

IRS Wage and Investment
Automated Collection System Correspondence Support (ACS Support)
Customer Satisfaction Phone Survey

Sample elements:

AREA CODE AND TELEPHONE NUMBER:

DATE AND TIME OF INTERVIEW:

SITE CODES:

Introduction 1:

Hello, this is _____, calling from Pacific Market Research.

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)**

Introduction 2:

I am conducting a survey on behalf of the Internal Revenue Service. We are contacting taxpayers who have recently received mail correspondence from the IRS about a balance due or an unfiled return. The IRS is interested in getting feedback about how well taxpayers were served so that they can improve their customer service to the public.

S2. Did you receive a letter from the IRS about **a balance due or an unfiled return?**

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

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. I am conducting a survey on behalf of the Internal Revenue Service We are contacting taxpayers who have recently received mail correspondence from the IRS about a balance due or an unfiled return. The IRS is interested in getting 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)**

No - **(Ask for appropriate respondent)**

(DK) **(Thank and terminate)**

(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 anonymous. Would you like to participate?

- Yes **(Proceed to survey)**
 No **(Soft refusal) (Set time to call back)**
 (DK) **(Set time to call back)**
 (Refused) **(Thank and terminate)**

I'm going to read a list of items about your opinion regarding how the IRS handled your written correspondence. 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. Again, please consider only your interactions with the IRS through **written** correspondence regarding a balance due or an unfiled return within the last 90 days .How satisfied are you with:

Q1a The ease of understanding the latest correspondence you received?

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

Q1b. The professional tone of the correspondence you received?

Q1c. The ease of obtaining information from the IRS?

Q1d. The issue was adequately addressed by the IRS in response to your written inquiry?

Q1e. The time you were given to respond to the IRS?

Q1f. The ease of resolving this matter through written correspondence?

Q1h. The explanation of what records and/or additional paperwork you needed to send?

Q1i. The consideration IRS gave to the records and /or additional paperwork that you mailed.?

(If code "1" or "2" in Q1i, continue. Otherwise, skip to Q1j.)

Q1i_ver. In what way are you not satisfied with the consideration IRS gave to the records and/or supporting documents that you mailed?

_____ (Open ended)

Q1k. The time the IRS took to respond to your written inquiry?

Q1l. The completion of actions promised by the IRS?

Q1m. How satisfied are you with the understanding that you have payment options?

Q1n. The fairness of treatment by the IRS related to this issue?

Q1o. How satisfied are you with the IRS notifying you of how your case was resolved?

(If code "1" or "2" in Q1o, continue. Otherwise, skip to Q1p.)

Q1o_ver. In what way are you not satisfied with the IRS notifying you of how your case was resolved?

_____ (Open ended)

Q1p. How satisfied are you with the length of time it took to resolve your case, from the time you made your inquiry in writing until you received a written response?

Q2. 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 IRS during this latest contact. **(If necessary, repeat scale)**

- 5 Very satisfied
- 4 Somewhat satisfied
- 3 Neither satisfied nor dissatisfied
- 2 Somewhat dissatisfied

Very dissatisfied

0 Not applicable

Q3. Did you agree or disagree with the outcome?

Agreed

Disagreed

Not Sure

Q4. Deleted.

Focus Group Recruiting Question

Q5. 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?

Yes

No (Skip to Q6)

Q5.1. 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 _____

Q6 Do you have any suggestions or comments you would like to make to the IRS regarding how they could improve service during this latest contact?

_____ (Open ended)

If you have been unable to resolve any specific problems with your tax matter through the normal IRS channels, or now face a significant hardship due to the application of the tax law, you may contact the Taxpayer Advocate Service at 1-877-777-4778.

CLOSING COMMENTS

That completes the survey. We are required by law to report to you 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 ACS Support function.
Thank you for your