

## Assistor Guide

### Telephone Satisfaction Survey

#### **SBSE AUR Telephone Employee Instructions**

The telephone system will randomly select calls for inclusion in the survey process at the beginning of the call. Assistors will be notified their call was selected by a display on their Aspect screen (you will not hear an audible beep). The teleset display will show -"**Offer Cust Sat Survey**". The display will show throughout the call. Complete the call, as you normally would, then follow the procedures below before ending the call:

1. **After you have summarized the call with the taxpayer**, and before ending the call, read the following script to the taxpayer, **EXACTLY as written**:

**This call has been randomly selected to participate in a brief automated 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 approximately eight minutes and requires a touch-tone phone. Would you like to participate in the survey?**

If any concerns surface from the taxpayer concerning the survey, please follow these guidelines:

<b>If caller:</b>	<b>Your Response:</b>
<b>Expresses concern about how they were selected</b>	Your call was randomly selected prior to your calling the IRS.
<b>Expresses concern for anonymity</b>	All information is anonymous. The responses on the questionnaire are not linked to any single individual.
<b>Asks how the information will be used</b>	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."
<b>Expresses concern for reprisal</b>	You will not be identified or penalized whether or not you decide to participate."
<b>Asks to be called back later</b>	Because you would be transferred into an automated survey, we would be unable to call you back at a later time. This is the only opportunity we have to gather your feedback.

<b>If the caller:</b>	<b>Your Response:</b>
<b>Does not have a touch tone phone</b>	I'm sorry; the survey requires a touch-tone phone. Thank you. Is there anything else I can help you with today? - respond to their questions (if any), thank him/her and terminate the call.
<b>Does <u>NOT AGREE</u> to take survey</b>	Is there anything else I can help you with today? respond to their questions (if any), thank him/her and terminate the call.
<b><u>AGREES</u> to take survey</b>	To make sure that your answers are anonymous and confidential, we are directing your call to an automated survey. When you are connected, you will be asked to press the star key when you are ready to take the survey.  Please hold for a few seconds while I transfer your call.

## MONITOR SECTION

Step	Prompt Text	Response Categories	Skips
A	Thank you for accessing the AUR Toll-free Survey. Please transfer the caller now.		Transfer

## RESPONDENT SECTION

Step	Prompt Text	Response Categories	Skips
1	<p>Thank you for participating in this voluntary survey. This survey is being conducted by ICF International, an independent, third-party organization, to assist the IRS in improving its services. Your identity will remain anonymous to the IRS. Your information will be combined with all others who take the survey and will be shared only in total with the IRS. It will take less than 10 minutes to complete. During this survey you will be asked to rate the service you received from the IRS on this call.</p> <p>Please press the star key to repeat the question. You may enter your response as soon as you know your answer.</p>		Go to step 2
2	<p>I am going to ask you several questions about your experiences during this call. Please answer the questions using the following scale:</p> <p>Press 5 for very satisfied            Press 4 for somewhat satisfied            Press 3 for neither satisfied nor dissatisfied            Press 2 for somewhat dissatisfied            Press 1 for very dissatisfied            If you are not sure, press 9</p> <p>Again, press the star key to repeat the question. You may enter your response as soon as you know your answer.</p>	<p><b>PROGRAMMING NOTE: Repeating the Question and Scale</b>            Please program in a delayed reminder. If no key is pressed within 4 seconds, the respondent would hear, "I'm sorry. I didn't hear your response. Please press the star key to hear the question again. Please press the pound key to hear the scale again."            If still no response after another 4 seconds, the respondent would hear, "I'm sorry. I still did not hear your response to this question. Let's move on to the next question."</p>	Go to step 3
3	Everything considered, rate your <b>overall satisfaction</b> with the service you received during this call.	[Satisfaction 1-5, 9 scale]	Go to step 4
4	This question relates to the IRS's automated answering system.	[Satisfaction 1-5, 9 scale]	Go to step 5

	Rate your satisfaction with the ease of understanding the automated answering system menu and instructions. Please press the star key to repeat the question. Please press the pound key to repeat the scale.	<b>NOTE:</b> In addition to Delayed Reminder options above, add the instructions to Q4 as the first reminder.	
5	These questions have to do with the IRS representative with whom you spoke. If you spoke to more than one representative, please consider the one with whom you spent the most time on the phone.		Go to step 6
6	Rate your satisfaction with the courtesy of the representative who handled your call.	[Satisfaction 1-5, 9 scale]	Go to step 7
7	Rate your satisfaction with the professionalism of the representative who handled your call.	[Satisfaction 1-5, 9 scale]	Go to step 8
8	Rate your satisfaction with the representative's willingness to help you with your issue.	[Satisfaction 1-5, 9 scale]	Go to step 9
9	Rate your satisfaction with the knowledge of the representative.	[Satisfaction 1-5, 9 scale]	Go to step 10
10	Rate your satisfaction with how clearly the IRS representative explained your issue.	[Satisfaction 1-5, 9 scale]	Go to step 11
11	Rate your satisfaction with how well the IRS representative listened to your concerns.	[Satisfaction 1-5, 9 scale]	Go to step 12
12	Rate your satisfaction with how clearly the IRS representative explained the next steps in resolving your discrepancy.	[Satisfaction 1-5, 9 scale]	Go to step 13
13	Rate your satisfaction with the length of time it took to complete your call from when you first reached a representative.	[Satisfaction 1-5, 9 scale]	If 1 or 2, go to step 14 If 3, 4, 5, go to step 16
14	Did you feel call the time you spent on the phone with the representative was too long, too short or about right?	For Too long, press 1 For Too short, press 2 For about right, press 3 If You Are Not Sure, press 4	If 1 or 2, go to step 15 If 3 or 4, go to step 16
15	Please tell us why you feel that way. Begin speaking at the tone. Press any key when you are finished.	[WAV Capture]	Go to step 16
16	What was the reason you called <i>today</i> ? You may enter your response as soon as you know your answer.	If to say you agree with the notice or letter but cannot pay, press 1 If to request an explanation of the notice or letter, press 2 If to request an extension to reply , press 3 If to request a copy of the notice or letter, press 4 If to check if the IRS has received the information you mailed or faxed in, press 5	If 2 then go to step 17, else go to step 18.

