

## 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 10 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...
To Dial into CSS phone survey vendor
1. Press <b>OUTSIDE LINE #2</b>
2. Dial site appropriate number
<b>NOTE:</b> To use speed dials: OUTSIDE LINE 2, 2- or 3-digit number + ENTER.
<ul style="list-style-type: none"><li>• For <b>Toll Free</b>, use 55 (555 for Cleveland, Fresno, and St. Louis)</li><li>• For <b>PPS</b>, use 66</li><li>• For <b>TE/GE</b> use 88</li></ul>
3. Press <b>Enter</b> .

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
Q1	Rate your satisfaction with the ease of understanding the automated answering system menu and instructions.	[Rating 1-5, or 9 for Not Sure]
Q1a	What about the automated menu or instructions were you least satisfied with? Begin speaking at the tone. Press any key when you are finished.	[WAV]
Q2	Rate your satisfaction with finding the menu choice that fit your question or issue.	[Rating 1-5, or 9 for Not Sure]
Q3	Rate your satisfaction with the time it took to get through to the IRS when you called today	[Rating 1-5, or 9 for Not Sure]
Q3a	What about getting through to the IRS were you dissatisfied	[WAV]

	with? Begin speaking at the tone. Press any key when you are finished.	
Q4	Did you get through to the right person?	Yes, press 1 No, press 2 (skip to Q6) Not sure, press 9 (skip to Q6)
Q5	Rate your satisfaction with the time it took to get to the right person.	[Rating 1-5, or 9 for Not Sure]
Q6	Rate your satisfaction with the length of time it took to complete the call from when you first reached a representative.	[Rating 1-5, or 9 for Not Sure]
Q6a	Was the length of the call	Too Short, press 1 Too Long, press 2 Or just what you expected, press 3
	The following questions have to do with the IRS representative with whom you spoke. If you spoke with more than one, please consider the representative with whom you had the most contact. You may enter your response as soon as you know your answer.	
Q7	Rate your satisfaction with the knowledge of the representative.	[Rating 1-5, or 9 for Not Sure]
Q8	Rate your satisfaction with the friendliness of the representative.	[Rating 1-5, or 9 for Not Sure]
Q9	Rate your satisfaction with the representative's willingness to help you with your issue	[Rating 1-5, or 9 for Not Sure]
Q10	Rate your satisfaction with the fairness with which you were treated.	[Rating 1-5, or 9 for Not Sure]
Q11	Rate your satisfaction with authority of the representative to make decisions regarding your issue.	[Rating 1-5, or 9 for Not Sure]
Q12	Rate your satisfaction with getting all the information you needed during this call.	[Rating 1-5, or 9 for Not Sure]
Q12a	What are the main reasons you gave this rating?	[WAV]
Q13	Everything considered, rate your overall satisfaction with the service you received during this call.	[Rating 1-5, or 9 for Not Sure]
Q13a	Overall, what can the IRS do to improve the Toll Free service?	[WAV]
	There are just a few more questions left. Please listen carefully to the new response choices.	
Q14	Why did you call the Toll Free service today?	To request tax forms or instruction booklets, press 1 To answer a tax law question, press 2 The instructions in IRS publications were unclear, press 3 You received an IRS notice, press 4 To get tax account information, press 5 For any other reason, press 6
Q15	At the completion of your phone call, did you feel your issues were resolved?	If you feel they were completely resolved, press 1 For partly resolved, press 2 For not resolved, press 3 If you are not sure, press 9
Q15a	Why do you feel the issue was not completely resolved?	[WAV]

Q16	Including today, how many times have you called about this particular issue?	Press 1 through 8 for the number of times you have called Press 9 for 9 or more times.
Q17	Did you get different answers to the same questions on different calls?	Yes, press 1 No, press 2 Not sure, press 9
Q18	Did the IRS representative you spoke with know about what had been discussed on previous calls?	Yes, press 1 No, I had to start all over again, press 2
Q18a	Why did you call multiple times regarding this issue?	[WAV]
Q19	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, press 5 If you are not sure, press 9
Q20	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 30 minutes or longer, press 4
Q21	Did you use any other methods to resolve your tax issue before you called today?	Yes, press 1 No, press 2 (skip to Question 23)
Q22	Did you use any of the following methods to resolve your tax issue before you called today? a. Did you visit the Web site b. Did you use Tax software c. Did you visit a Paid Preparer d. Did you attempt to Email the IRS e. Did you visit a Taxpayer Advocate f. Did you send any Correspondence	Yes, press 1 No, press 2
Q23	If possible, would you use the IRS web site to get the service you sought today?	Yes, press 1 No due to lack of internet access, press 2 No because you prefer to speak with a person, press 3
Q24	Were you given an estimated wait time by the automated system while on hold during your call today?	If Yes, press 1. If No, press 2
Q25	How did advance notice of the waiting time affect your overall call experience?	If it had no effect, press 1 If positively, press 2 If negatively, press 3
Q26	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
Q27	For businesses with	Assets less than 10 million dollars, press 1 Otherwise, press 2.....skip to text before Q31
Q28	As a tax practitioner, if you are representing an individual who:	Filed a short form, press 1 An individual who filed a long form with no small business, farm, or supplemental income, press 2 An individual who filed a long form with small business, farm, or supplemental income, press 3 A business taxpayer, press 4 Or an exempt organization, press 5
Q29	If you are representing a business:	with assets less than 10 million dollars, press 1 Otherwise, press 2
Q30	If you	Filed short form 1040EZ, press 1 If you filed short form 1040A (did not itemize deductions), press 2 If you filed long form 1040 without other forms or

		schedules, press 3 If you filed long form 1040 with other forms or schedules, press 4 If you don't remember which form you filed, press 5
Q31	If you reported income or losses	from a farm or business you own, press 1 From rental property, press 2 From royalties, press 3 From a partnership or S Corporation, press 4 From an estate or trust, press 5 If you don't remember, press 6
Q32	If you filed:	a Form 2106 for employee business expenses, press 1 Otherwise, press 2
	Next, We would like to collect some quick demographic data to help relate your responses to the most relevant service areas.	
Q33	Is your income between:	\$500 and \$20,000, press 1 \$20,000 and \$35,000, press 2 \$35,000 and \$60,000, press 3 \$60,000 and \$100,000, press 4 over \$100,000, press 5 Press 6 if you prefer not to answer.
Q34	Please type in your age	[WAV]
Q35	We often do research on behalf of the IRS and need respondents for our research. Would you be willing to participate in future research? If so, please provide us with your phone number and email address if you have one. This information will be confidential and used only for the purpose of survey research. Research participants may receive a small monetary incentive to participate depending on the survey.	If you would like to participate, press 1.....skip to Q33a If you do not want to participate, press 2.....skip to Q34
Q36	Please type in phone number:	[WAV]
Q37	Please state and spell your first and last name:	[WAV]
Q38	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 to mail your comments?	If yes, press 1 If no, press 2
Q39	Mail your comments to: Internal Revenue Service Tax Products Coordinating Committee 1111 Constitution Ave., NW, Room 6510-S Washington DC 20224	To repeat this address, press 1. Otherwise, press 2.
Q40	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 telephone number of the Taxpayer Advocate, press 1. Otherwise, press 2.
Q41	If 1, the caller hears: The toll-free Taxpayer Advocate phone number is 1-877-777-4778.  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.	

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