

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. This survey is voluntary. 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 Aspect Phone/computer 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."

The primary purpose for requesting this information is to help the IRS improve its service to taxpayers. Our authority for requesting the information is 5 USC and 26 USC 7801.

Providing information is voluntary. However, if you do not answer all or part of the survey questions, the IRS may lack information it could use to improve taxpayer service. The information you provide may be disclosed to an IRS contractor when authorized by law. The contractor is required to follow protections required by the Privacy Act and /or Internal Revenue Code section 6103.

This survey is voluntary.

The OMB Control number for this survey is 1545-2250.

	Qs- TEGE	
Q Num	Questions	Possible Responses
instruction	<p>This call has been randomly selected to participate in a brief automated survey regarding the service you received today. The primary purpose for requesting this information is to help the IRS improve its service to taxpayers.</p>	
instruction	<p>Responding to this survey is voluntary. However, if you do not answer all or part of the survey questions, the IRS may lack information it could use to improve taxpayer service. The survey will take less than ten minutes. Would you like to participate in the survey?</p>	
instruction	<p>Thank you for agreeing to take this survey. To make sure that your answers are anonymous to the extent allowed by law, we are directing your call to an automated survey. Please hold for a few seconds while I transfer your call.</p>	
instruction	<p>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 Please press the pound key to repeat the scale.</p>	

1	For our first question - Everything considered, rate your overall satisfaction with the service you received during this call.	5pt. scale
instruction	The next few questions relate to the IRS's automated answering system.	
2	Rate your satisfaction with the ease of understanding the automated answering system menu.	5pt. scale
3	Rate your satisfaction with how well the menu choices fit your issue.	5pt. scale
4	Rate your satisfaction with how well the automated system helped you find the right person.	
instruction	These 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.	
5	Rate your satisfaction with the courtesy of the representative who handled your call.	
6	Rate your satisfaction with the professionalism of the representative who handled your call.	5pt. scale
7	Rate your satisfaction with the representative's willingness to help you with your issue.	5pt. scale
8	Rate your satisfaction with the knowledge of the representative.	5pt. scale
	-	5pt. scale
9	Rate your satisfaction with the length of time it took to complete your call from when you first reached a representative.	5pt. scale
10	When you called today, how long did you wait on the phone before speaking to a live representative? [1] Less than 3 minutes. [2] More than 3 minutes but less than 10 minutes. [3] More than 10 minutes	categorical
11	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	categorical
12	Did you feel the time you spent on the phone with the representative was too long, too short or about right?	categorical, w/skip
13	Please tell us why you feel that way. Begin speaking at the tone. Press any key when you are finished.	open

14	<p>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</p>	Categorical w/skip
14a	<p>[Exempt Org] What is your relationship to the organization: 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</p>	Categorical w/skip
14a1	<p>If you called today: For help in completing a form or application, press 1 (go to 14a1a) To verify or confirm 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</p>	Categorical w/skip
14a1a	<p>How long ago did you send your application to the IRS? 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 (EO and EP Only)</p>	Categorical w/skip
14a1b	<p>If you requested: Verbal confirmation over the phone, press 1 If you requested written confirmation, press 2 (EO Only)</p>	Categorical

14b	[Employee Pension] What is your relationship to the employee pension plan: 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 (EP Only Question)	Categorical w/skip
14b1	If you called today: 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 14b1a) For help establishing an Employee Plan, press 3 go to question 4) To respond to a notice,	Categorical w/skip
14b1a	How long ago did you send your application to the IRS? 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 (EO and EP Only)	Categorical
14c	[FSLG] What level of government do you represent: 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	Categorical w/skip
14d	If you called today: 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) (GE Only)	Categorical w/skip
15	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.	cagtegorical

16	[If Q15 > 1, <i>called multiple times</i>] 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	cagtegorical
17	Did you use any of the following methods to resolve your tax issue before you called today? 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	cagtegorical
18	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	cagtegorical
19	Did the IRS representative answer all your questions today?	y/n
20	Will the information you received today eliminate the need for further calls on this issue?	If no, Q22, if yes, Q23
21	What information did you need that the IRS representative did not provide? Begin speaking at the tone. Press any key when you are finished.	open
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 As expected, press 3 For Worse than expected, press 2 For much worse than expected, press 1	5pt. Scale
23	Please share how the IRS 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.	open
instruction	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.	
24	Would you like the address to mail your comments?	If no, Q27, if yes, skip to Address info

instruction	<p>Mail your comments to: Internal Revenue Service Special Services Section 1111 Constitution Ave., NW, SE:W:CAR:MP:T:M:S - Room 6129 Washington DC 20224</p>	
instruction	<p>If you have been unable to resolve any specific problems with your tax matter through the normal IRS channels, or now face a significant hardship due to the application of the tax law, we encourage you to contact the Taxpayer Advocate Service toll-free telephone number.</p>	<p>if yes, skip to TAS phone number, if No, skip to ending instructions</p>
instruction	<p>The Toll-Free Taxpayer Advocate phone number is 1-877-777-4778.</p>	
instruction	<p>Thank you for participating in this survey. Your information will help improve the services provided by the IRS. On behalf of the IRS and ICF International, thank you. Goodbye.</p>	