

**IRS Wage and Investment  
The Collection Operation  
Customer Satisfaction Phone Survey  
1/24/11**

Sample elements:

- AREA CODE AND TELEPHONE NUMBER:
- DATE AND TIME OF INTERVIEW:
- SITE CODES:

Introduction:

Hello, this is \_\_\_\_\_, calling from Pacific Market Research on behalf of the Internal Revenue Service. We are contacting taxpayers who have recently received mail from the IRS about collecting unpaid taxes or an unfiled return. The IRS is interested in getting your feedback about how well you were served so that they can improve their customer service. The average time of survey completion is expected to be less than 10 minutes. Feedback received from taxpayers in the past resulted in changes such as telephone contact in lieu of a mailed paper survey and notification to taxpayers of actions taken to resolve their issue

- 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)
- S2. The letter you received was from the Collection Operation of the IRS. Can you verify that you are the person who received this mail from the IRS?
- 1 Yes - (Skip to S3)
  - 2 No - (Ask for appropriate respondent)
  - 3 (DK) (Thank and terminate)
  - 4 (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 the COLLECTION OPERATION.

NAME:  
\_\_\_\_\_

RELATIONSHIP TO TAXPAYER:  
\_\_\_\_\_

PHONE NUMBER:

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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, on behalf of the Internal Revenue Service. We are contacting taxpayers who have recently received mail from the IRS about collecting unpaid taxes or an unfiled return. The IRS is interested in getting your 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 with the IRS. Is that correct?

- 1 Yes - (Skip to S3)
- 2 No - (Ask for appropriate respondent)
- 3 (DK) (Thank and terminate)
- 4 (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?

- 1 Yes (Proceed to survey)
- 2 No (Soft refusal) (Set time to call back)
- 3 (DK) (Set time to call back)
- 4 (Refused) (Thank and terminate)

I'm going to read a list of items about your opinion regarding how the IRS handled your correspondence regarding unpaid taxes, proposed additional taxes, or an unfiled return. 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," 2 means "Somewhat Dissatisfied," 3 means "Neither Satisfied nor Dissatisfied," 4 means "Somewhat Satisfied," and 5 means "Very Satisfied." If a question does not apply to you, please state so. How satisfied are you with the... (INTERVIEWER READ EACH ITEM)

Q1a. Ease of understanding the initial notice/letter?

- 5 Very satisfied

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

Q1b. Length of time you were given to respond to the Collection Operation?

Q1c. Length of time it took to resolve the issue(s) you wrote to the Collection Operation about?

Q1d. The manner in which the Collection Operation kept you informed regarding what was happening with your case?

**(Ask Q1d\_ver if code 1 or 2 in Q1d. Otherwise, skip to Q1f.)**

Q1d.\_ver. In what way are you not satisfied with the manner in which the Collection Operation kept you informed regarding what was happening with your case?

\_\_\_\_\_ (Open ended)

Q1e. Correspondence from the Collection Operation addressing all of your issues.

Q1f. Professional tone of the correspondence you received?

Q1g. Explanation of the actions the Collection Operation took to resolve your issue?

Q1h. Fairness of treatment by the Collection Operation?

Q1i. If you owed additional taxes and requested a payment plan, how satisfied were you with the ease of setting one up?

Q2. Regardless of whether you agree or disagree with the final outcome, please rate your overall satisfaction with the way your issue was handled by the Collection Operation. (If necessary, repeat scale)

- 5 Very satisfied
- 4 Somewhat satisfied
- 3 Neither satisfied nor dissatisfied
- 2 Somewhat dissatisfied
- 1 Very dissatisfied
- 0 Not applicable

**(Ask Q2\_ver if code "1" or "2" in Q2. Otherwise, skip to Q3.)**

Q2.\_\_ver. Please tell us what could have been done differently to improve the way your issue was handled:

\_\_\_\_\_ (Open ended)

Q3. Did you call the phone number listed on the letter from the Collection Operation?

- Yes
- No

***(Ask Q3a-Q3c if "Yes" in Q3. Otherwise, skip to Q4.)***

Using the same scale, with 1 being very dissatisfied and 5 being very satisfied, how satisfied are you with the: (INTERVIEWER, READ EACH ITEM)

Q3a. Length of time it took you to get through to the Collection Operation employee?

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

Q3b. Courtesy of the Collection Operation employee?

Q3c. Knowledge of the Collection Operation employee?

Q4. Did you ask for information from the Collection Operation, such as: income earned, forms, where to file, payment plans, payments received etc.

- Yes
- No

***(Ask Q4a and Q4b if "Yes" in Q4. Otherwise, skip to Q5a.)***

Q4a. Did you request this information by: [Multiple Response]?

- Telephone
- Mail
- Email
- In Person
- IRS Web site

Q4b. When replying to your request for information, did the IRS respond within 45 days?

- Yes
- No
- Did not receive a reply

Q5a\_1. The IRS is considering different ways to communicate with taxpayers besides via mail correspondence. How would you prefer to receive information about your tax account?

*[if necessary, READ What is your first choice?]*

*[Only prompt possible response choices if necessary]*

- Telephone

- Mail
- Email
- IRS Web site
- Cell phone text messaging
- Other (specify)\_\_\_\_\_

Q5a\_2. And what is your second choice method for receiving information about your tax account?

*[Only prompt possible response choices if necessary]*

- Telephone
- Mail
- Email
- IRS Web site
- Cell phone text messaging
- Other (specify)\_\_\_\_\_

Q5b. [If telephone in Q5a\_1 or Q5a\_2], How receptive would you be to receiving this information from the IRS via a recorded telephone message? Would you be very receptive, somewhat receptive, not very receptive, or not receptive at all?

- Very receptive
- Somewhat receptive
- Not very receptive
- Not at all receptive

Q5c\_ver. *[If not very or not at all receptive]* What concerns you about receiving a recorded message from the IRS? \_\_\_\_\_ (Open ended)

Q5d. [If telephone in Q5a\_1 or Q5a\_2], How receptive would you be to receiving this information via a telephone call from an IRS employee ready to assist you with resolving your tax matter?

- Very receptive
- Somewhat receptive
- Not very receptive
- Not at all receptive

(Ask of all)

Q6a. Was your issue with the IRS completely resolved?

- Yes
- No
- Not sure

Q6b. Did you agree with the outcome of your case? (Ask only of those who said yes in Q6a)

- Yes
- No
- Not Sure

Q7. Are you? (INTERVIEWER, READ LIST AND SELECT ONE)

- The taxpayer
- A tax professional who represented the taxpayer
- Someone else who represented the taxpayer

Q8. Do you have any final suggestions or comments you would like to make to the Collection Operation?

\_\_\_\_\_ (Open ended)

Q9. 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 Closing)

Q9a. 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 \_\_\_\_\_ [INTERVIEWERS: Please read phone number back to taxpayer]

Best Time to Call \_\_\_\_\_ (CATI: Allow time range)

Email \_\_\_\_\_

That completes the survey. We are required by law to provide you with 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?

(INTERVIEWER, IF YES) The address is: Internal Revenue Service, Tax Products Coordinating Committee, 1111 Constitution Avenue, NW, Washington, DC 20224

(INTERVIEWER, VALIDATE PHONE NUMBER AND THANK RESPONDENT BY SAYING)

Again, this is \_\_\_\_\_, with Pacific Market Research on behalf of the IRS COLLECTION OPERATION function. Thank you for your time.

