

e-Help IVR Customer Satisfaction Questionnaire

IRS e-Help Questionnaire Rev. 2/25/16

Intro1 Thank you for participating in this voluntary survey. Your input will assist the IRS to improve its Toll-Free service for callers like you. This survey is being conducted by ICF International, an independent, third-party organization. All answers will be kept anonymous to the extent allowed by law. There are no penalties for not answering some or all of the survey questions.

Intro2 I am going to ask you several questions about your experiences during this call. At any point, press the star key to repeat the question. Press the pound key to repeat the choices. You may enter your response as soon as you know your answer.

Intro3 Please answer the 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

Please press the pound key to repeat the scale.

Intro4 Again, press the star key to repeat the question. Press the pound key to repeat the choices. You may enter your response as soon as you know your answer. Now let's begin.

[For every prompt: # - Repeat the choices, * - Repeat the question]

Q1 Everything considered, rate your overall satisfaction with the service you received during this call.
[Rating 1-5]

Inst1 The next two questions have to do with locating assistance at the IRS E-help Desk.

Q2 Rate your satisfaction with the ease of locating the E-Help Desk phone number.
[Rating 1-5]

Q3 Rate your satisfaction with finding the right menu choice for your problem or issue.
[Rating 1-5]

Inst2 These next few 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.

Q4 Rate your satisfaction with the courtesy of the representative who handled your call.
[Rating 1-5]

Q5 Rate your satisfaction with the professionalism of the representative who handled your call.
[Rating 1-5]

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Q6 Rate your satisfaction with the representative's willingness to help you with your issue.
[Rating 1-5]

Q7 Rate your satisfaction with the knowledge of the representative.
[Rating 1-5]

Q8 Rate your satisfaction with the ability of the representative to make decisions regarding your issue.
[Rating 1-5]
[If Q8=1/2, continue to Q9. If Q8=3/4/5, skip to Q10.]

[Ask Q9 only if Q8=1/2]

Q9 Please tell us why you were dissatisfied with the ability of the representative to make decisions. Press any key when you are finished.
[WAV] (open-ended verbatim)

Q10 Using the same rating scale... Rate your satisfaction with the length of time it took to complete the call from when you first reached a representative.
[Rating 1-5]

Q11 What is your professional role for this call?
[1] For electronic return originator, press 1;
[2] For Enrolled Agent, Certified Public Accountant, or Lawyer, press 2;
[3] For reporting agent, press 3;
[4] For Software Developer, press 4;
[5] For Transmitter, press 5;
[6] For Large Corporation, press 6,
[7] For Financial Institution, press 7,
[8] For Government Agency, press 8,
[9] For any other role, press 9.
[#] To hear these choices again, please press the pound key.

Q12 What product did you require assistance with during this call?
[1] For form 1040 efile, press 1,
[2] For forms 940, 941 or 944, press 2,
[3] For forms 1120, 1041, or 1065, press 3,
[4] For forms 720, 2290 or 8849, press 4,
[5] For e-services, press 5,
[6] For EFTPS, the Electronic Federal Tax Payment System, press 6,
[7] For Central Contractor Registration, press 7,
[8] For any other reason, press 8.

Inst3 The next few questions have to do with the amount of time you spent on the phone today, including time on hold while waiting for a representative, time talking with a representative, and total time on the call.

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Q13 Did you feel the time you spent on the phone with the representative was too long, too short or about right?

[1] For Too long, press 1;

[2] For Too short, press 2;

[3] For About right, press 3.

Q14 Please tell us why you feel that way. Begin speaking at the tone. Press any key when you are finished.

[WAV] (open-ended verbatim)

Q15 When you called today how long did you wait on the phone before speaking with a representative?

[1] If less than 3 minutes, press 1

[2] 3 to 10 minutes, press 2

[3] 11 to 30 minutes, press 3

[4] 31 minutes or more, press 4

Q16 In total, how many minutes did you spend on this call today including any time on hold, but not including the time spent answering this survey?

[1] If less than 10 minutes, press 1

[2] 10 to 20 minutes, press 2

[3] 21 to 30 minutes, press 3

[4] 31 minutes or more, press 4

Q17 Including today, how many times have you called about this particular issue?

