

Script for Appointment Line Follow-Up Web Survey

INTRO1

Welcome to the IRS Appointment Line Follow Up Survey. This follow-up study is voluntary and should only take around 5 minutes.

ICF, an independent research company, is conducting this survey on behalf of the IRS. ICF will not provide any identifying information to the IRS and will keep your identity private to the extent permitted by law.

You will be able to exit at any point and re-enter by using the link in your invitation email.

Privacy Statement

The authority requesting the information is 5 USC 301. The primary purpose of asking for the information is to determine steps IRS can take to improve our service to you. The information may be disclosed as authorized by the routine uses published for the Privacy Act System of Records entitled, Treas/IRS 00.001 Correspondence Files, including Stakeholder Partnership File, and Correspondence Control Files, as published in the Federal Register: December 10, 2001 (Volume 66, Number 237)] [Notices] pages 63785-6. Providing the information is voluntary. Not answering some or all of the questions will not affect you.

Paperwork Reduction Act Statement

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:

Internal Revenue Service
Special Services Committee
SE:W:CAR:MP:T:M:S – Room 6129
1111 Constitution Avenue NW
Washington, DC 20224

OMB Control Number displayed on all screens

The OMB number for this study is 1545-2290. Expiration Date: July 31, 2023

INTRODUCTION

//ASK ALL//

Reflecting on your overall experience beginning with your call to the IRS on [INSERT CALL DATE] through today, including any interactions/contact with the IRS during this time, please rate your level of agreement with the following statements.

- 5 Strongly agree
- 4 Agree
- 3 Neither agree nor disagree
- 2 Disagree
- 1 Strongly disagree

Q1a * This interaction increased my trust in the IRS. [Rating 5-1]

Q1b * I am satisfied with the service I received from the IRS. [Rating 5-1]

Q1_2 Any additional feedback on your scores? _____ [TEXT RANGE=5000]

Q1c * My need was addressed. [Rating 5-1]

Q1d * It was easy to complete what I needed to do. [Rating 5-1]

Q1e * It took a reasonable amount of time to do what I needed to do. [Rating 5-1]

Q1f * I was treated fairly. [Rating 5-1]

Q1g * The employees I interacted with were helpful. [Rating 5-1]

(* denotes OMB A-11 questions)

//ASK ALL//

Q2. What was the main tax issue that led you to contact the IRS on [INSERT CALL DATE]?

- 1) Transcript request
- 2) Make a payment
- 3) Account related issue
- 4) Obtain a tax form or publication
- 5) Understand a notice or letter from the IRS
- 6) A general tax law question
- 7) Obtain a tax identification number
- 8) Identity theft related issue
- 9) Sailing permit
- 10) Other, please describe: _____ [TEXT RANGE=5000]

88) NO ANSWER //HIDDEN//

//ASK ALL//

Q3. Were you provided the service you needed during the phone call on [INSERT CALL DATE] to resolve your main issue?

1) Yes

2) No

88) NO ANSWER //HIDDEN//

//ASK ALL//

//RESPONSE REQUIRED//

Q4. During your call to the IRS on [INSERT CALL DATE] if you scheduled an appointment for service at an IRS walk-in office, did you go to your scheduled appointment?

1) I did not schedule an appointment

2) Yes

3) No

WENT TO APPOINTMENT

//ASK IF Q4=2//

Q5. Did the information you received during your appointment eliminate the need for further contact with the IRS for your tax issue?

1) Yes

2) No

88) NO ANSWER //HIDDEN//

MADE APPOINTMENT BUT DID NOT GO

//ASK IF Q4=3//

Q6. Please select the primary reason you did not attend the appointment.

1) Tax issue was resolved prior to the appointment

2) Something came up that prevented you from going to the appointment

- 3) You forgot about the appointment
- 4) The IRS office cancelled your appointment

88) NO ANSWER //HIDDEN//

//ASK IF Q6=1//

Q7. How did you resolve your tax issue?

- 1) Visited an IRS Walk-in office before the scheduled appointment
- 2) Called the IRS Toll Free number
- 3) Mailed the IRS
- 4) Visited the IRS.gov website
- 5) Got advice from a Tax Professional
- 6) Got advice from a family member, friend, or coworker
- 7) Other, please specify _____ [SPECIFY]

88) NO ANSWER //HIDDEN//

CLOSING QUESTIONS

//ASK ALL//

Q8. Is the main reason for contacting the IRS on [INSERT CALL DATE] currently resolved?

- 1) Yes
- 2) No

88) NO ANSWER //HIDDEN//

That completes the survey.

Thank you very much for participating.