

Survey Name: IRS Appointment Line – IVR

// Programming Note: This is an IVR survey. For each question the question text is a wav file played for respondents. Questions cannot be refused. This survey is also offered in Spanish; for Spanish IVR text please see "[Appt Line IVR Survey Recordings Version 7.docx](#)" //

Item #: 1

Question type: Single Select

IVR Variable Name: LANG

Data Variable Name: LANG

IVR Variable Text: To take the survey in English, press 1.

Data Variable Label: LANG: Language respondent selected to take survey in

IVR Value	IVR Value Label	Data Value	Data Value Label
1	English	1	1: English
2	Spanish	2	2: Spanish

Item #: 2

Question type: Single Select

IVR Variable Name: INTRO2

Data Variable Name: Not used in the data

IVR Variable Text: Thank you for participating in this voluntary survey. It should only take around 5 minutes. Your input will help the IRS improve its service for callers like you. This survey is being conducted by FORS MARSH GROUP, an independent, third-party organization. There are no penalties for not answering some or all of the survey questions.

The information that you provide will be fully protected to the extent allowed under the Freedom of Information Act.

This survey is authorized under the Paperwork Reduction Act. We are required by law to report to you the OMB Control Number for this public information request. That number is 1545-2290 with an expiration date of July 31, 2023. Data collected will be shared with IRS staff, but your responses will be used for research and aggregate reporting purposes only and will not be used for other non-statistical or non-research purposes such as direct enforcement activities. 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.

If you would like to hear the address to which you may write, press 1. To continue to the survey, press 2.

Value	Value Label
1	Hear the address
2	Continue

//ASK IF INTRO2=1; ELSE SKIP TO INTRO3//

Item #: 3

Question type: Single Select

IVR Variable Name: QA

Data Variable Name: Not used in the data

IVR Variable Text: Please write to: IRS Special Services Section, 1111 Constitution Avenue, NW, SE:W:CAR:MP:T:M:S - Room 6129, Washington, DC 20224.

If you would like to hear the address again, press 1. Otherwise, press 2.

Value	Value Label
1	Play again
2	Continue
-100	Valid Skip

Item #: 4

Question type: Description

IVR Variable Name: INTRO3

Data Variable Name: Not used in the data

IVR Variable Text: I am going to ask you several questions about your experiences during this call. At any point, press the star key (*) to repeat the question. You may enter your response as soon as you know your answer.

Please rate your agreement with the next statements using the following scale:

Press 5 for strongly agree, press 4 for agree, press 3 for neither disagree nor agree, press 2 for disagree, press 1 for strongly disagree.

Again, press the star key to repeat the statement. You may enter your response as soon as you know your answer.

Item #: 5

Question type: Single Select

IVR Variable Name: Q1

Data Variable Name: Q1

IVR Variable Text: Let's begin. The first statement is: This interaction increased my trust in the IRS. Press 5 for strongly agree, press 4 for agree, press 3 for neither disagree nor agree, press 2 for disagree, press 1 for strongly disagree.

Data Variable Label: Q1: This interaction increased my trust in the IRS.

IVR Value	IVR Value Label	Data Value	Data Value Label
1	Strongly disagree	1	1: Strongly Disagree
2	Disagree	2	2: Disagree
3	Neither disagree nor agree	3	3: Neither Disagree nor Agree
4	Agree	4	4: Agree
5	Strongly agree	5	5: Strongly Agree

Item #: 6

Question type: Single Select

IVR Variable Name: Q2

Data Variable Name: Q2

IVR Variable Text: I am satisfied with the service I received from the IRS. Press 5 for strongly agree, press 4 for agree, press 3 for neither disagree nor agree, press 2 for disagree, press 1 for strongly disagree.

Data Variable Label: Q2: I am satisfied with the service I received from the IRS.

