxes or an unfiled return. The IRS is interested in getting your feedback about how well taxpayers were served so that they can improve their customer service.

You have been referred to us by (name of the taxpayer) as the person who handled his/her mail correspondence with the IRS. Is that correct?

- 1 Yes - **(Skip to S3)**
- 2 No - **(Ask for appropriate respondent)**
- 3 (DK) **(Thank and terminate)**
- 4 (Refused) - **(Thank and terminate)**

S3. Your opinion is very important to the IRS and will help the IRS improve its service to the public. The survey will take less than 10 minutes to complete. Your response will be kept strictly confidential. Would you like to participate?

1. Yes **(Proceed to survey)**
2. No **(Soft refusal) (Set time to call back)**
3. (DK) **(Set time to call back)**
4. (Refused) **(Thank and terminate)**

I'm going to read a list of items about your opinion regarding how the IRS handled your written correspondence **regarding a proposed balance due or an unfiled return**. For each question, **regardless of whether you agree or disagree with the final outcome of the tax issue**, please indicate your opinion by choosing a number from 1 to 5, where 1 means "Very Dissatisfied" and 5 means "Very Satisfied." If a question does not apply to you, please state so.

How satisfied are you with the:

Q1a. Ease of understanding the initial notice?

- 5 Very satisfied
- 4 Somewhat satisfied
- 3 Neither satisfied nor dissatisfied
- 2 Somewhat dissatisfied, OR
- 1 Very dissatisfied
- 0 Not Applicable

Q1b. Ease of obtaining the information you needed from the Collection Operation?

Q1c. Length of time you were given to respond to the Collection Operation?

Q1d. Ease of understanding the letter you received in response to your written inquiry?

Q1e. Time the Collection Operation took to respond to your written inquiry?

Q1f. Correspondence from the Collection Operation reflecting the current status of your case?

(If code "1" or "2" in Q1f, continue. Otherwise, skip to Q1g.)

Q1f_ver. In what way are you not satisfied with the correspondence from the Collection Operation reflecting the current status of your case?

_____ (Open ended)

Q1g. Correspondence from the Collection Operation addressing all of your issues?

Q1h. Professional tone of the correspondence you received?

Q1i. Explanation of the actions the Collection Operation took to resolve your issue?

Q1j. Ease of setting up a payment plan?

Q1k. Collection Operation keeping you informed of the status of your case?

Q1l. Option of resolving this matter through written correspondence?

Q1m. Fairness of treatment by the Collection Operation?

Q1n. Length of the correspondence collection process, from when you received the initial notice to finish?

Q2. Did you call the phone number listed in the initial notice from the Collection Operation?

- Yes
- No

(If "Yes" in Q2, continue. Otherwise, skip to Q3.)

If yes, how satisfied are you with the:

Q2a. Length of time it took you to get through to an IRS employee?

- 5 Very satisfied
- 4 Somewhat satisfied
- 3 Neither satisfied nor dissatisfied
- 2 Somewhat dissatisfied, OR
- 1 Very dissatisfied
- 0 Not Applicable

Q2b. Courtesy of the IRS representative?

Q2c. Knowledge of IRS representative?

Q3. Regardless of whether you agree or disagree with the final outcome, on the same scale, please rate your overall satisfaction with the way your tax issue was handled by the Collection Operation. **(If necessary, repeat scale)**

- 5 Very satisfied
- 4 Somewhat satisfied
- 3 Neither satisfied nor dissatisfied
- 2 Somewhat dissatisfied
- 1 Very dissatisfied
- 0 Not applicable

(If code "1" or "2" in Q3, continue. Otherwise, skip to Q4.)

Q3_ver. Please tell us what could have been done differently to improve the way the correspondence collection process is handled:

_____ (Open ended)

Q4. Did you request information from the IRS?

- Yes
- No (Skip to Question 7)

Q5. If yes, how did you request this information [Multiple Response]?

- Mail

- Email
- Phone
- In Person
- IRS Web site

Q6. When replying to your inquiry, did the IRS respond within **45** days?

- Yes
- No
- Did not receive a reply

Q7. Was your issue with the IRS completely resolved?

- Yes
- No (Skip to Q9)
- Not Sure (Skip to Q9)

Q8. Was your issue resolved via phone contact?

- Yes
- No

Q9. Did you agree with the outcome of your case?

- Yes
- No
- Not Sure

Q10. Are you? **(Read list, and select one.)**

- The taxpayer.
- A tax professional who represented the taxpayer.
- Someone else who represented the taxpayer.

Q11. Do you have any suggestions or comments you would like to make to the Collection Operation?

_____ (Open ended)

Focus Group Recruiting Question

Q12. Occasionally, we conduct additional in-depth research. Participants may receive a small monetary incentive to participate. Would you be interested in participating in future research?

- 1 Yes
- 2 No (Skip to closing)

Q12.1. Would you please provide me with your phone number, best time to call and/or your email so we can contact you when future research comes up?

Phone Number _____ [Note to Interviewers: Please repeat the phone number to taxpayer instead of asking the taxpayer to repeat it]

Best Time to Call _____ (CATI: Allow time range)

Email _____

CLOSING COMMENTS

That completes the survey. We are required by law to provide you with the OMB (Office Of Management and Budget) Control Number for this public information request. That number is 1545-1432. In addition, if you have any comments about the time estimate to complete the survey or ways to improve the survey, you may write to the IRS. Would you like the address?

(IF YES, ADDRESS IS...)

Internal Revenue Service
Tax Product Coordinating Committee
1111 Constitution Avenue, NW
Washington, DC 20224

**(VALIDATE PHONE NUMBER AND
THANK RESPONDENT BY SAYING:)**

Again, this is _____, with Pacific Market Research on behalf of the IRS COLLECTION OPERATION function. Thank you for your time.