

## Assistor Guide

1. 21.10.1.9.4.2  
(09/27/2011)  
(12/06/2011)

### Conducting the Telephone Customer Satisfaction Survey

#### 2. CSR/CR Responsibilities

- a. When the call the CSR/CR is assisting has been selected for the Customer Satisfaction Survey, the assistor will be notified their call was selected by a display on the Aspect screen, they will no longer hear a beep. The teleset display will show - **TF Offer Cust Sat Survey**. The display will show throughout the call, unless the TP is put on hold.

**NOTE:** If the CSR/CR is going to transfer the caller to another number or application, (the taxpayer would not have normally hung up) do not notify the caller or offer the survey.

- b. The CSR/CR will complete the call as usual.
- c. After the call is complete, the CSR/CR will read the following script **exactly as written**:

***"This call has been randomly selected to participate in a brief survey regarding the service you received today. The survey will take about ten minutes. You must also have a touch tone phone. Would you like to participate in the survey?"***

- d. If the caller declines to participate, the CSR/CR will thank him/her and terminate the call.
- e. If the caller asks any questions about the survey, the CSR/CR will read the following as written:

<b>If the taxpayer</b>	<b>Then respond</b>
Expresses concern about how they were selected	"Your call was randomly selected prior to your calling the IRS."
Expresses concern for anonymity	"All information is anonymous. The responses on the questionnaire are not linked to any single individual. "
Asks how the information will be used	"The IRS is trying to improve its service. A first step in this process is to gather reliable information from those who have had contact with the IRS."
Expresses concern for reprisal	"You will not be identified or penalized whether or not you decide to participate."
Asks to be called back later	"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 survey you."

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**For Automated Collection System (ACS):** If the caller agrees to take the survey, say:

*Thank you for agreeing to take this survey.*

*To make sure that your answers are anonymous as allowed by law, 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.*

CSR/CR will dial the survey by pressing "OUTSIDE LINE 1 or 2" on your ASPECT teletext and entering the appropriate number as identified below. Then press ENTER/TRANSFER and **hang up immediately. DO NOT WAIT FOR EXTENSION TO PICKUP OR FOR FURTHER INSTRUCTIONS. Do Not Place the Caller on Hold.**

1. **NOTE:** To use speed dials: OUTSIDE LINE 1 or 2...3-digit number + ENTER/TRANSFER **and hang up immediately. DO NOT WAIT FOR EXTENSION TO PICKUP OR FOR FURTHER INSTRUCTIONS.** For SB/SE ACS, use 133 and W&I ACS 123. **Do not place the caller on hold.**

ACS SBSE Sites	Toll-Free Number	Speed Dial Number
Brookhaven	800-619-3128	133
Denver	800-231-1081	133
Des Moines	800-231-1086	133
Detroit	800-238-1563	133
Nashville	800-249-8410	133
Oakland	800-258-9297	133
Philadelphia	800-260-4194	133

ACS W&I Sites	Toll-Free Number	Speed Dial Number
Atlanta	800-647-7168	123
Austin	800-238-1590	123
Buffalo	800-252-0734	123
Fresno	800-238-1576	123
Jacksonville	800-241-9680	123
Kansas City	800-241-9689	123
Puerto Rico	800-241-9683	123
Seattle	800-252-0841	123

1. If there are any problems with the 800 number or the automated survey system, the CSR/CR will just thank the caller and apologize for the inconvenience, terminate the call and alert the site's QR staff and they will contact Todd Hamlin from ICF Macro (W&I CAS) at [thamlin@icfi.com](mailto:thamlin@icfi.com) or Jennifer Schranz at [jschranz@pcgfirm.com](mailto:jschranz@pcgfirm.com) to investigate the problem.
2. While any individual CSR/CR may only be notified occasionally for a Customer Satisfaction Survey attempt, each CSR/CR must have a copy of the CSR/CR script readily available. The script should be visible in each CSR's/CR's work area.
3. CSRs/CRs must know the appropriate numbers and extensions to call when the caller

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agrees to the survey.

## ACS Small Business and Self-Employed

(For Respondent)

*Press the star key when you are ready to take the survey (to repeat in Spanish also)*

**A. To take the survey in English, press 1**

**To take the survey in Spanish, press 2**

### Quality of Service Section

*Caller hears: Thank you for participating in this voluntary survey. This survey allows taxpayers to provide anonymous and anonymous as allowed by law information to assist the IRS in improving its services. It will take less than 10 minutes to complete.*

*During this survey, please rate the following questions using the following scale:*

*If you were very satisfied, press 5*

*For somewhat satisfied, press 4*

*For neither satisfied nor dissatisfied, press 3*

*For somewhat dissatisfied, press 2*

*For very dissatisfied, press 1*

*If you are not sure, press 9*

*Press the star key to repeat the question.*

*You may press the pound key to go back to the previous questions and change your answer if necessary.*

**Question 1:** Everything considered, rate your **overall satisfaction** with the service you received during this call.

