

Script for the Follow-Up Appointment Line Survey Recruitment:

Hello, my name is _____, and I am calling from [contracted company], a research company in [location]. We are calling on behalf of the Internal Revenue Service to ask for your participation in research to understand taxpayer opinions regarding the appointment line and subsequent service.

You recently participated in a survey based on your call to the IRS Appointment line, during that call you indicated being willing to participate in additional research.

Your participation means you will take a survey for about 20 minutes. We are offering \$25 to thank you for your time. This feedback will maintain privacy to the extent allowed by law, which means what you say will not be repeated outside of the session. No advanced preparation is needed for this session. Are you interested in participating?

IF 'NO,' thank you and have a great evening/day.

IF 'YES,' Great! As I mentioned previously, we are surveying people over the phone or through a web link we can email to you, based on how you prefer to participate. You will be mailed \$25 upon completion of the survey. Would you still like to participate?

IF 'YES, Thank you for your participation. Now, I need to set up a time for you to take the survey if you would like to participate over the phone. If you would like to take the survey via a web link that we will email you, I will need to confirm your email address.

[If respondent seems uncomfortable, explain, "This information will be used only to contact you about the survey."]

Respondent's name: _____

Email Address (if preferred contact): _____

Telephone Number: _____

Alternate Number: _____

DATE and TIME for phone survey: _____

Script for Follow-Up Survey via Phone

Hello, my name is _____, and I am calling from [contracted company]. We are scheduled to conduct a survey; is now a good time?

Thank you for participating in this voluntary survey; it should take about 20 minutes. Your input will assist the IRS to improve its service for callers like you. All answers will be kept private to the extent allowed by law. There are no penalties for not answering some or all of the survey questions.

You recently called the IRS to make an appointment at a walk-in office and completed a phone survey about the call. At that time, you indicated a willingness to participate in additional research. Today we are conducting follow-up surveys to identify where we may improve IRS service.

1. During your call on [insert date], what issue did you contact the IRS to obtain service for?
 - Transcript request
 - Make a payment
 - Account related issue
 - Obtain a tax form or publication
 - Explain a notice or letter from the IRS
 - A general tax law question
 - Obtain a tax identification number
 - Identity theft related issue
 - Sailing permit
 - Other
 - o Please describe

2. Since that call with the IRS have you had any additional contact with the IRS regarding that issue?
 - Yes
 - o Toll-Free (non-appointment line)
 - Yes
 - Number of times
 - No
 - o IRS.gov
 - Yes
 - Number of times
 - No
 - o Walk-in IRS office
 - Yes
 - Number of times

- No
 - o Mailed the IRS
 - Yes
 - Number of times
 - No
 - o Mail from the IRS
 - Yes
 - Number of times
 - No
 - o Sent fax to the IRS
 - Yes
 - Number of times
 - No
 - o Emailed the IRS
 - Yes
 - Number of times
 - No
 - No
3. Since that call, have you reached out for assistance outside of the IRS?
 - Yes
 - o Please describe
 - No
4. If you had an appointment, would you be interested in the IRS sending you an appointment reminder..?
 - By text
 - o Yes
 - o No
 - By phone
 - o Yes
 - o No
 - If yes to text and email, what is your preference?
5. During your call on [insert date] with the IRS did you schedule an appointment for service at an IRS walk-in office?
 - Yes (go to 6)
 - No (go to 23)
6. Did you go to your scheduled appointment?

- Yes (if yes, go to 7)
- No (if no, then go to 22)

7. Were you told to arrive early for your appointment?

- Yes (if yes, go to 7a)
- No (if no, go to 8)

7a. How early were you told to arrive before for your appointment?

- Less than 15 minutes
- 15 to 30 minutes
- 31 minutes or more

8. Rate your satisfaction with the time spent waiting for your appointment to begin after you arrived at the walk-in office.

These next few questions have to do with the IRS representative who helped you during your appointment. If you were helped by more than one IRS representative during your appointment, please rate the one you spent the most time with. You may enter your response as soon as you know your answer.

9. Rate your satisfaction overall satisfaction with the service.

10. Rate your satisfaction with the promptness of the service.

11. Rate your satisfaction with the professionalism of the staff.

12. Rate your satisfaction with the knowledge of the staff.

13. Rate your satisfaction with the privacy of the contact.

14. Rate your satisfaction with ease of finding the office.

15. Rate your satisfaction with the appointment process.

16. Rate your satisfaction with the time between requesting an appointment and the actual appointment.

17. Did the IRS representative answer all of your questions during the appointment?

- Yes
- No

18. Did the information you received during your appointment eliminate the need for further contact with the IRS for your tax issue?

- Yes
- No (if no, go to 18a, 18b, 18c)

18a. Please describe what information or assistance you needed that was not provided.

