

Attachment B

SIS Survey Instructions

Prior to the embedded survey

The following will appear in the email message just above the embedded survey:

Thank you for agreeing to participate in the Statistical Information Services (SIS) Office customer satisfaction survey. The survey will help us measure your satisfaction with the service we most recently provided to you and will help us identify areas in which we need improvement. We would appreciate it if you would take a few minutes to complete and return our survey.

Completion of this survey is entirely voluntary. All of the information you provide on the survey will be kept private as allowed by law. We estimate that the survey should take 5 minutes to complete.

In order to complete this survey, click on the reply button and scroll down to the survey. Enter an "x" in the box next to your selected response, or type your answer in the space provided. Once you have completed the survey, just click the send button.

If you cannot view this survey within your email program, please use the Excel file attached below to complete the survey. Instructions on how to complete and return the Excel version of this survey are located within the file.

If you prefer, you may also fax your completed survey to the SIS office. See the file attached below for details.

Prior to the file survey

The following will appear within the Excel file attached to the email, just above the survey:

In order to complete this version of the SIS survey, please save this file prior to entering your responses. Once you have saved the file, enter an "x" in the box next to the chosen response, or type your answer in the space provided. Once you have completed the survey, save the file again. Go back to the original email from the SIS office and click the reply button. Attach the saved survey file to that email and click the send button.

If you prefer, you may also fax your completed survey to the SIS office. Just complete the survey below and fax it to the SIS office at (202) 874-0964.

Attachment C

SIS Survey Scripts

Phone script:

This would be read to them just after responding to their question(s), before officially ending the call.

Read:

The SIS office would appreciate it if you would participate in our customer satisfaction survey. The survey will help us measure your satisfaction with the service we just provided and will help us identify areas in which we need improvement. To participate in the survey, we will need to either email or fax it to you. We would appreciate it if you would take a few minutes to complete and return our survey.

Completion of the survey is entirely voluntary. We estimate that the survey should take 5 minutes to complete.

Are you willing to complete the survey?

If the person **refuses** to participate, you may end the call at this point:

Thank you for your time. Goodbye.

If the person **agrees** to participate, take their information and then proceed, Read:

Thank you. In order for you to participate in the survey, we will need your email address or fax number. Could you please provide us with one of these at this time?

To return the survey, please email or fax it back to us using the information provided on the survey. Please return the survey as soon as possible.

Thank you for your time and assistance. We value your participation in our survey and welcome all comments and suggestions you may have. Goodbye.

Email Script:

This information, along with the survey, should be sent in an email that is separate from the response to their request.

The SIS office would appreciate it if you would participate in our customer satisfaction survey. The survey will help us measure your satisfaction with the service we just provided and will help us identify areas in which we need improvement. We would appreciate it if you would take a few minutes to complete and return our survey.

Completion of the survey is entirely voluntary. We estimate that the survey should take 5 minutes to complete. We have included a copy of the survey directly below, as well as a file copy attached to this email.

To return the survey, please email or fax it back to us using the information provided on the survey. Please return the survey as soon as possible.

Thank you for your time and assistance. We value your participation in our survey and welcome all comments and suggestions you may have.

Follow-up Script:

On the 15th of the month, this message should be sent to customers who received surveys during the previous month.

Recently, the Statistical Information Services Office of the Statistics of Income Division of the IRS sent you a survey regarding your satisfaction with the service we provided in answering your request.

If you have already returned the survey, thank you for your participation. If you have not yet completed the survey, please take a few minutes to do so. We encourage you to respond so that we can use your feedback to improve the services we provide to our customers.

In case you misplaced the survey, we have attached a copy to this email. If you have any questions, please call us at (202) 874-0410 or email us at sis@irs.gov.

Your feedback will be kept private as allowed by law and will allow us to improve our services to you in the future.

Thank you.