IVR Value	IVR Value Label	Data Value	Data Value Label
1	Strongly disagree	1	1: Strongly Disagree
2	Disagree	2	2: Disagree
3	Neither disagree nor agree	3	3: Neither Disagree nor Agree
4	Agree	4	4: Agree
5	Strongly agree	5	5: Strongly Agree

Item #: 7

Question Type: Single Select

IVR Variable Name: Q3A

Data Variable Name: Not used in the data

IVR Variable Text: Any additional feedback on your scores?
For Yes, press 1. For No, press 2.

Data Variable Label	Value Label
1	Yes
2	No

//ASK IF Q3A=1; ELSE SKIP TO Q4//

Item #: 8

Question Type: Open Ended Essay – This will be a recording.

IVR Variable Name: Q3

Data Variable Names: Q3txt

IVR Variable Text: Please provide feedback on your scores. Press one, then begin speaking at the tone. Press pound when you are finished.

Data Variable Label: Q3txt: Any additional feedback on your scores (Verbatims)?

Data Variable Label
Data Variable Label

Value	Value Label
-100	Valid Skip

Item #: 9

Question type: Single Select

IVR Variable Name: Q4

Data Variable Name: Q4

IVR Variable Text: Reflecting on your overall experience beginning with your call to the IRS and through today, please rate your level of agreement with the following statements, starting with...My need was addressed. Press 5 for strongly agree, press 4 for agree, press 3 for neither disagree nor agree, press 2 for disagree, press 1 for strongly disagree.

Data Variable Label: Q4: My need was addressed.

IVR Value	IVR Value Label	Data Value	Data Value Label
1	Strongly disagree	1	1: Strongly Disagree
2	Disagree	2	2: Disagree
3	Neither disagree nor agree	3	3: Neither Disagree nor Agree
4	Agree	4	4: Agree
5	Strongly agree	5	5: Strongly Agree

Item #: 10

Question type: Single Select

IVR Variable Name: Q5

Data Variable Name: Q5

IVR Variable Text: It was easy to complete what I needed to do. Press 5 for strongly agree, press 4 for agree, press 3 for neither disagree nor agree, press 2 for disagree, press 1 for strongly disagree.

Data Variable Label: Q5: It was easy to complete what I needed to do.

IVR Value	IVR Value Label	Data Value	Data Value Label
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1	Strongly disagree	1	1: Strongly Disagree
2	Disagree	2	2: Disagree
3	Neither disagree nor agree	3	3: Neither Disagree nor Agree
4	Agree	4	4: Agree
5	Strongly agree	5	5: Strongly Agree

Item #: 11

Question type: Single Select

IVR Variable Name: Q6

Data Variable Name: Q6

IVR Variable Text: It took a reasonable amount of time to do what I needed to do. Press 5 for strongly agree, press 4 for agree, press 3 for neither disagree nor agree, press 2 for disagree, press 1 for strongly disagree.

Data Variable Label: Q6: It took a reasonable amount of time to do what I needed to do.

IVR Value	IVR Value Label	Data Value	Data Value Label
1	Strongly disagree	1	1: Strongly Disagree
2	Disagree	2	2: Disagree
3	Neither disagree nor agree	3	3: Neither Disagree nor Agree
4	Agree	4	4: Agree
5	Strongly agree	5	5: Strongly Agree

Item #: 12

Question type: Single Select

IVR Variable Name: Q7

Data Variable Name: Q7

IVR Variable Text: I was treated fairly. Press 5 for strongly agree, press 4 for agree, press 3 for neither disagree nor agree, press 2 for disagree, press 1 for strongly disagree.

Data Variable Label: Q7: I was treated fairly.

IVR Value	IVR Value Label	Data Value	Data Value Label
1	Strongly disagree	1	1: Strongly Disagree
2	Disagree	2	2: Disagree
3	Neither disagree nor agree	3	3: Neither Disagree nor Agree
4	Agree	4	4: Agree
5	Strongly agree	5	5: Strongly Agree

Item #: 13

Question type: Single Select

IVR Variable Name: Q8

Data Variable Name: Q8

IVR Variable Text: The employees I interacted with were helpful. Press 5 for strongly agree, press 4 for agree, press 3 for neither disagree nor agree, press 2 for disagree, press 1 for strongly disagree.

