

## Welcome and Thank You Text

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The text you see here will appear at the top and bottom of your survey. Default text is included and you may modify this text as needed.

## Model Questions

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These questions will appear FIRST on the survey. Satisfaction questions are standardized to allow for benchmarking and calculation of an overall satisfaction score.

## Custom Questions

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When reviewing the custom questions tab, keep in mind these questions are used for segmentation analysis of the model data. It is suggested that you add, delete or change custom questions over time, as your needs or business objectives change.

### Focus Area #1: Achieving Actionable Data

- Know what changes are being made based on the intelligence
- Change Custom Questions so that stakeholders see a clear “must do”

### Focus Area #2: Aligning Data to Business Strategies

- Update your Custom Questions as business cycles change
- Integrate Executive Level questions to evaluate initiatives

### Focus Area #3: Strategic and Tactical Value

- Influence Board Room Decisions
- Change Operational Approaches
- Mature Your Research

### Why

- Analysis
- Top-Pri
- Open-e
- Shift w
- Inform
- Evalua

### **Update Your Custom Questions?**

Uncovered new questions to ask  
Key areas influence resource use  
Steps for quantifiable recommendations


Seasonal Needs

Re-launch or Re-design

Marketing Initiatives



The text you see here will appear at the top and bottom of your survey, examples below.  
Default text is included and you may modify this text as needed.

Welcome and Thank You Text
<p><b>Welcome Text</b></p> <p>Thank you for using IRS Secure Messaging. You've been chosen to take part in a brief survey to let us know what we're doing well and where we can improve.</p> <p>Please take a few minutes to share your opinions, which are essential in helping us provide the best experience possible.</p> <p>The authority requesting the information is 5 USC 301. The primary purpose of asking for the information is to determine steps IRS can take to improve our service to you. The information may be disclosed as authorized by the routine uses published for the Privacy Act System of Records. Providing the information is voluntary. Not answering some or all of the questions will not affect you.</p>
<p><b>Thank You Text</b></p> <p>Thank you for taking our survey - and for helping us serve you better.</p> <p>Please note you will not receive a response from us based on your survey comments. If you would like us to contact you about your feedback, please visit the Contact Us section of our website.</p>
<p><b>Example Desktop</b></p> <div style="border: 1px solid black; padding: 10px;"><div style="text-align: right;"></div><p style="text-align: center;"><b>Customer Satisfaction Survey</b></p><p>Thank you for visiting our site. You've been randomly chosen to take part in a brief survey to let us know what we're doing well and where we can improve.</p><p>Please take a few minutes to share your opinions, which are essential in helping us provide the best online experience possible.</p><p><i>Required questions are denoted by an *</i></p><hr style="border-top: 1px dashed black;"/><p>Thank you for taking our survey - and for helping us serve you better.</p><p>Please note you will not receive a response from us based on your survey comments. If you would like us to contact you about your feedback, please visit the Contact Us section of our web site.</p><p style="text-align: center;"><input type="button" value="Cancel"/> <input type="button" value="Submit"/></p></div>

Model Name IRS TDC Secure Messaging  
 Model ID  
 Partitioned No  
 Date 10/30/2017  
 Model Version NA

~~Red & Strike-Through~~: Delete  
Underlined & Italicized: Re-order  
 Pink: Addition  
 Blue: Reword



Label	Element Questions	Label	Satisfaction Questions	Label	Future Behaviors
			<b>Satisfaction</b>		<b>Likelihood To Use Again</b> (1=Very Unlikely, 10=Very Likely)
		<b>Satisfaction - Overall</b>	What is your <b>overall satisfaction</b> with Secure Messaging? <i>(1=Very Dissatisfied, 10=Very Satisfied)</i>	<b>Likelihood To Use Again</b>	If given the opportunity, how likely are you to use <b>Secure Messaging</b> again to communicate with the IRS?
		<b>Satisfaction - Expectations</b>	How well did Secure Messaging <b>meet your expectations</b> ? <i>(1=Falls Short, 10=Exceeds)</i>		
		<b>Satisfaction - Ideal</b>	How does Secure Messaging <b>compare to an ideal communication web application</b> ? <i>(1=Not Very Close, 10=Very Close)</i>		

Model Name IRS TDC Secure Messaging  
 Model ID 0  
 Partitioned No  
 Date 11/9/2017

