

Appointment Line Follow-Up Survey
WEB VERSION
9/10/20

Languages:
English & Spanish

SAMPLE VARIABLES:

SURVEY SAMPLE ELEMENTS

CALLDATE

Imported Sample Variable: Call Date

//DISPLAY ICF logo on all screens – upper left corner//
//DISPLAY IRS logo on all screens – upper right corner//
//DIPLAY at bottom of all screens: “For assistance with this survey, please email
(hyperlink with IRSApptSurvey@icf.com) or call 844-604-4397”//
//DISPLAY “Previous”, “Next”, “Stop” navigation buttons on all screens//
//PROGRAMMER – All questions provide Hidden no answer response unless
otherwise specified//
//PROGRAMMER – Display the following at the bottom on all screens: The OMB
number for this study is 1545-2290. Expiration Date: July 31, 2023//
//PROGRAMMER – Display the following when a required question is skipped: A
response is required for this question.//
//Display one question per page//

//SURVEY STOPPED PAGE//

Your responses have been saved. When you are ready to continue the survey,
please return by clicking or copying and pasting the link from the email you
received from ICF. You will then be taken to the point where you left off.

//INTRO PAGE//

//ASK ALL//

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:

*IRS Special Services Section,
1111 Constitution Avenue, NW,
SE:W:CAR:MP:T:M:S - Room 6129,
Washington, DC 20224*

///ASK ALL///

INSTRUCT

Instructions

Before you begin, here are some instructions about how the survey works:

- Click on the **NEXT //IN MOBILE: >>//** button to save your responses and continue to the next page.
- Click on the **PREVIOUS //IN MOBILE: <<//** button to view your responses on a previous page. You may change your answers to responses already entered. **Do not use your browser's Back button.** This may cause you to exit the survey.
- You may suspend the survey at any time by clicking the **STOP //IN MOBILE: |||//** button. You may re-enter the survey where you left off by clicking or copying and pasting the link from the email you received from ICF. If you close your browser without clicking **STOP //IN MOBILE: |||//**, the

survey will automatically halt and you will need to wait 10 minutes to re-access the survey and continue where you left off.

INTRODUCTION

//ASK ALL//

Q1_1. Reflecting on your overall experience beginning with your call to the IRS on [CALLDATE] 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
Q1b. This interaction increased my trust in the IRS.					
Q1a. I am satisfied with the service I received from the IRS.					

88 NO ANSWER //HIDDEN//

//ASK ALL//

//ALLOW 5000 CHARACTERS IN TEXT BOX//

Q1_2. Any additional feedback on your scores?

[TEXT BOX]

88 NO ANSWER //HIDDEN//

//ASK ALL//

Q1_3. Reflecting on your overall experience beginning with your call to the IRS on [CALLDATE] 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

			ee		
Q1c. My need was addressed.					
Q1d. It was easy to complete what I needed to do.					
Q1e. It took a reasonable amount of time to do what I needed to do.					
Q1f. I was treated fairly.					
Q1g. The employees I interacted with were helpful.					

88 NO ANSWER //HIDDEN//

//ASK ALL//

//ALLOW 5000 CHARACTERS IN TEXT BOX//

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

- 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 BOX]

888 NO ANSWER //HIDDEN//

//ASK ALL//

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

- 1 Yes
- 2 No

88 NO ANSWER //HIDDEN//

//ASK ALL//

//REQUIRED//

Q4. During your call to the IRS on [CALLDATE] if you scheduled an appointment for service at an IRS walk-in office, did you go to the 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 [TEXT BOX]

88 NO ANSWER //HIDDEN//

CLOSING QUESTIONS

//ASK ALL//

Q8. Is the main reason for contacting the IRS on [CALLDATE] currently resolved?

- 1 Yes
- 2 No

88 NO ANSWER //HIDDEN//

//ASK ALL//

CLOSING. That completes the survey.

Thank you very much for participating.