

IRS AUR Improvement Phased Rollout

Instructions for **Tax Examiners** Conducting AUR 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 5 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. When transfer call: give the survey interviewer the taxpayer's TIN before transferring the taxpayer.
8. 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 before you spoke with anyone at 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."

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Instructions for **Survey Interviewers** Conducting AUR Telephone Customer Satisfaction Survey

Handling taxpayer concerns

If the taxpayer

1. Expresses concern about how they were selected
Respond: "Your call was randomly selected before you spoke with anyone at 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."

Phone Survey

Control Number *

READ: Thank you for participating in this voluntary survey. This survey allows taxpayers to provide information to assist the IRS in improving its telephone services. Your responses will be combined with those of other taxpayers and will be reported only in statistical totals. No individual answers will be reported. It will take less than 5 minutes to complete. During this survey you will be asked to rate the service you received from the IRS during this call regarding your case within Automated Under Reporting.

Q1. Why did you call this Toll Free number today? Was it to...?



- 1. Get answers or explanation about the Notice you received?
- 2. Inquire if the IRS received your correspondence?
- 3. Request an extension of time to respond?
- 4. Confirm the address, fax, or other contact information for your response or inquiry?
- 5. Communicate why you disagree or have an issue with the amount in the Notice?
- 6. Follow up on a previous call you made?
- 7. Other (Specify)
- Specify your own value:

Q2. Please rate your satisfaction with the ability of the agent to answer your questions; using a scale of 1 to 5, where 1 is Very Dissatisfied and 5 is Very Satisfied.



- 5 Very Satisfied
- 4 Somewhat Satisfied
- 3 Neither Satisfied nor Dissatisfied
- 2 Somewhat Dissatisfied
- 1 Very Dissatisfied
- 9 Not Sure

Q3. Please rate the degree to which your case was resolved during the phone call. Would you say your case was...(READ RESPONSES)



- 3 Completely Resolved (Go to Q5)
- 2 Partially Resolved (Go to Q4)
- 1 Not Resolved (Go to Q4)
- 9 Don't Know (DO NOT READ)(Go to Q5)

Q4. What could the IRS have done to resolve or help you resolve your case?

Phone Survey

Q5. How complete was the agent in explaining what actions you need to take to resolve your case?
Was the agent...(READ RESPONSES)



- 5 Very Complete
- 4 Somewhat Complete
- 3 Neither Complete nor Incomplete
- 2 Somewhat Incomplete
- 1 Very Incomplete
- 9 Not Sure (DO NOT READ)

Q6. Did the agent explain the timelines involved in handling your case?



- 2 Yes
- 1 No
- 9 Not Applicable (DO NOT READ)

Q7. Please rate your satisfaction with how the agent listened to and understood your situation.
Again, on a scale of 1 to 5 where 1 is Very Dissatisfied and 5 is Very Satisfied.



- 5 Very Satisfied
- 4 Somewhat Satisfied
- 3 Neither Satisfied nor Dissatisfied
- 2 Somewhat Dissatisfied
- 1 Very Dissatisfied
- 9 Not Sure

Q8. Everything considered, please rate your overall satisfaction with the service you received during this call.
On the same scale of 1 to 5.



- 5 Very Satisfied
- 4 Somewhat Satisfied
- 3 Neither Satisfied nor Dissatisfied
- 2 Somewhat Dissatisfied
- 1 Very Dissatisfied
- 9 Not Sure

Q9. Including today, how many times have you called the IRS about this particular issue?



Phone Survey

Q10. How many minutes did you spend on this call starting from the time you were connected to a live agent (but not including the time to take this survey)?

Did you spend...(READ RESPONSES)



- 1 Less than 5 minutes
- 2 More than 5 minutes but less than 10 minutes
- 3 More than 10 minutes but less than 20 minutes
- 4 More than 20 minutes
- 9 Not Sure (DO NOT READ)

Q11. Are you the taxpayer or the taxpayer's representative?



- 1 Taxpayer
- 2 Taxpayer's Representative
- 9 Not Applicable (DO NOT READ)

Q12. Please rate your level of frustration with this tax issue prior to making this call.

Were you...(READ RESPONSES)



- 3 Very Frustrated
- 2 Somewhat Frustrated
- 1 Not at all Frustrated
- 9 Not Sure (DO NOT READ)

That completes the survey; however, we are required by law to provide you the OMB Control number for this public information request. That number is 1545-1432.

In addition, if you have any comments about the time needed to complete this survey or ways to improve the survey, you may write to the IRS at:

Internal Revenue Service
Tax Products Coordinating Committee
SE:W:CAR:MP:T:T:SP
1111 Constitution Ave, NW
Washington, DC 20224

Thank you for participating in this survey. Your information will help improve the services provided by the IRS. Thank you and have a great day!

* indicates a required field

Phone Survey