18b. Did the representative schedule another appointment (specific day or time) for you?

- Yes

- No

18c. Did you call the appointment line to schedule another appointment?

- Yes
- No

19. During the appointment, did you bring all the materials you needed to resolve the issue?

- Yes (if yes, go to 20)
- No (if no, got to 19a,19b,19c)

19a. Please describe what information or materials you needed for the appointment but did not have with you.

19b. Please provide any suggestions on how the IRS could have better prepared you regarding the materials needed for your appointment.

19c. Did you return to that IRS office to bring the materials or information you needed for service?

- Yes
 - o 1. Did the representative make an appointment (specific day or time) for you?
 - Yes (go to 19c.4)
 - No (go to 19c.2)
 - o 2. Did the representative tell you to bring the materials back without an appointment (no specific day or time)?
 - Yes (go to 19c.4)
 - No (go to 19c.3)
 - o 3. Did you call the appointment line to schedule another appointment?
 - Yes (go to 19c.4)
 - No (go to 19c.4)
 - o 4. Did you go back to the IRS office once you obtained the needed materials or information?
 - Yes
 - How many days later? (go to 20)
 - o Same day
 - o Same week
 - o Week later
 - o Two or more weeks later
 - No
- No

- o 19c.5 Please explain why you did not return to the office with the needed materials or information for service. (go to 20)

20. After the appointment, did you take additional steps to resolve your issue?

- Yes (if yes go to 20a)
- No (if no, go to 21)

20a. Please explain what efforts or steps you took to resolve your issue.

21. Please provide any suggestions on how the IRS could have better prepared you for your appointment. (go to 27)

No Show Questions: Scheduled an appointment, but didn't attend

22. You indicated that you did not attend the scheduled appointment, please select the reason you did not attend (select all that apply)

- Tax issue was resolved prior to appointment (go to 22a)
 - o 21a. How did you finally obtain resolution (select one)
 - IRS Walk-in office
 - IRS Toll Free Phone
 - Mailed IRS
 - Website (IRS.gov)
 - Tax Professional
 - Family, friend, coworker
 - Other
 - Please explain
- You couldn't make the appointment, something came up (go to 22b)
 - o 22b. Did you call to cancel the appointment?
 - Yes
 - No
 - o 22c. Did you call to reschedule an appointment?
 - Yes
 - No
 - 22c.1 Please describe, why not?
 - 22c.2 Will you call to reschedule in the future?
 - o Yes
 - o No
- You forgot about the appointment
 - o 22d.
 - o 22e. Did you call to reschedule an appointment?
 - Yes

- No
 - 22e.1 Please describe why not.
 - 22e. 2 Will you call to reschedule in the future?
 - o Yes
 - o No
- The IRS office cancelled your appointment (go to 22f)
 - o Yes (go to 27)
 - o No
 - 22f.1 Did they offer to reschedule?
 - Yes
 - No
 - 22f.2 Were you able to successfully reschedule?
 - Yes
 - o Are you willing to participate in future research regarding how IRS can improve service?
 - Yes
 - Spell first and last name
 - Phone number
 - Email address
 - No
 - No (go to 22f.2a)
 - o 22f.2a. Will you call to reschedule in the future?
 - Yes
 - No
 - o 22f.2b. Please describe any future actions you plan to take regarding your issue.

No Scheduled Appointment

23. You did not schedule an appointment, were you provided the service you needed during the phone call?
- Yes
 - No (go to 23a)
 - o 23a. Did the representative over the phone provide instructions on how to resolve your issue?
 - Yes
 - No
 - Please describe

24. Did you contact a tax professional in order to obtain assistance for your tax issue, since the call to make an appointment?

- Yes
- No

25. Describe any additional efforts or steps you took regarding resolving your issue after the call.

26. Is your tax issue resolved?

- Yes
- No

o Please explain.

▪ 26a. Because your issue is not resolved, do you think you will need to contact the IRS for additional assistance in the future?

- Yes
- No

▪ 26b. Do you plan to schedule an appointment to obtain assistance for your tax issue?

- Yes
- No

Last question address improvement opportunities.

27. Please describe any suggestions for improving IRS service.

That completes the survey; however, we are required by law to report 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. Would you like the address?

If so, please write to: Internal Revenue Service, IRS **Special Services Section, 1111 Constitution Avenue, NW, SE:W:CAR:MP:T:M:S - Room 6129, Washington, DC 20224**

We would like to mail you \$25 to thank you for completing the survey. We will be sending you this money via mail. Could you please verify who the check should be made out to:

First Name _____

Last Name _____

Lastly, could you please provide an address for us to send the check:

Address: _____

Reminder Call for the Follow-Up Survey

Hello,

I am calling from [contracted company] to confirm your upcoming appointment for a phone survey on [insert date] at [insert time]. Does that time still work for you?