**Question 2:** Did this call relate to a notice, bill, or letter you received recently from the IRS?

If yes, press 1 (Go to Q3)

For no, press 2 (Skip to Q5)

If you are not sure, press 9

**Question 3:** Please rate your level of satisfaction with the clarity of the notice, bill, or letter.

**Question 4:** Please rate your level of satisfaction with the tone of the notice, bill, or letter.

If rating of 1 or 2, go to Q4a; otherwise skip to Q5.

**Question 4a:** What can IRS do to improve the clarity and/or tone of the notice, bill or letter you received? Begin speaking at the tone. Press any key when you are finished.

*Caller hears: The following questions have to do with the IRS's automated answering system. The response scale is the same. You may enter your response as soon as you know your answer.*

**Question 5:** This question relates to the IRS's automated answering system.

Rate your satisfaction with the ease of understanding the automated answering system menu and instructions.

*Again, please press the star key to repeat the question. Please press the pound key to repeat the scale.[not matrix]*

*Caller hears: The following 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.*

**Question 6:** Rate your satisfaction with the courtesy of the representative who handled your call.

**Question 7:** Rate your satisfaction with the professionalism of the representative who handled your call.

**Question 8:** Rate your satisfaction with the representative's willingness to help you with your issue.

**Question 9:** Rate your satisfaction with the knowledge of the representative.

**Question 10:** Rate your satisfaction with how clearly the IRS representative explained your issue.

**Question 11:** Rate your satisfaction with how well the IRS representative listened to your concerns.

**Question 12:** Rate your satisfaction with how clearly the IRS representative explained the next steps in resolving your issue.

**Question 13:** Did the representative explain the specific actions you need to take to resolve your issue? If yes, press 1; If no, press 2; If not applicable, press 3

**Question 14:** Did the representative explain what will happen if you do not take these actions? If yes, press 1; If no, press 2; If not applicable, press 3

**Question 15:** As part of your resolution, are you required to follow-up with an additional phone call or mail-in correspondence? If yes, press 1; If no, press 2; If not applicable, press 3.

**Question 16:** Rate your satisfaction with the amount of time you were given for follow up.

**Question 17:** Rate your satisfaction with the length of time it took to complete your call from when you first reached a representative.

**Question 18:** If you think the time you spent on the phone with the representative was too short, press 1. If you think it was too long, press 2.

*Caller hears: There are just a few more questions left. Please listen carefully to the new response choices.*

**Question 19:** Did the IRS representative answer all your questions today? Yes, No, Don't know

**Question 20:** Not counting this survey, how many people at the IRS did you speak to during this call? Press 1 through 4 for the number of people you spoke with. If you spoke with 5 or more people, press 5; if you are not sure, press 9

**Question 21:** How many minutes did you spend on this call including any time on hold, but not including the time spent answering this survey? If less than 10 minutes, press 1; 10 to 20 minutes, press 2; 21 to 30 minutes, press 3; 31 minutes or longer, press

**Question 22:**

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

Demographic Question:

**Question 23:** If you called today as an individual taxpayer, press 1; a business taxpayer, press 2; an exempt organization, press 3; or a tax practitioner, press 4.

**Question 24:** Do you have any comments or suggestions for the IRS regarding your experience today? Begin speaking at the tone. Press any key when you are finished.

**End Section**

**Question 25** We often conduct research on behalf of the IRS and need participants like you. Would you be willing to participate in future research? If so, please provide us with your name and phone number. This information will be anonymous as allowed by law and used only for the purpose of market research. The IRS will not

be given your name or phone number. You may receive a small monetary incentive to participate in future research projects.

If you would like to participate, press 1 (*Go to Q25a*)  
If you do not want to participate, press 2 (*Skip to Q26*)

**Question 25a** Please type in your phone number:

**Question 25b** Please state and spell your first and last name:

*Caller hears* 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.

**Question 26** Would you like the address to mail your comments?

If yes, press 1. If no, press 2

*If yes, the caller hears:*

Mail your comments to:  
Products Coordinating Committee  
Room #1R-6406  
1111 Constitution Avenue NW  
Washington, DC 20224

**Question 26a** To repeat this address, press 1. Otherwise, press 2

**Question 27** If you have tried unsuccessfully to resolve a problem with the IRS or if you have a complaint, you may contact the Taxpayer Advocate's office by calling a toll-free telephone number.

If you would like the phone number of the Taxpayer Advocate, press 1  
Otherwise, press 2

*If 1, the caller hears:*

The toll-free Taxpayer Advocate phone number is 1-877-777-4778.

**Question 27a** To repeat this telephone number, press 1. Otherwise, press 2

Thank you for participating in this survey. Your information will help improve the services provided by the IRS. Thank you. Goodbye.

Survey End