

Attachment 1

IVR Questionnaire

IRS.gov IVR Customer Satisfaction Survey

CSR INVITATION SCRIPT:

We would like your feedback regarding your experience during this call. It is important that we hear from customers in a variety of situations to help us identify areas in need of improvement. May I forward you to our automated survey? It usually takes about 2 to 3 minutes to complete. Your participation in this survey is voluntary.

IVR SURVEY INTRODUCTION:

Thank you for staying on the line to complete this brief survey. Please press the # key to begin.

Using the numbers on your touch-tone phone, please answer the following questions about our service. Your answers will be recorded using our automated system. To repeat a question, press the star key. Enter your answer after you hear this tone [beep tone].

For the first few questions, we will use a 7-point scale where 7 means completely satisfied and 1 means not at all satisfied. Higher numbers mean higher satisfaction; lower numbers mean lower satisfaction. You may use any number from 1 to 7. Press 9 at any time to repeat the scale.

[If 9 is pressed at any time during the survey, play the following verbiage] Please use a scale where 7 means completely satisfied and 1 means not at all satisfied. Higher numbers mean higher satisfaction; lower numbers mean lower satisfaction. You may use any number from 1 to 7.

- Q1: How satisfied were you with the time it took to reach a customer service representative?
- Q2: How satisfied were you with the professionalism of the representative?
- Q3: How satisfied were you with the representative's level of knowledge about your specific question or issue?
- Q4: How satisfied were you with the amount of time it took the representative to handle your question or Website issue?
- Q5: Overall, how satisfied were you with today's experience calling the IRS.gov Website Help Desk?
- Q6: Which of the following best describes the purpose of your phone call? Please press . . .
1. e-File or Free File a Tax Return questions
 2. EIN (Employer Identification Number) questions
 3. Forms and publications questions
 4. Exempt Organization questions (Filing requirements, searching etc)
 5. To check the status of your refund
 6. Tax Preparer questions (Registration, training etc)
 7. To obtain general tax information
 8. Other (please specify)
- Q7: Were you referred to the IRS.gov Website help desk by another IRS help line?
1. Yes
 2. No
- Q8: Including today's call, how many total calls have you made regarding this specific Website issue or question? Please press . . .
1. One Call
 2. Two Calls
 3. Three Calls
 4. Four or More Calls

Q9: Was your Website issue handled or your question answered today? Please press . . .

1. Yes
2. No
3. Partially, but not completely
4. Don't know or unsure

If not, what additional actions will you take? Please press...

1. Send an e-mail to the IRS.gov Website Help Desk
2. Contact the IRS.gov Website Help Desk again via telephone
3. Contact the IRS.gov web Site Help Desk via live chat
4. Do not intend to make any additional contacts to the IRS.gov Website Help Desk
5. Contact a Tax Preparer
6. Visit an IRS Walk-in Site
7. Contact an IRS tax line
8. Other

Q10: What could be improved about the service provided to you by the representative over the phone today? Please press . . .

1. Be more patient
2. Listen more carefully
3. Be more friendly
4. Handle issue more quickly
5. Better communicate length of hold time to investigate issue
6. Other
7. No improvement needed

Q11: How likely are you to utilize the telephone Help Desk in the future for assistance with the IRS.gov Website? Please press . . .

1. Definitely will use
2. Probably will use
3. Probably will not use
4. Definitely will not use
5. Neutral

CLOSING SCRIPT:

Thank you for volunteering to participate in our survey. The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is 1545-1432. The time estimated for participation is 3 minutes. If you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to the, Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224.

Attachment 2

eMail Questionnaire

IRS.gov E-MAIL CUSTOMER SATISFACTION SURVEY

Thank you for taking the time to complete this survey regarding your experience with e-mailing the IRS.gov Website Help Desk.

INSTRUCTIONS: Please select your responses from the lists provided by clicking on the appropriate answer with your mouse or typing your responses in the space provided. You can navigate through the survey using the forward and back buttons of your browser as well as the "Next" and "Back" buttons located at the bottom of each survey page. You may need to use the scroll bar, which will appear at the right side or bottom of your screen to view an entire question. Please answer all questions. The survey will not allow you to skip questions that require an answer.

Note: Please **do not** provide any personal information such as your name, Taxpayer Identification Number, Social Security Number, or address. We are not permitted to respond to tax or personally specific inquiries.

Please click the "Next" button below to continue.

Which of the following best describes the reason for your e-mail? *response required

1. e-File or Free File a Tax Return questions
2. EIN (Employer Identification Number) questions
3. Forms and Publications questions
4. Exempt Organization questions (Filing requirements, searching etc)
5. To check the status of your refund
6. Tax Preparer questions (Registration, training etc)
7. To obtain general tax information
8. Other (please specify)

Which of the following best describes you as an IRS.gov Website visitor? *response required

1. Individual
2. Business
3. Charities & Other Non-Profits
4. Government Entities
5. Tax Professionals
6. Retirement Planning Community
7. Tax Exempt Bond Community

Did you refer to any FAQs (frequently asked questions) or Tax Topics before e-mailing the IRS.gov Website Help Desk?