Data Variable Label: Q8: The employees I interacted with were helpful.

IVR Value	IVR Value Label	Data Value	Data Value Label
1	Strongly disagree	1	1: Strongly Disagree
2	Disagree	2	2: Disagree
3	Neither disagree nor agree	3	3: Neither Disagree nor Agree
4	Agree	4	4: Agree
5	Strongly agree	5	5: Strongly Agree

// Programming Note: Respondents are considered COMPLETE (INT99=CO) after Q8 //

Item #: 14

Question type: Single Select

IVR Variable Name: Q9

Data Variable Name: Q9

IVR Variable Text: What was the main tax issue that led you to contact the IRS today?

For transcript request, press 1. For make a payment, press 2. For account related issue, press 3. For obtain a tax form or publication, press 4. For understand a notice or letter from the IRS, press 5. For a general tax law question, press 6. For obtain a tax identification number, press 7. For identity theft related issue, press 8. For sailing permit, press 9. For tax return or refund, press pound. For something else, press 0.

Data Variable Label: Q9: What was the main tax issue that led you to contact the IRS today?

IVR Value	IVR Value Label	Data Value	Data Value Label
1	Transcript request	1	1: Transcript request
2	Make a payment	2	2: Make a payment
3	Account related issue	3	3: Account related issue
4	Obtain a tax form or publication	4	4: Obtain a tax form or publication
5	Understand a notice or letter from the IRS	5	5: Understand a notice or letter from the IRS
6	General tax law question	6	6: A general tax law question
7	Obtain a tax identification number	7	7: Obtain a tax identification number
8	Identify theft related issue	8	8: Identify theft related issue
9	Sailing permit	9	9: Sailing permit
0	For something else	10	10: Something else
#	Tax return or refund	11	11: Tax return or refund

//ASK IF Q9=0; ELSE SKIP TO Q10//

Item #: 15

Question Type: Open Ended Essay – This will be a recording.

IVR Variable Name: Q9A

Data Variable Name: Q9atxt

IVR Variable Text: Please explain what tax issue you were calling about. Press one, then begin speaking at the tone. Press pound when you are finished.

Data Variable Label: Q9atxt: Please explain what tax issue you were calling about (Verbatims).

Data Variable Label

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Value	Value Label
-100	Valid Skip

Item #: 16

Question Type: Single Select

IVR Variable Name: Q10

Data Variable Name: Q10

IVR Variable Text: Did the representative offer to try and resolve your main tax issue over the phone? For Yes, press 1. For No, press 2.

Data Variable Label: Q10: Did the representative offer to try and resolve your main tax issue over the phone?

IVR Value	IVR Value Label	Data Value	Data Value Label
1	Yes	1	1: Yes
2	No	2	2: No

Item #: 17

Question type: Single Select

IVR Variable Name: Q11

Data Variable Name: Q11

IVR Variable Text: 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.

Data Variable Label: Q11: Overall, how well did the IRS meet your expectations during your call today?

IVR Value	IVR Value Label	Data Value	Data Value Label
1	Much worse than expected	1	1: Much worse than expected
2	Worse than expected	2	2: Worse than expected
3	As expected	3	3: As expected
4	Better than expected	4	4: Better than expected
5	Much better than expected	5	5: Much better than expected

Item #: 18

Question Type: Single Select

IVR Variable Name: Q12

Data Variable Name: Q12

IVR Variable Text: Did the IRS representative answer all of your questions on the call today? For Yes, press 1. For No, press 2.

Data Variable Label: Q12: Did the IRS representative answer all of your questions on the call today?

