

## 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 10 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 <b>Aspect Phone/computer</b> 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.

Q Num		Prompt Text	Response Categories
inst		<p>Thank you for participating in this voluntary survey. This survey is being conducted by ICF International, an independent, third-party organization, to assist the IRS in improving its services. It will take about 10 minutes to complete. During this survey you will be asked to rate the service you received from the IRS on this call.</p>	
inst		<p>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.</p>	
		<p>To take the survey in English, press 1</p>	<p>1 for English</p>
		<p>To take the survey in Spanish, press 2</p>	<p>2 for Spanish</p>
inst		<p>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 Please press the pound key to repeat the scale.</p>	

inst		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.	
1		Everything considered, rate your overall satisfaction with the service you received during this call.	[Rating 1-5]
inst		The next <b>three</b> questions relate to the IRS's automated answering system.	
2		Rate your satisfaction with the ease of understanding the automated answering system menu	[Rating 1-5]
3		Rate your satisfaction with how well the menu choices fit your issue.	[Rating 1-5]
4		Rate your satisfaction with how well the automated system helped you find the right person.	[Rating 1-5]
inst		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.	
5		Rate your satisfaction with the courtesy of the representative who handled your call.	[Rating 1-5]

6		Rate your satisfaction with the professionalism of the representative who handled your call.	[Rating 1-5]
7		Rate your satisfaction with the representative's willingness to help you with your issue	[Rating 1-5]
8		Rate your satisfaction with the knowledge of the representative.	[Rating 1-5]
9		Rate your satisfaction with authority of the representative to make decisions regarding your issue.	[Rating 1-5]
inst		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.	
10		<b><u>Using the same rating scale....</u></b> Rate your satisfaction with the length of time it took to complete the call from when you first reached a representative.	[Rating 1-5]

11	When you called today how long did you wait on the phone before speaking with a representative?	[1] Less than 3 minutes. ; [2] More than 3 minutes but less than 10 minutes. ; [3] Between 10 and 20 minutes; [4] Between 20 and 30 minutes; [5] Over 30 minutes
12	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] Less than 3 minutes. ; [2] More than 3 minutes but less than 10 minutes. ; [3] Between 10 and 20 minutes; [4] Between 20 and 30 minutes; [5] Over 30 minutes
13	Did you feel call the time you spent on the phone with the representative was too long, too short or about right?	For Too long, press 1; For Too short, press 2; For about right, press 3
14	Please tell us why you feel that way. Begin speaking at the tone. Press any key when you are finished.	Open
	<b>Toll Free only place with time estimator - see below</b>	
15	Were you given an estimated wait time by the automated system while on hold your call today?	Yes, press 1 ; No, Press 2
16	Why did you call the Toll Free service today?	To request tax forms or instruction booklets, press 1; To answer a tax law question, press 2; The instructions in IRS publications were unclear, press 3; You received an

			IRS Notice, press 4; To get tax account information, press 5; For any other reason, press 6
inst			To hear these choices again, please press the pound key (#)
17		Including today, how many times have you called about this particular issue?	Press 1 through 4 for the number of times you have called; Press 5 for 5 or more times.
17A		<b>[If Q 17 &gt;1, called multiple times]</b> 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
18		Did you use any of the following methods to resolve your tax issue before you called today? a. Visit the IRS Web site (IRS.gov) b. Use Tax software c. Talk with a Paid Preparer d. Email the IRS e. Visit an IRS walk-in office Correspondence f. send	For each: if yes, press 1; if no, press 2
19		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
20		Did the IRS representative you spoke with know about your previous calls?	Yes, press 1; No, press 2

21	Did the IRS representative answer all your questions today?	Yes, press 1; No, press 2
22	Will the information you received today eliminate the need to further calls on this issue? [if no, Q 23 if yes, Q 24]	Yes, press 1; No, press 2
23	What information did you need that the IRS representative did not provide? Begin speaking at the tone. Press any key when you are finished.	[WAV]
24	If you called today as:	An individual taxpayer, press 1 A business taxpayer, press 2 An exempt organization, press 3 Or a tax practitioner, press 4
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 As expected, press 3 For Worse than expected, press 2 For much worse than expected, press 1
26	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.	[WAV]



	<p>The IRS periodically asks ICF to do additional research on taxpayer services. Would you be willing to be contacted by ICF Macro 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 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.</p>	<p>If you would like to participate, press 1.....skip to Q28  If you do not want to participate, press 2.....skip to Q30  If yes press 1 if no press 2</p>
	<p>Please type in phone number:</p>	
	<p>Please state and spell your e-mail address. Press any key when you are finished.</p>	
	<p>Please state and spell your first and last name:</p>	
	<p>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?</p>	
	<p>Mail your comments to:  Internal Revenue Service  Special Services Section  1111 Constitution Ave., NW,  <b>SE:W:CAR:MP:T:M:S - Room 6129</b></p>	

		Washington DC 20224	
		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.	
		Thank you for participating in this survey. Your information will help improve the services provided by the IRS. Thank you. Goodbye.	