

## Attachment – survey procedures and questions

### The Procedures

The telephone system will randomly select calls for inclusion in the survey process at the beginning of the call. Customer Service Representatives (CSRs) will be notified their call was selected by a display on their Aspect screen. The teleset display will show – “Offer Cust Sat Survey”. The display will show throughout the call except when the call is placed on hold.

**Note:** If the CSR 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

The employee will complete the call as they would normally do and complete the following procedures:

1. read the following script to the caller, **EXACTLY** as written:

**This call has been randomly selected to participate in a brief 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 less than 5 minutes. Would you like to participate in the survey?**

- If the caller does **NOT AGREE**, say:

**Is there anything else I can help you with today?**

- respond to their questions (if any), thank him/her and terminate the call.

- If the caller **AGREES**, say:

**Thank you for agreeing to take this survey. May I ask if you have a touch tone phone?**

**If NO**, say, I'm sorry, the survey requires a touch-tone phone. Thank you.

**If YES**, say: **To make sure that your answers are as 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...**

Using <b>Aspect Phone/computer</b> keys...
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- To Dial into CSS phone survey vendor
1. Press **OUTSIDE LINE #2**
  2. Dial site appropriate number
- NOTE:** To use speed dials: OUTSIDE LINE 2, 2- or 3-digit number + ENTER.
- For **Toll Free**, use 55 (555 for Cleveland, Fresno, and St. Louis)
  - For **PPS**, use 66
  - For **TE/GE** use 88
3. Press **Enter**.
  4. **When you hear**, "Thank you. Please transfer call now"
  5. **Press "Transfer"**
- ...then hang up.**

*Note: Once connected, the survey system will instruct the caller, "Press the star key when you are ready to take the survey." Remember, this is for the caller to press the star, not for IRS staff*

If the caller asks any questions about the survey, the CSR 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 as anonymous as allowed by law. 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 to the American public. 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."

Question #	Prompt Text	Response Categories
	Thank you for participating in this voluntary survey. This survey allows tax practitioners to provide anonymous and confidential information to assist the IRS in improving its services. It should take less than 5 minutes to complete and you can press the star key at any time to repeat any question. You may press the # key to go back to the previous question and change your answer if necessary. Before we begin the actual survey, I would like to gather some preliminary information about your call.	
Q1	First, please enter the three-digit area code from where you are calling.	Record number
Q2	Thank you. Next, please provide an estimate of how long you were on the phone with the IRS on this call, including your time on hold? Please key in the number of minutes, followed by the pound sign.	Record number
Q3	When you called PPS today, how long did you wait on the phone before speaking to a live representative?	If your wait was less than 1 minute, enter 1. If your wait was more than a minute but less than 3 minutes enter 2. If your wait was more than 3 minutes but less than 5 minutes enter 3. If your wait was more than 5 minutes, enter 4.
Q4	Was this wait shorter than you expected, longer than you expected, or about what you expected	If your wait was shorter than you expected, enter 1. If it was longer than you expected, enter 2. If it was about what you expected, enter 3.
Q5	During this call, to what extent were your questions or issues resolved?	Enter 1 if they were completely resolved Enter 2 if they were partially resolved Enter 3 if they were not resolved at all
Q6	Did you call about a single case or about multiple cases?	If for a single case, enter 1 For multiple cases, enter 2 If this does not apply, enter 9.
Q7	Were the issues discussed concerning Individual accounts, business accounts or both?	For individual accounts, enter 1 For business accounts, enter 2 For both individual and business accounts, enter 3 If this does not apply, enter 9.
Q8	Was your issue an Employment tax account question, for example a 940 or 941 account?	If yes, enter 1 If no, enter 2.
	Thank you. The rest of this survey consists of 12 items related to the service you received during this call to the IRS. To repeat any question, Press the star key. For each of the following items, I will ask you to rate your satisfaction on a scale from 1 to 5, where <ul style="list-style-type: none"> <li>5 means you are completely satisfied,</li> <li>4 means you are somewhat satisfied,</li> <li>3 means you are neutral,</li> <li>2 means you are somewhat DIS-satisfied,</li> </ul> and 1 means you are completely DIS-satisfied.  If any question does not apply or if you do not have an answer, press 9. Now let's begin.	
Q9	Please rate your satisfaction with the length of your wait to talk to a representative.	[Rating 1-5, or 9 for Not Sure]
Q10	Please rate your satisfaction with the time it took to complete your call once you got through to a representative.	[Rating 1-5, or 9 for Not Sure]
Q11	Now rate your satisfaction with the knowledge and expertise of the representative.	[Rating 1-5, or 9 for Not Sure]

Q12	Next, please rate your satisfaction with the professionalism of the representative.	[Rating 1-5, or 9 for Not Sure]
Q13	Rate your satisfaction with the representative's willingness to listen to you and help you with your issue.	[Rating 1-5, or 9 for Not Sure]
Q14	Rate your satisfaction with the authority of the representative to make decisions regarding your issue.	[Rating 1-5, or 9 for Not Sure]
Q15	Now, rate your satisfaction with the completeness of getting your questions answered or your issues resolved during this call.	[Rating 1-5, or 9 for Not Sure]
Q15a	What about the completeness of getting your questions answered or your issues resolved during this call were you least satisfied with? Begin speaking at the tone. Press any key when you are finished.	[WAV]
Q16	Rate your satisfaction with the clarity of the information or instructions that you received during this call	[Rating 1-5, or 9 for Not Sure]
Q17	Overall, with everything considered, please rate your overall satisfaction with the service you received during this call	[Rating 1-5, or 9 for Not Sure]
	I have just a few more questions and we will be finished.	
Q18	Using the same five-point scale as before, how satisfied are you in general with the time it takes to receive materials from the IRS following a call to the Practitioner Priority Service?	[Rating 1-5, or 9 for Not Sure]
Q19	Which methods do you use to find information about tax law? a. Do you email the IRS to find information about tax law? b. Do you visit the IRS web site? c. Do you refer to IRS publications? d. Do you visit a Walk-in Taxpayer Assistance Center? e. Do you call a Toll Free Service? f. And lastly, do you use a commercial information service like CCH?	Please press 1 for 'Yes' or 2 for 'No' after each option
Q20	Which one of the options mentioned do you prefer the most?	Email, press 1 Web site, press 2 IRS publications, press 3 Walk-in Taxpayer Assistance Center, press 4 Toll Free Service, press 5 Commercial information service, press 6
Q21	Please indicate which of the following best describes your status as a tax preparer?	If mainly tax season, Self Employed, press 1 If year round tax service, Self Employed, press 2 If mainly tax season, Employee, press 3 If year round tax service, Employee, press 4
Q22	How many tax returns do you personally prepare in a calendar year?	Fewer than 50, press 1 51 - 150, press 2 151 - 500, press 3 501 - 1000, press 4 More than 1000, press 5
Q24	How many years have you prepared taxes?	Less than one year, press 1 1 - 5 years, press 2 6 -15 years, press 3 16- 25 years, press 4 26 - 35 years, press 5 More than 35 years, press 6
Q25	Please type in your age.	Record number
Q26	How frequently do you call the IRS' Practitioner Priority Service?	If you call once a week or more, enter 1. If you call at least once a month, enter 2.

		If you call less than once a month, enter 3.
	<p>This concludes our survey; thank you for participating! 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. If you would like to hear the address to which you may write, enter 1. Otherwise you may hang up to complete this call. Thank you</p>	