

21.10.1.9.5 (08-06-2015)

W&I Accounts Management and ACS Telephone Customer Satisfaction Survey

(1) CSR/CR Responsibilities:

- a. When the call the CSR/CR is assisting has been selected for the Customer Satisfaction Survey, the assistor will be notified their call was selected by a display on the ASPECT screen. They will no longer hear a beep. The teleset display will show as appropriate from the table below.

Survey	ASPECT Display
Toll-Free/ACS	TF Offer Cust Sat
PPS	PPS Offer Cust Sat
TE/GE	TEGE Offer Cust Sat Survey

- b. The display will show throughout the call, unless the caller is put on hold. Visually impaired employees using JAWS equipment are not required to participate in the Customer Satisfaction Survey process.

Note: If the CSR/CR 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.

- c. The CSR/CR will complete the call as usual.
- d. After the call is complete, the CSR/CR will read the following script exactly as written:

" This call has been randomly selected for an anonymous IRS improvement survey. It will take under eight minutes. Would you like to participate in the survey?"

- e. If the caller declines to participate, the CSR/CR will thank him/her and terminate the call.
- f. If the caller asks any questions about the survey, the CSR/CR will read the following as written:

If the caller	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 anonymous. 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. 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."

g. If the caller agrees to take the survey, say:

"Thank you. Please wait while I transfer you."

h. The employee will then proceed to transfer the call to the automated survey.

Take the following steps to transfer the call as appropriate for Aspect Teleset/Uniphi.

Do Not Place the Caller on Hold

- { Press/Click OUTSIDE LINE 2
- { Dial/Type the appropriate speed dial number from the table below - do not use the pound sign (#)
- { Hit/Click ENTER/CALL BUTTON and then immediately Hit/Click TRANSFER and then READY/RELEASE BUTTON

**DO NOT WAIT FOR EXTENSION TO PICKUP OR FOR FURTHER INSTRUCTIONS.**

Survey	Speed Dial Number
AM Toll-Free	55 (555 for Cleveland, Fresno and St. Louis)
PPS	66
TE/GE	88
ACS SBSE Sites	133
ACS W&I Sites	123

Automated Collection System (ACS) Survey  
Revised (April 2014)

- A. To take the survey in English, press 1  
To take the survey in Spanish, press 2

*Caller hears:*

*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 Pacific Consulting Group, 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*

*I am going to ask you several questions about your experiences during this call. 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*

*If you are not sure, press 9*

*Press the star key to repeat the question.*

*You may press the pound key to go back to the previous questions and change your answer if necessary.*

- 1 *Everything considered, rate your overall satisfaction with the service you received during this call.*  
  
*This question relates to the IRS' automated answering system.*
- 2 *Rate your satisfaction with the ease of understanding the automated answering system menu and instructions.*  
  
*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.*
- 3 *Rate your satisfaction with the courtesy of the representative who handled your call.*
- 4 *Rate your satisfaction with the professionalism of the representative who handled your call.*
- 5 *Rate your satisfaction with the representative's willingness to help you with your issue.*
- 6 *Rate your satisfaction with the knowledge of the representative.*
- 7 *Rate your satisfaction with how clearly the IRS representative explained your issue.*
- 8 *Rate your satisfaction with how well the IRS representative listened to your concerns.*
- 9 *Rate your satisfaction with how clearly the IRS representative explained the next steps in resolving your issue.*
- 10 *Rate your satisfaction with the length of time it took to complete your call from when you first reached a representative.*

Automated Collection System (ACS) Survey  
Revised (April 2014)