~~Red & Strike-Through:~~ Delete  
Underlined & Italicized: Re-order  
 Pink: Addition  
 Blue: Rework



QID	QUESTION META TAG	Skip From	Question Text	Answer Choices	Skip To	Required Y/N	Type	Special Instructions	CQ Label
			Are you...?	The Taxpayer A Tax Professional who represented the taxpayer		Y	Radio button, one-up vertical	Skip Logic Group*	Role
			Have you previously been involved in a Correspondence Audit (audit by mail)?	Yes No	B1	Y	Radio button, one-up vertical	Skip Logic Group*	Previous Audit by Mail
		B1	How did the mail audit process compare to the process using IRS Secure Messaging?	5 – Secure Messaging much better than mail 4 – Secure Messaging better than mail 3 – Secure Messaging same as mail 2 – Mail better than Secure Messaging 1 – Mail much better than Secure Messaging		Y	Drop down, select one	Skip Logic Group*	Mail vs Secure Msg
			Rate your satisfaction with the overall way the IRS handled your audit.	5 – Very Satisfied 4 – Satisfied 3 – Neither satisfied nor dissatisfied 2 – Dissatisfied 1 – Very Dissatisfied		Y	Drop down, select one		Rate Overall Audit
			Rate your satisfaction with how well the IRS kept you informed of the status of your case.	5 – Very Satisfied 4 – Satisfied 3 – Neither satisfied nor dissatisfied 2 – Dissatisfied 1 – Very Dissatisfied		Y	Drop down, select one		Rate Status
			Rate your satisfaction with the length of the audit process from start to finish.	5 – Very Satisfied 4 – Satisfied 3 – Neither satisfied nor dissatisfied 2 – Dissatisfied 1 – Very Dissatisfied		Y	Drop down, select one		Rate Length
			Which statement best describes your level of agreement with the outcome of your case?	I agreed with all of the tax changes made by IRS I agreed with some of the tax changes made by IRS, but not all of the changes I disagreed with all of the tax changes made by the IRS The IRS did not make any changes to my taxes Not sure		Y	Drop down, select one		Agree With Outcome
			Which factor(s) influenced your initial decision to use Secure Messaging for your IRS audit? (Select all that apply)	Ability to upload documents Ability to communicate electronically Ability to communicate on my schedule Ability to resolve the audit quickly Other		Y	Checkbox, one-up vertical		Influenced Decision To Use
			Rate your satisfaction with the ease of signing up to use IRS Secure Messaging.	5 – Very Satisfied 4 – Satisfied 3 – Neither satisfied nor dissatisfied 2 – Dissatisfied 1 – Very Dissatisfied		Y	Drop down, select one		Rate Signup
			Rate your satisfaction with the ease of using IRS Secure Messaging to communicate with the IRS employee handling your audit.	5 – Very Satisfied 4 – Satisfied 3 – Neither satisfied nor dissatisfied 2 – Dissatisfied 1 – Very Dissatisfied		Y	Drop down, select one		Rate Ease of Communication
			After enrolling in IRS Secure Messaging, what other methods did you use to communicate with the IRS? (Select all that apply)	Used only Secure Messaging Phone call Fax Mail	A A A	Y	Checkbox, one-up vertical	Mutually Exclusive Skip Logic Group*	Methods of Communication
		A	What was the reason for using another method to communicate with the IRS instead of Secure Messaging? (Select all that apply)	Documents were too large/voluminous to send using Secure Messaging Instructions were not clear I did not receive a timely response/acknowledgement I had problems accessing Secure Messaging Preferred to use mail or fax Other (please specify)		Y	Checkbox, one-up vertical	Skip Logic Group*	Reason Other Comms
		A1	Why else did you use another communication method?		A1	N	Text area, no char limit	Skip Logic Group*	Reason Other Comms OE

		Rate your satisfaction with the ease of submitting documentation to the IRS using the Secure Messaging system. (e.g., receipts, copies of bills, etc.)	5 – Very Satisfied		Y	Drop down, select one	Rate Submitting Docs
			4 – Satisfied				
			3 – Neither satisfied nor dissatisfied				
			2 – Dissatisfied				
			1 – Very Dissatisfied				
		Do you have any suggestions for improving the IRS Secure Messaging process? <i>To help ensure your privacy, please do not include any personal information in your response (e.g. Name, SSN, address, phone number, etc).</i>			N	Text area, no char limit	Suggestions OE