1. Yes
2. No

If yes, how helpful did you find the FAQs or Tax Topics?

1. Extremely Helpful
2. Somewhat Helpful
3. Not Very Helpful
4. Not At All Helpful

5. No Opinion

Which FAQs or Tax Topics did you refer to before contacting the IRS.gov Website Help Desk (Open Ended)?

How easy was it to find the IRS.gov Website Help Desk e-mail address? *response required

1. Very Easy to Find
2. Somewhat Easy to Find
3. Not Very Easy to Find
4. Not At All Easy to Find
5. No Opinion

Comments [Open Ended]

How satisfied were you with the tone of the responses you received from the IRS.gov Website Help Desk e-mail representative? (i.e., friendliness, level of concern, personalization)? *response required

1. 7 = Completely Satisfied
2. 6
3. 5
4. 4
5. 3
6. 2
7. 1 = Not At All Satisfied

Comments [Open Ended]

How satisfied were you with the quality of the responses you received from the IRS.gov Website Help Desk e-mail representative? (i.e. grammar, attention to detail) *response required

1. 7 = Completely Satisfied
2. 6
3. 5
4. 4
5. 3
6. 2
7. 1 = Not At All Satisfied

Comments [Open Ended]

Overall, how satisfied were you with your experience e-mailing the IRS.gov Website Help Desk? *response required

1. 7 = Completely Satisfied
2. 6
3. 5
4. 4
5. 3

6. 2
7. 1 = Not At All Satisfied

Comments [Open Ended]

What could be improved about the service provided to you by the IRS.gov Website Help Desk? *response required

1. Tone of the response
2. Quality of the response
3. Speed of the response
4. Completeness of the response / Answer all of your questions / Address all of your issues
5. No improvement needed
6. Other (Please Specify)

How long did it take the IRS.gov Website Help Desk to respond to your e-mail? *response required

1. 24 hours or less
2. Between 1 and 3 days
3. Between 4 and 7 days
4. More than 7 days
5. Still waiting on a response
6. Don't Know / Not Sure

Was your IRS.gov Website issue resolved or your question answered today? *response required

1. Yes
2. No
3. Partially, but not completely
4. Don't Know / Unsure

If not, what additional actions will you take?

1. Send an additional e-mail to the IRS.gov Website Help Desk
2. Contact the IRS.gov Website Help Desk via telephone
3. Contact the IRS.gov Website Help Desk via live chat
4. Do not intend to make any additional contacts to the IRS.gov Website Help Desk
5. Contact a Tax Preparer
6. Visit an IRS Walk-in Site
7. Contact an IRS tax line
8. Other (please specify)

Including today's session, how many total times have you contacted the IRS.gov Website Help Desk via e-mail regarding this specific Website issue or question? *response required

1. Once
2. Twice
3. Three Times
4. Four or More Times

Where you referred to the IRS.gov Website Help Desk by another IRS help line? *response required

1. Yes
2. No

How likely are you to utilize the IRS.gov Website Help Desk e-mail contact in the

future for assistance with the IRS.gov Website? *response required

1. Definitely Will Use
2. Probably Will Use
3. Probably Will Not Use
4. Definitely Will Not Use
5. No Opinion

Comments [Open Ended]

How likely are you to recommend the IRS.gov Website Help Desk e-mail feature to friends or family who need assistance with the IRS.gov Website? *response required

1. Definitely Will Recommend
2. Probably Will Recommend
3. Probably Will Not Recommend
4. Definitely Will Not Recommend
5. No Opinion

Comments [Open Ended]

In an effort to improve the usability and content on the IRS.gov Website, please tell us where on the IRS.gov Website you looked for answers to your question prior to contacting the IRS.gov Website Help Desk. [Open Ended]

Please provide additional feedback regarding the IRS.gov Website [Open Ended]

Please provide additional comments you would like to share regarding your e-mail experience with us today? [Open Ended]

Thank you for volunteering to participate in our survey. The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is 1545-1432. The time estimated for participation is 3 minutes. If you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to the, Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224.

Please click FINISH below to submit your responses. Have a great day!

Attachment 3

Chat Questionnaire

IRS.gov CHAT CUSTOMER SATISFACTION SURVEY

Thank you for taking the time to complete this survey regarding your experience with the IRS.gov Website Help Desk Live Chat.

INSTRUCTIONS: Please select your responses from the lists provided by clicking on the appropriate answer with your mouse or typing your responses in the space provided. You can navigate through the survey using the forward and back buttons of your browser as well as the "Next" and "Back" buttons located at the bottom of each survey page. You may need to use the scroll bar, which will appear at the right side or bottom of your screen to view an entire question. Please answer all questions. The survey will not allow you to skip questions that require an answer.