[1-4] Press 1 through 4 for the number of times you have called;

[5] Press 5 for 5 or more times.

[If Q17=2/3/4/5 (called multiple times), continue to Q17a. If Q17=1 (called once), skip to Q18a.]

[Ask Q17a only if Q17=2/3/4/5]

Q17a Why did you call multiple times regarding this issue?

[1] If you had follow-up questions to ask, press 1

[2] If you were advised to call back, press 2

[3] If you received different answers to your questions, press 3

[4] For any other reasons, press 4

Q18a Did you use any of the following methods to resolve your issue before you called today?

Visit the IRS Web site (IRS.gov)

[1] If yes, press 1;

[2] If no, press 2

Q18b Use Tax software

[1] If yes, press 1;

[2] If no, press 2

Q18c Talk with a Paid Preparer

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- [1] If yes, press 1;
- [2] If no, press 2

Q18d Email the IRS

- [1] If yes, press 1;
- [2] If no, press 2

Q18e Visit an IRS walk-in office

- [1] If yes, press 1;
- [2] If no, press 2

Q18f Send Correspondence

- [1] If yes, press 1;
- [2] If no, press 2

Q19 Not counting this survey, how many people at the e-help Desk did you speak to during this call?

- [1-4] Press 1 through 4 for the number of people you spoke with
- [5] If you spoke to 5 or more, press 5

Q20 Did the e-help Desk representative you spoke with know about your previous calls?

- [1] Yes, press 1;
- [2] No, press 2

Q21 Did the e-help Desk representative answer all your questions today?

- [1] Yes, press 1;
 - [2] No, press 2
- [If Q21=1 (Yes), skip to Q23. If Q21=2 (No), continue to Q22.]

Q22 What information did you need that the e-help Desk representative did not provide? Begin speaking at the tone. Press any key when you are finished.

[WAV] (open-ended verbatim)

Q23 Will the information you received today eliminate the need for further calls on this issue?

- [1] Yes, press 1;
- [2] No, press 2

Q24 Overall, how well did the e-help Desk meet your expectations during your call today?

- [5] For Much better than expected, press 5
- [4] For Better than expected, press 4
- [3] For as expected, press 3
- [2] For Worse than expected, press 2
- [1] For much worse than expected, press 1

Q25 Please share how the e-help Desk can improve so that they would have better met your expectations during your call today. Begin speaking at the tone. Press any key when you are finished.

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[WAV] (open-ended verbatim)

OPTIN The IRS periodically asks ICF International to do additional research on taxpayer services. Would you be willing to be contacted by ICF to participate in future IRS research such as focus groups and other surveys on taxpayer services? If so, please provide us with your phone number and email address if you have one.

Our authority for requesting the information is 5 USC. and 26 USC 7801. The information you provide may be disclosed to an IRS contractor when authorized by law. The contractor is required to follow confidentiality protections required by the Privacy Act and/or Internal Revenue Code section 6103. Research participants may receive a small monetary incentive to participate depending on the research project.

[1] If you would like to participate, press 1

[2] If you do not want to participate, press 2

[If OPTIN=1 (Yes), continue to PHONE. If OPTIN=2 (No), skip to END1.]

PHONE Please type in a phone number where you can be reached.
[Enter multiple digits]

EMAIL Please state and spell your e-mail address. Press any key when you are finished.
[WAV] (open-ended verbatim)

NAME Please state and spell your first and last name.
[WAV] (open-ended verbatim)

END1 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 1545-2250. 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?

[1] Yes, press 1;

[2] No, press 2

[If END1=1 (Yes), continue to END2. If END1=2 (No), skip to END3.]

END2 Mail your comments to:
Special Services Section
1111 Constitution Avenue, NW,
SE:W:CAR:MP:T:M:S - Room 6129
Washington DC 20224.

[1] If you would like hear the address again, press 1. **[Repeat "Mail your comments to..."]**

[2] Otherwise, press 2.

END3 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. The toll-free Taxpayer Advocate phone number is 1-877-777-4778.

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[1] If you would like the telephone number of the Taxpayer Advocate, press 1. [**Repeat “The toll-free...”**]

[2] Otherwise, press 2.

END4 Thank you for participating in this survey. Your information will help improve the services provided by the IRS. Thank you. Goodbye.