

SBSE Innocent Spouse Toll-free IVR Survey
2/25/2016

MONITOR SECTION

| Step | Prompt Text | Response Categories | Skips |
|------|-------------|---------------------|----------|
| | | | Transfer |

RESPONDENT SECTION

| Question # | Step | Prompt Text | Response Categories | Skips |
|------------|------|---|---|--------------|
| | 1 | <p>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 Fors Marsh 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</p> <p>Please press the star key to repeat the question. You may enter your response as soon as you know your answer.</p> | | Go to step 2 |
| TAXPAYER | 1a | If you are... | <p>The taxpayer, press 1</p> <p>A tax professional who represented the taxpayer, press 2</p> <p>Someone else who assisted the taxpayer, press 3</p> | |
| | 2 | <p>I am going to ask you several questions about your experiences during this call. Please answer the questions using the following scale:</p> <p>Press 5 for very satisfied Press 4 for somewhat satisfied Press 3 for neither satisfied nor dissatisfied Press 2 for somewhat dissatisfied Press 1 for very dissatisfied If you are not sure, press 9</p> <p>You may enter your response as soon as you know your answer.</p> <p>Please press the star key to repeat the question. Please press the</p> | <p>PROGRAMMING NOTE: Repeating the Question and Scale</p> <p>Please program in a delayed reminder. If no key is pressed within 4 seconds, the respondent would hear, "I'm sorry. I didn't hear your response. Please press the star key to hear the question again. Please press the pound key to hear the scale again."</p> <p>If still no response after another 4 seconds, the respondent would hear, "I'm sorry. I still did not hear your response to this question. Let's move on to the next question."</p> | Go to step 3 |

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| | | pound key to repeat the scale. | | |
| Q1 | 3 | For our first question, everything considered, rate your overall satisfaction with the service you received during this call. | [Satisfaction 1-5, 9 scale] | Go to step 5 |
| | 4 | <i>THIS STEP IS FOR AUR ONLY.</i> | | |
| | 5 | 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. | | Go to step 6 |
| Q2 | 6 | Rate your satisfaction with the courtesy of the representative who handled your call. Please press the star key to repeat the question. Please press the pound key to repeat the scale. | [Satisfaction 1-5, 9 scale] NOTE: In addition to Delayed Reminder options above, add the instructions to Q6 as the first reminder. | Go to step 7 |
| Q3 | 7 | Rate your satisfaction with the professionalism of the representative who handled your call. | [Satisfaction 1-5, 9 scale] | Go to step 8 |
| Q4 | 8 | Rate your satisfaction with the representative's willingness to help you with your issue. | [Satisfaction 1-5, 9 scale] | Go to step 9 |
| Q5 | 9 | Rate your satisfaction with the knowledge of the representative. | [Satisfaction 1-5, 9 scale] | Go to step 10 |
| Q6 | 10 | Rate your satisfaction with how clearly the IRS representative explained your issue. | [Satisfaction 1-5, 9 scale] | Go to step 11 |
| Q7 | 11 | Rate your satisfaction with how well the IRS representative listened to your concerns. | [Satisfaction 1-5, 9 scale] | Go to step 12 |
| Q8 | 12 | Rate your satisfaction with how clearly the IRS representative explained the next steps in resolving your claim? | [Satisfaction 1-5, 9 scale] | Go to step 13 |
| Q9 | 13 | Rate your satisfaction with the length of time it took to complete your call from when you first reached a representative. | [Satisfaction 1-5, 9 scale] | If 1 or 2, go to step 14 If 3, 4, 5, go to step 16 |
| Q10 | 14 | 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 If You Are Not Sure, press 4 | If 1 or 2, go to step 15 If 3 or 4, go to step 16 |
| Q11 | 15 | Please tell us why you feel that way. Begin speaking at the tone. Press any key when you are finished. | [WAV Capture] | Go to step 16 |
| Q12 | 16 | What was the reason you called <i>today</i> ? You may enter your response as soon as you know your answer. | To get an explanation of the letter you received, press 1 To let the IRS know you mailed or faxed documents in, press 2 To ask about the status of your request for Innocent Spouse relief, press 3 | If 1 then go to step 18, else go to step 19. |

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| | | | To ask a general question or for any other reason, press 4 To hear these choices again, press the pound key. | |
| | 17 | <i>THIS STEP IS FOR AUR ONLY</i> | | |
| Q13 | 18 | What could the IRS do to make the letter or notice you called about clearer? Begin speaking at the tone. Press any key when you are finished. | [WAV Capture] | Go to step 19 |
| Q14 | 19 | Including today, how many times have you called and discussed the particular issue raised in your notice or letter with an IRS representative? | Press 1 through 4 for the number of times you have called Press 5 for 5 or more times | Go to step 20 |
| Q15 | 20 | How many minutes did you spend on this call today 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 To hear these choices again, press the pound key. | Go to step 21 |
| Q16 | 21 | Did the IRS representative answer all your questions today? | For Yes, press 1 For No, press 2 If You Are Not Sure, press 3 | If 2 or 3 go to step 22, if 1 then go to step 23 |
| Q17 | 22 | 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 Capture]. | Go to step 23 |
| Q18 | 23 | Will the information you received today eliminate the need for further calls on this issue? | For Yes, press 1 For No, press 2 If You Are Not Sure, press 3 | Go to step 24 |
| Q19 | 24 | 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 1 or 2 then go to step 25; otherwise go to step 26. |
| Q20 | 25 | 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 Capture] | Go to Step 26 |

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| Q21 | 26 | The IRS continually looks for ways to improve its service to taxpayers who contact them. We would like to give you an opportunity to provide comments or suggestions for improvements. We welcome your feedback. You can begin speaking at the tone. Press any key when you are finished. | [WAV Capture] | Go to step 27 |
| Q22 | 27 | The IRS periodically asks FMG to do additional research on taxpayer services. Would you be willing to be contacted by FMG 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, confidentiality 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. If you do not want to participate, press 2. | If 1, go to step 28 If 2, go to step 32 |
| Q23 | 28 | Please enter your 10-digit telephone number, including area code. | [Enter 10 digits] | Go to step 29 |
| | 29 | You entered: (XXX) XXX-XXXX | If this is correct, press 1. To re-enter, press 2. | Go to step 30 |
| Q24 | 30 | Please state and spell your e-mail address. Press any key when you are finished. | [WAV Capture] | Go to step 31 |
| Q25 | 31 | Please state and spell your first and last name. Press any key when you are finished. | [WAV Capture] | Go to step 32 |
| | 32 | 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. | | Go to step 33 |
| Q26 | 33 | Would you like the address to mail your comments? | If Yes, press 1 If No, press 2 | If 1, go to step 34 If 2, go to step 35 |
| | 34 | 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. | To repeat this address, press 1. Otherwise, press 2. | Go to step 35 |

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| Q27 | 35 | 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. | If you would like the telephone number of the Taxpayer Advocate, press 1. Otherwise, press 2. | If 1, go to step 36 If 2, go to step 37 |
| | 36 | The Toll-Free Taxpayer Advocate phone number is 1-877-777-4778. | To repeat this telephone number, press 1. Otherwise, press 2. | Go to step 37 |
| | 37 | Thank you for participating in this survey. Your information will help improve the services provided by the IRS. On behalf of the IRS and FMG, thank you. Goodbye. | | |