IVR Value	IVR Value Label	Data Value	Data Value Label
1	Yes	1	1: Yes
2	No	2	2: No

Item #: 19

Question Type: Single Select

IVR Variable Name: Q13

Data Variable Name: Q13

IVR Variable Text: Will the information you received today eliminate the need for further contact with the IRS for your main tax issue? For Yes, press 1. For No, press 2.

Data Variable Label: Q13: Will the information you received today eliminate the need for further contact with the IRS for your main tax issue?

IVR Value	IVR Value Label	Data Value	Data Value Label
1	Yes	1	1: Yes
2	No	2	2: No

Item #: 20

Question type: Single Select

IVR Variable Name: Q14

Data Variable Name: Q14

IVR Variable Text: If you made an appointment for assistance on the call today, how long from now is your appointment? If you did not make an appointment, press 1. For same day, press 2.

For next business day, press 3. For between 2 and 5 business days, press 4. For 2 weeks, press 5. For 3 weeks, press 6. For more than 3 weeks, press 7.

Data Variable Label: Q14: If you made an appointment for assistance on the call today, how long from now is your appointment?

IVR Value	IVR Value Label	Data Value	Data Value Label
1	Did not make an appointment	1	1: Did not make an appointment
2	Same day	2	2: Same day
3	Next business day	3	3: Next business day
4	Between 2 and 5 business days	4	4: Between 2 and 5 business days
5	2 weeks	5	5: 2 weeks
6	3 weeks	6	6: 3 weeks
7	More than 3 weeks	7	7: More than 3 weeks

//ASK IF Q14=2-7; ELSE SKIP TO 16A//

Item #: 21

Question type: Single Select

IVR Variable Name: Q15

Data Variable Name: Q15

IVR Variable Text: How long did you expect to wait between requesting an appointment and the actual appointment? For same day, press 1. For next business day, press 2. For between 2 and 5 business days, press 3. For 2 weeks, press 4. For 3 weeks, press 5. For more than 3 weeks, press 6.

Data Variable Label: Q15: How long did you expect to wait between requesting an appointment and the actual appointment?

IVR Value	IVR Value Label	Data Value	Data Value Label
1	Same day	1	1: Same day
2	Next business day	2	2: Next business day
3	Between 2 and 5 business days	3	3: Between 2 and 5 business days
4	2 weeks	4	4: 2 weeks
5	3 weeks	5	5: 3 weeks
6	More than 3 weeks	6	6: More than 3 weeks
-100	Valid Skip	-100	Valid Skip

//ASK IF Q14=1//

Item #: 22

Question type: Single Select

IVR Variable Name: Q16A

Data Variable Name: Q16

IVR Variable Text: The IRS would like to follow up with you in a month or so to better understand the taxpayer experience after the call including satisfaction, and issue resolution. 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. FORS MARSH GROUP is required to follow confidentiality protections required by the Privacy Act and/or Internal Revenue Code section 6103. Would you be willing for FORS MARSH GROUP to contact you in order to participate in a brief follow-up survey? For Yes, press 1. For No, Press 2.

Data Variable Label: Q16: Would you be willing for FMG to contact you in order to participate in a brief follow-up survey?

IVR Value	IVR Value Label	Data Value	IVR Value Label
1	Yes	1	1: Yes
2	No	2	2: No
-100	Valid Skip		Valid Skip

///IF Q16A=1 Skip to Q18//

///IF Q16A=2 Skip to SURVEND (INT99 will be set to CO)//

//ASK IF Q14=2-7 //

Item #: 23

Question type: Single Select

IVR Variable Name: Q16B

Data Variable Name: Q16

IVR Variable Text: The IRS would like to follow up with you after your appointment at the walk-in office to gather taxpayer feedback on the entire process. 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. FORS MARSH GROUP is required to follow confidentiality protections required by the Privacy Act and/or Internal Revenue Code section 6103. Would you be willing for FORS MARSH GROUP to contact you in order to participate in a brief follow-up survey?

For Yes, press 1. For No, Press 2.