- 11 *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 10 minutes, press 1; 10 to 20 minutes, press 2; 21 to 30 minutes, press 3; 31 minutes or longer, press 4*
- 12 *If you think the time you spent on the phone with the representative was too short, press 1. If you think it was too long, press 2; if it was just right, press 3.*
- 13 *This question is regarding the type of account you called about. Is the account about...*  
*An individual who filed a short form (for example a 1040A or 1040EZ with no schedules), press 1*  
*An individual who filed a long form who is not self-employed, press 2*  
*An individual who filed a long form who is self-employed, press 3*  
*A business taxpayer, press 4*  
*Or an exempt organization, press 5*
- The next few questions are about your case and the call today*
- 14 *If you called today as the taxpayer, press 1; a tax practitioner, press 2; or someone else representing the taxpayer, press 3.*
- 15 *What was the reason you called today? You may enter your response as soon as you know your answer*  
*For a Levy, press 1*  
*For a Lien, press 2*  
*For a Balance Due other than a Levy or Lien, press 3*  
*For forms or mailing information press 4*  
*For Payment Verification, press 5*  
*For an Un-Filed Return, press 6*  
*For an Appeal, press 7*  
*To ask a general question or for any other reason, press 8*
- 16 *Did this call relate to a notice, bill, or letter you received recently from the IRS?*  
*If yes, press 1*  
*For no, press 2*  
*If you are not sure, press 9*  
*If 2 or 9 then skip to Q19*
- 17 *Rate your level of satisfaction with the clarity of the notice, bill, or letter.*  
*Please use the same rating scale where 1 is very Dissatisfied and 5 is very Satisfied*
- 18 *Rate your level of satisfaction with the tone of the notice, bill, or letter.*  
*If 1 or 2 for either Q17 or Q18, then ask Q18a; otherwise skip to Q19*
- COMPLETION POINT**
- 18a *What can IRS do to improve the clarity and/or tone of the notice, bill or letter you received? Begin speaking at the tone. Press any key when you are finished.*
- 19 *During the call, did the representative explain the specific actions you need to take to resolve your issue? If yes, press 1; if no, press 2; If not applicable, press 3*  
*If 2 or 3 then skip to Q21*

Automated Collection System (ACS) Survey  
Revised (April 2014)

- 20 *Did the representative explain what will happen if you do not take these actions? If yes, press 1; if no, press 2; If not applicable, press 3*
- 21 *To resolve your issue, are you required to follow-up with an additional phone call or mail-in correspondence?  
If yes, press 1; If no, press 2; If not applicable, press 3.  
If 2 or 3 then skip to Q23*
- 22 *Do you feel the time provided will be sufficient for you to follow-up? If yes, press 1; if no, press 2; If not applicable, press 3*
- 23 *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 with 5 or more people, press 5; if you are not sure, press 9*
- 24 *Did the IRS representative answer all your questions today? If Yes, press 1; if No, press 2; if Don't know, press 3*
- 25 *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 Worse than expected, press 2  
For Much worse than expected, press 1  
If 3, or 4, or 5 then skip to 26*
- 25a *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.*
- 26 *Do you have any comments or suggestions for the IRS regarding your experience today? Begin speaking at the tone. Press any key when you are finished.*
- 27 *The IRS periodically asks PCG to do additional research on taxpayer services. Would you be willing to be contacted by PCG 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 to the extent (allowed by law) 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.*
- If you would like to participate, press 1.....skip to Q28a  
If you do not want to participate, press 2.....skip to Q29*
- 28a *Please type in your ten-digit phone number beginning with the area code. Do not enter the 1 before the area code. (FTI)*

Automated Collection System (ACS) Survey  
Revised (April 2014)

28b *Please state and spell your first and last name. Begin speaking at the tone. Press any key when you are finished. (FTI)*

**End Section**

**Caller hears** *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.*

29 *Would you like the address to mail your comments?  
If yes, press 1  
If no, press 2*

*If yes, the caller hears:  
Mail your comments to:  
Internal Revenue Service,  
Special Services Section,  
SE:W:CAR:MP:T:M:S, 1111  
Constitution Ave. NW, Room  
6129, Washington, DC  
20224.*

29a *To repeat this address, press 1.  
Otherwise, press 2.*

30 *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. If you would like the telephone number of the Taxpayer Advocate, press 1. Otherwise, press 2.  
If 1, the caller hears:  
The toll-free Taxpayer Advocate phone number is 1-877-777-4778.*

30a *To repeat this telephone number, press 1.  
Otherwise, press 2.*

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