

## 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 6 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:

If the taxpayer	Then respond
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. At any time during the survey, you may press the STAR key to repeat the question. You may enter your choice as soon as you know your answer.	
	The following questions deal with the reason you called today.	
Q1	If you called today regarding:	An exempt organization issue, press 1 An employee plan issue, press 2 A federal, state, or local government issue, press 3 An Indian Tribal Government issue, press 4 A tax-exempt bond issue, press 5 For other, press 6
Q2a	What is your relationship to the organization: (EO Only Question)	If you are an officer, director or other representative of an organization, press 1 If you are a volunteer in an exempt organization, press 2 Or if you are a lawyer or an accountant, press 3 Other, press 4
Q2b	What is your relationship to the employee pension plan: (EP Only Question)	If you are the sponsor for an employee plan, press 1 You are a plan participant, press 2 You are a lawyer or an accountant, press 3 Other, press 4
Q2c	What level of government do you represent: (FSLG Question Only)	If you are calling on behalf of a federal entity, press 1 If you are calling on behalf of a state entity, press 2 If you are calling on behalf of a local entity or municipality, press 3 Other, press 4
Q3a	If you called today: (EO Only)	For help in completing a form or application, press 1 To verify or conform an organization's exempt status, press 2 To obtain a copy of an exempt organization's determination letter, press 3 To check on Status of an Application, press 4 For help establishing an exempt organization, press 5 To respond to a notice, press 6 Other, press 7
Q3b	If you called today: (EP Only)	For help in completing a form or application, press 1 (go to question 4) To check on Status of Application, press 2 (go to question 3d) For help establishing an Employee Plan, press 3 go to question 4) To respond to a notice, press 4 (skip to question 4) Other, press 5 (go to question 4)
Q3c	If you called today: (GE Only)	For help in completing a form or application, press 1 (for to question 4) For responding to a notice, press 2 (go to question 4) Other, press 3 (skip to question 4)
Q3d	How long ago did you send your application to the IRS? (EO and EP Only)	Less than 60 days ago, press 1 61 to 90 days ago, press 2 91 to 120 days ago, press 3 More than 120 days ago, press 4

Q3e	If you requested: (EO Only)	Verbal confirmation over the phone, press 1 If you requested written confirmation, press 2
	The following questions have to do with the representative with whom you spoke. If you spoke with more than one, please consider the representative with who you spoke with last. You may enter your response as soon as you know your answer.  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	
Q4	Rate your satisfaction with the knowledge of the representative.	[Rating 1-5, or 9 for Not Sure]
Q5	Rate your satisfaction with the courtesy of the representative who handled your call.	[Rating 1-5, or 9 for Not Sure]
Q6	Rate your satisfaction with the professionalism of the representative of the representative who handled your call	[Rating 1-5, or 9 for Not Sure]
Q7	Rate your satisfaction with the representative's responsiveness to what you called about.	[Rating 1-5, or 9 for Not Sure]
Q8	Rate your satisfaction with the fairness with which you were treated.	[Rating 1-5, or 9 for Not Sure]
Q9	Rate your satisfaction with the friendliness of the representative	[Rating 1-5, or 9 for Not Sure]
	The next set of questions has to do with the amount of time you spent on the issue and the IRS's automated answering system. You may enter your response as soon as you know your answer.	
Q10	Rate your satisfaction with how easily the automated telephone system directed you to the correct person	[Rating 1-5, or 9 for Not Sure]
Q11	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]
Q12	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]
Q13	Rate your satisfaction with getting all the information you needed during this call.	[Rating 1-5, or 9 for Not Sure]
Q14	Everything considered, rate your overall satisfaction with the service you received during the call.	[Rating 1-5, or 9 for Not Sure]
Q14a	Overall, what can the IRS do to improve the Toll-Free service? Please be as specific as possible. Begin speaking at the tone. Press any key when you are finished	[WAV]
	We want to gather some more information about your call. Please listen carefully to the new	

	response choices.	
Q15	Including today, how many times have you called and discussed this particular issue with an IRS representative?	Press 1 through 4 for the number of times you have called Press 5 for 5 or more times.
Q16	Why did you call multiple times regarding this issue?	If you had follow-up questions to ask, press 1 If you were advised to call back, press 2 If you received different answers to your questions, press 3 For any other reasons, press 4
Q17	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 to 5 or more, press 5 If you are not sure, press 9
Q18	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 5 minutes, press 1 5 to 10 minutes, press 2 11 to 20 minutes, press 3 Longer than 20 minutes, press 4
Q19	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
Q20	Do you plan to call the toll-free TE/GE service again to attempt to resolve your issue?	Enter 1 for Yes 2 for No If you are unsure, press 3
	There are just a few more questions left. Please listen closely to the new response choices	
Q21	Did you attempt to solve your issue before calling the toll free service?	Yes, press 1 No, press 2 (Skip to text before Q24)
Q22	What was the MAIN method through which you attempted to resolve your issue before calling the toll free service?	IRS Form or publications, press 1 The IRS Website at irs.gov, press 2 Third Party source such as an accountant or attorney, press 3 Other, press 4
Q23	Why did you ultimately choose to call the toll free number to resolve your issue?	[WAV]
	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 Q24 If you do not want to participate, press 2.....skip to Q25
Q24	Please type in phone number	Record number
Q24a	Please state and spell your first and last name	[WAV]
	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.	

Q25	Would you like the address to mail your comments?	If yes, press 1 If no, press 2
	If Yes, caller hears: 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.
	Thank you for participating in this survey. Your information will help improve the services provided by the IRS. Thank you. Goodbye.	