		<p>If you called to receive a status update of your case, press 6          If you called for any other reason, press 7          To hear these choices again, press the pound key</p>	
17	Was the last notice you received from the IRS sent to you by regular or certified mail?	<p>If regular mail, press 1          If certified mail, press 2          If you're not sure, press 3</p>	Go step 18
18	What could the IRS do to make the letter or notice you called about clearer? Begin speaking at the tone. Press any key when you are finished.	[WAV Capture]	Go to step 19
19	Including today, how many times have you called and discussed the particular issue raised in your notice or letter with an IRS representative?	<p>Press 1 through 4 for the number of times you have called          Press 5 for 5 or more times</p>	Go to step 20
20	How many minutes did you spend on this call today including any time on hold, but not including the time spent answering this survey?	<p>If less than 10 minutes, press 1          10 to 20 minutes, press 2          21 to 30 minutes, press 3          31 minutes or longer, press 4          To hear these choices again, press the pound key.</p>	Go to step 21
21	Did the IRS representative answer all your questions today?	<p>For Yes, press 1          For No, press 2          If You Are Not Sure, press 3</p>	If 2 or 3 go to step 22, if 1 then go to step 23
22	What information did you need that the IRS representative did not provide? Begin speaking at the tone. Press any key when you are finished.	[WAV Capture].	Go to step 23
23	Will the information you received today eliminate the need for further calls on this issue?	<p>For Yes, press 1          For No, press 2          If You Are Not Sure, press 3</p>	Go to step 24
24	<p>Overall, how well did the IRS meet your expectations during your call today?          For Much better than expected, press 5          For Better than expected, press 4          For As expected, press 3          For Worse than expected, press 2          For Much worse than expected, press 1</p>		If 1 or 2 then go to step 25; otherwise go to step 26.

25	Please share how the IRS can improve so that they would have better met your expectations during your call today. Begin speaking at the tone. Press any key when you are finished.	[WAV Capture]	Go to Step 26
26	The IRS continually looks for ways to improve its service to taxpayers who contact them. We would like to give you an opportunity to provide comments or suggestions for improvements. We welcome your feedback. You can begin speaking at the tone. Press any key when you are finished.	[WAV Capture]	Go to step 27
27	The IRS periodically asks ICF to do additional research on tax or service related issues. We often need to find respondents for this research. Would you be willing to participate in future research? If so, please provide us with your phone number and email address if you have one. This information will be anonymous to the IRS and used only for the purpose of survey research. Research participants may receive a small monetary incentive to participate depending on the research project.	If you would like to participate, press 1. If you do not want to participate, press 2.	If 1, go to step 28 If 2, go to step 32
28	Please enter your 10-digit telephone number, including area code.	[Enter 10 digits]	Go to step 29
29	You entered: (XXX) XXX-XXXX	If this is correct, press 1. To re-enter, press 2.	Go to step 30
30	Please state and spell your e-mail address. Press any key when you are finished.	[WAV Capture]	Go to step 31
31	Please state and spell your first and last name. Press any key when you are finished.	[WAV Capture]	Go to step 32
32	That completes the survey; however, we are required by law to report		Go to step 33

	to 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 used to complete this survey or ways to improve the survey, you may write to the IRS.		
33	Would you like the address to mail your comments?	If Yes, press 1 If No, press 2	If 1, go to step 34 If 2, go to step 35
34	Mail your comments to: Internal Revenue Service Tax Products Coordinating Committee 1111 Constitution Ave, NW, Room 6510-S Washington, DC 20224	To repeat this address, press 1. Otherwise, press 2.	Go to step 35
35	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, we encourage you to contact the Taxpayer Advocate Service toll-free telephone number.	If you would like the telephone number of the Taxpayer Advocate, press 1. Otherwise, press 2.	If 1, go to step 36 If 2, go to step 37
36	The Toll-Free Taxpayer Advocate phone number is 1-877-777-4778.	To repeat this telephone number, press 1. Otherwise, press 2.	Go to step 37
37	Thank you for participating in this survey. Your information will help improve the services provided by the IRS. On behalf of the IRS and ICF International, thank you. Goodbye.		