Before I go I would like to confirm your contact information:

Telephone Number: _____

Alternate Number: _____

Do you have any questions?

Thank you for participating in this research to better understand taxpayer opinions regarding the appointment line and service.

Reminder Email for the Follow-Up Survey

Hello,

I am contacting you from [contracted company] to confirm your upcoming appointment for an email survey. We will be emailing you a survey link on [insert date] at [insert time]. Does that time still work for you?

Please let me know if you would rather we contact you at a different email address. Also, feel free to contact me with any questions that you have.

Sincerely,

[insert contractor]

Thank you

Follow-Up Survey Link Provided via Email

Hello,

I am contacting you from [contracted company]. We are scheduled to administer an email survey.

Thank you for participating in this voluntary survey; it should take about 20 minutes. Your input will assist the IRS to improve its service for callers like you. All answers will be kept private to the extent allowed by law. There are no penalties for not answering some or all of the survey questions.

The link to the survey is www.contractorprovided.com.

If you have any issues accessing or completing the survey please contact us at [insert contractor information].

Thank you,

[insert contractor]

Follow-Up Survey via Web Link

Thank you for participating in this voluntary survey; it should take about 20 minutes. Your input will assist the IRS to improve its service for callers like you. All answers will be kept private to the extent allowed by law. There are no penalties for not answering some or all of the survey questions.

You recently called the IRS to make an appointment at a walk-in office and completed a phone survey about the call. At that time, you indicated a willingness to participate in additional research. Today we are conducting follow-up surveys to identify where we may improve IRS service. .

1. During your call on [insert date], what issue did you contact the IRS to obtain service for?
 - Transcript request
 - Make a payment
 - Account related issue
 - Obtain a tax form or publication
 - Explain a notice or letter from the IRS
 - A general tax law question
 - Obtain a tax identification number
 - Identity theft related issue
 - Sailing permit
 - Other
 - o Please describe
2. Since that call with the IRS have you had any additional contact with the IRS regarding that issue?
 - Yes

- o Toll-Free (non-appointment line)
 - Yes
 - Number of times
 - No
- o IRS.gov
 - Yes
 - Number of times
 - No
- o Walk-in IRS office
 - Yes
 - Number of times
 - No
- o Mailed the IRS
 - Yes
 - Number of times
 - No
- o Mail from the IRS
 - Yes
 - Number of times
 - No
- o Sent fax to the IRS
 - Yes
 - Number of times
 - No
- o Emailed the IRS
 - Yes
 - Number of times
 - No

- No

3. Since that call, have you reached out for assistance outside of the IRS?

- Yes
 - o Please describe
- No

4. If you had an appointment, would you be interested in the IRS sending you an appointment reminder..?

- By text
 - o Yes
 - o No

- By phone
 - o Yes
 - o No
 - If yes to text and email, what is your preference?
5. During your call on [insert date] with the IRS did you schedule an appointment for service at an IRS walk-in office?
- Yes (go to 6)
 - No (go to 23)
6. Did you go to your scheduled appointment?
- Yes (if yes, go to 7)
 - No (if no, then go to 22)
7. Were you told to arrive early for your appointment?
- Yes (if yes, go to 7a)
 - No (if no, go to 8)
- 7a. How early were you told to arrive before for your appointment?
- Less than 15 minutes
 - 15 to 30 minutes
 - 31 minutes or more
8. Rate your satisfaction with the time spent waiting for your appointment to begin after you arrived at the walk-in office.

These next few questions have to do with the IRS representative who helped you during your appointment. If you were helped by more than one IRS representative during your appointment, please rate the one you spent the most time with. You may enter your response as soon as you know your answer.

9. Rate your satisfaction overall satisfaction with the service.
10. Rate your satisfaction with the promptness of the service.
11. Rate your satisfaction with the professionalism of the staff.
12. Rate your satisfaction with the knowledge of the staff.
13. Rate your satisfaction with the privacy of the contact.
14. Rate your satisfaction with ease of finding the office.
15. Rate your satisfaction with the appointment process.
16. Rate your satisfaction with the time between requesting an appointment and the actual appointment.
17. Did the IRS representative answer all of your questions during the appointment?
- Yes