IVR Value	IVR Value Label	Data Value	IVR Value Label
1	Yes	1	1: Yes
2	No	2	2: No
-100	Valid Skip		Valid Skip

///IF Q16B=2 Skip to SURVEND (INT99 will be set to CO)//

//ASK IF Q16B=1 //

Item #: 24

Question type: Keyed in value #####

IVR Variable Name: Q17

Data Variable Name: Q17

IVR Variable Text: When is your appointment with the IRS? Please enter the 2-digit month and the 2-digit day of your appointment. Press pound when you are finished.

Data Variable Label: Q17: When is your appointment with the IRS? Please enter the 2-digit month and the 2-digit day of your appointment.

[MMDD]

Item #: 25

Question type: Single Select

IVR Variable Name: STEP17

Data Variable Name: Not used in the data

IVR Variable Text: You entered [MMDD].

If this is correct, press 1. To re-enter, press 2.

Value	Value Label
1	Correct
2	Re-enter
-100	Valid Skip

//IF STEP17=2 Skip to Q17//

//ASK IF Q16A OR Q16B=1 //

Item #: 26

Question Type: Open Ended Essay – This will be a recording.

IVR Variable Name: Q18

Data Variable Name: Not used in the data

IVR Variable Text: Please state and spell your first and last name. Press one, then begin speaking at the tone. Press pound when you are finished.

//ASK IF Q16A OR Q16B=1 //

Item #: 27

Question Type: Open Ended Essay – This will be a recording.

IVR Variable Name: Q19

Data Variable Name: Not used in the data

IVR Variable Text: Please state and spell your email address if we may send you an email to participate in the follow-up survey. Press one, then begin speaking at the tone. Press pound when you are finished.

//ASK IF Q16A OR Q16B=1 //

Item #: 28

Question type: Single Select

IVR Variable Name: Q20A

Data Variable Name: Not used in the data

IVR Variable Text: Would you like to provide your 10-digit phone number so that we may contact you by phone for the follow-up survey?

For Yes, press 1. For No, Press 2.

Value	Value Label	
1	Yes	
2	No	
-100	Valid Skip	

///IF Q20A=2 Skip to Q21//

//ASK IF Q20A=1 //

Item #: 29

Question type: Keyed in value

IVR Variable Name: Q20AC

Data Variable Name: Not used in the data

IVR Variable Text: Please enter your 3 digit area code. Press pound when finished.

[###]

//ASK IF Q20A=1 //

Item #: 30

Question type: Keyed in value

IVR Variable Name: Q20REST

Data Variable Name: Not used in the data

IVR Variable Text: Please enter the rest of your phone number without the area code. Press pound when finished.

[### #####]

//ASK IF Q20A=1 //

Item #: 31

Question type: Single Select

IVR Variable Name: STEP20

Data Variable Name: Not used in the data

IVR Variable Text: You entered [### ### #####].

If this is correct, press 1. To re-enter, press 2.

Value	Value Label	
1	Correct	
2	Re-enter	
-100	Valid Skip	

//IF STEP20=2 Skip to Q20AC//

//ASK IF Q16A OR Q16B=1 //

Item #: 32

Question type: Single Select

IVR Variable Name: Q21

Data Variable Name: Q21

IVR Variable Text: FORS MARSH GROUP also occasionally conducts additional in-depth research related to the IRS Appointment Line. Would you be willing for FORS MARSH GROUP to contact you using the information you just provided in order to participate in a focus group or other research? For Yes, press 1. For No, Press 2.

Data Variable Label: Q21: Would you be willing for FMG to contact you using the information you just provided in order to participate in a focus group or other research?

IVR Value	IVR Value Label	Data Value	IVR Value Label
1	Yes	1	1: Yes
2	No	2	2: No
-100	Valid Skip		Valid Skip

Item #: 33

Question type: Description

IVR Variable Name: SURVEND

Data Variable Name: Not used in the data

IVR Variable Text: That completes the survey. Thank you for participating. Goodbye.

Value	Value Label
CO	Completed – INT99 = CO