Note: Please **do not** provide any personal information such as your name, Taxpayer Identification Number, Social Security Number, or address. We are not permitted to respond to tax or personally related inquiries.

Please click the "Next" button below to continue.

Which of the following best describes the reason for your chat session? *response required

1. e-File or Free File a Tax Return questions
2. EIN (Employer Identification Number) questions
3. Forms and Publications questions
4. Exempt Organization questions (Filing requirements, searching etc)
5. To check the status of your refund
6. Tax Preparer questions (Registration, training etc)
7. To obtain general tax information
8. Other (please specify)

Which of the following best describes you as an IRS.gov Website visitor? *response required

1. Individual
2. Business
3. Charities & Other Non-Profits
4. Government Entities
5. Tax Professionals
6. Retirement Planning Community
7. Tax Exempt Bond Community

Did you refer to any FAQs (frequently asked questions) or Tax Topics before contacting the IRS.gov Help Desk Live Chat Representative today?

1. Yes
2. No

If yes, how helpful did you find the FAQs or Tax Topics?

1. Extremely Helpful
2. Somewhat Helpful
3. Not Very Helpful
4. Not At All Helpful
5. No Opinion

Which FAQ or Tax Topics did you view before contacting the IRS.gov Help Desk

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How easy was it to find the IRS.gov Website Help Desk Chat service? *response required

1. Very Easy to Find
2. Somewhat Easy to Find
3. Not Very Easy to Find
4. Not At All Easy to Find
5. No Opinion

Please rate your level of agreement with the following statement: I found the process of establishing contact with the IRS.gov Website Help Desk Live Chat Representative quick and simple. *response required

1. Strongly Agree
2. Somewhat Agree
3. Somewhat Disagree
4. Strongly Disagree
5. No Opinion

On a scale of 1 to 7 with 1 being "Not At All Satisfied" and 7 being "Completely Satisfied", please rate your level of satisfaction with the following:

How satisfied were you with the time it took to connect with an IRS.gov Website Help Desk Live Chat Representative? *response required

How satisfied were you with the representative's level of knowledge about your specific question or issue? *response required

How satisfied were you with the representative's ability to take care of your situation? *response required

How satisfied were you with the length of time it took the representative to respond to your questions or comments? *response required

Overall, how satisfied were you with your experience using the IRS.gov Website Help Desk Live Chat? *response required

What could be improved about the service provided to you by the IRS.gov Website Help Desk Live Chat Representative today? *response required

1. Tone of the response
2. Quality of the response
3. Speed of the response
4. Completeness of the response / Answer all of your questions / Address all of your issues
5. Assurance during idle chat time that your issue or question was being looked into

6. No improvement needed
7. Other (Please Specify)

How satisfied were you with the tone of the responses you received from the IRS.gov Website Help Desk Live Chat Representative? *response required

1. 7 = Completely Satisfied
2. 6
3. 5
4. 4
5. 3
6. 2
7. 1 = Not At All Satisfied

How satisfied were you with the quality of the responses you received from the IRS.gov Help Desk Live Chat Representative? *response required

1. 7 = Completely Satisfied
2. 6
3. 5
4. 4
5. 3
6. 2
7. 1 = Not At All Satisfied

Was your IRS.gov Website issue resolved or your question answered today? *response required

1. Yes
2. No
3. Partially, but not completely
4. Don't Know / Unsure

If not, what additional actions will you take?

1. Try an additional IRS.gov Website Help Desk chat session
2. Contact the IRS.gov Website Help Desk via telephone
3. Contacting the IRS.gov Website Help Desk via e-mail
4. Do not intend to make any additional contacts to the IRS.gov Website Help Desk
5. Contact a Tax Preparer
6. Visit an IRS Walk-in Site
7. Contact an IRS tax line
8. Other (please specify)

Including today's session, how many total times have you contacted the IRS.gov Website Help Desk via chat regarding this specific Website issue or question? *response required

1. Once
2. Twice
3. Three Times
4. Four or More Times

How likely are you to utilize the IRS.gov Website Help Desk chat in the future for assistance with the IRS.gov Website? *response required

1. Definitely Will Use
2. Probably Will Use
3. Probably Will Not Use
4. Definitely Will Not Use
5. No Opinion

How likely are you to recommend the IRS.gov Website Help Desk chat to friends or family who need assistance with the IRS.gov Website? *response required

1. Definitely Will Recommend
2. Probably Will Recommend
3. Probably Will Not Recommend
4. Definitely Will Not Recommend
5. No Opinion

Where you referred to the IRS.gov Website Help Desk by another IRS help line? *response required

1. Yes
2. No

To help us improve the usability and content on the IRS.gov Website, please tell us where on the IRS.gov Website you looked for answers to your question prior to contacting the IRS.gov Website Help Desk. [Open Ended]

Please provide additional feedback regarding the IRS.gov Website [Open Ended]

Please provide additional comments you would like to share regarding your chat experience with us today? [Open Ended]

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Please click FINISH below to submit your responses. Have a great day!