- No
18. Did the information you received during your appointment eliminate the need for further contact with the IRS for your tax issue?
- Yes
 - No (if no, go to 18a, 18b, 18c)
- 18a. Please describe what information or assistance you needed that was not provided.
- 18b. Did the representative schedule another appointment (specific day or time) for you?
- Yes
 - No
- 18c. Did you call the appointment line to schedule another appointment?
- Yes
 - No
19. During the appointment, did you bring all the materials you needed to resolve the issue?
- Yes (if yes, go to 20)
 - No (if no, go to 19a, 19b, 19c)
- 19a. Please describe what information or materials you needed for the appointment but did not have with you.
- 19b. Please provide any suggestions on how the IRS could have better prepared you regarding the materials needed for your appointment.
- 19c. Did you return to that IRS office to bring the materials or information you needed for service?
- Yes
 - o 1. Did the representative make an appointment (specific day or time) for you?
 - Yes (go to 19c.4)
 - No (go to 19c.2)
 - o 2. Did the representative tell you to bring the materials back without an appointment (no specific day or time)?
 - Yes (go to 19c.4)
 - No (go to 19c.3)
 - o 3. Did you call the appointment line to schedule another appointment?
 - Yes (go to 19c.4)
 - No (go to 19c.4)

- o 4. Did you go back to the IRS office once you obtained the needed materials or information?
 - Yes
 - How many days later? (go to 20)
 - o Same day
 - o Same week
 - o Week later
 - o Two or more weeks later
 - No
- No
 - o 19c.5 Please explain why you did not return to the office with the needed materials or information for service. (go to 20)

20. After the appointment, did you take additional steps to resolve your issue?

- Yes (if yes go to 20a)
- No (if no, go to 21)

20a. Please explain what efforts or steps you took to resolve your issue.

21. Please provide any suggestions on how the IRS could have better prepared you for your appointment. (go to 27)

No Show Questions: Scheduled an appointment, but didn't attend

22. You indicated that you did not attend the scheduled appointment, please select the reason you did not attend (select all that apply)

- Tax issue was resolved prior to appointment (go to 22a)
 - o 21a. How did you finally obtain resolution (select one)
 - IRS Walk-in office
 - IRS Toll Free Phone
 - Mailed IRS
 - Website (IRS.gov)
 - Tax Professional
 - Family, friend, coworker
 - Other
 - Please explain
- You couldn't make the appointment, something came up (go to 22b)
 - o 22b. Did you call to cancel the appointment?
 - Yes
 - No
 - o 22c. Did you call to reschedule an appointment?

- Yes
 - No
 - 22c.1 Please describe, why not?
 - 22c.2 Will you call to reschedule in the future?
 - o Yes
 - o No
- You forgot about the appointment
 - o 22d.
 - o 22e. Did you call to reschedule an appointment?
 - Yes
 - No
 - 22e.1 Please describe why not.
 - 22e. 2 Will you call to reschedule in the future?
 - o Yes
 - o No
- The IRS office cancelled your appointment (go to 22f)
 - o Yes (go to 27)
 - o No
 - 22f.1 Did they offer to reschedule?
 - Yes
 - No
 - 22f.2 Were you able to successfully reschedule?
 - Yes
 - o Are you willing to participate in future research regarding how IRS can improve service?
 - Yes
 - Spell first and last name
 - Phone number
 - Email address
 - No
 - No (go to 22f.2a)
 - o 22f.2a. Will you call to reschedule in the future?
 - Yes
 - No
 - o 22f.2b. Please describe any future actions you plan to take regarding your issue.

No Scheduled Appointment

23. You did not schedule an appointment, were you provided the service you needed during the phone call?

- Yes
- No (go to 23a)
 - o 23a. Did the representative over the phone provide instructions on how to resolve your issue?
 - Yes
 - No
 - Please describe

24. Did you contact a tax professional in order to obtain assistance for your tax issue, since the call to make an appointment?

- Yes
- No

25. Describe any additional efforts or steps you took regarding resolving your issue after the call.

26. Is your tax issue resolved?

- Yes
- No
 - o Please explain.
 - 26a. Because your issue is not resolved, do you think you will need to contact the IRS for additional assistance in the future?
 - Yes
 - No
 - 26b. Do you plan to schedule an appointment to obtain assistance for your tax issue?
 - Yes
 - No

Last question address improvement opportunities.

27. Please describe any suggestions for improving IRS service.

That is the completion of the survey. We would like to mail you \$25 to thank you for completing the survey. We will be sending you this money via mail. Could you please verify who the check should be made out to?

First Name _____

Last Name _____

Privacy Statement

Lastly, could you please provide an address for us to send the check?

Address: _____

Paperwork Reduction Act Notice

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. If you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to: IRS Special Services Section, 1111 Constitution Avenue, NW, SE:W:CAR:MP:T:M:S - Room 6129, Washington, DC 20224

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 entitled, Treas/IRS 00.001 Correspondence Files, including Stakeholder Partnership File, and Correspondence Control Files, as published in the Federal Register: December 10, 2001 (Volume 66, Number 237)] [Notices] pages 63785-6. Providing the information is voluntary. Not answering some or all of the questions will not affect you