OLA Testing

Upcoming Interview Reminder

Phone Script

Hi, may I speak to [Taxpayer's Name]?

IF PERSON NOT AVAILABLE, READ: Okay, thank you for letting me know. Can you provide a different phone number to reach [Taxpayer's Name]? or let me know the most convenient time to contact them?

RECORD THE RESPONSE_____

Thank you for that information. Hope you have a great rest of your day (end phone call).

IF YOU GOT THE WRONG NUMBER, READ: I apologize for getting the wrong number. Hope you have a great rest of your day (end phone call).

IF YOU ARE SPEAKING WITH THE PERSON, READ:
My name is [Your Name], and I am calling from Pacific Consulting Group on behalf of the Internal Revenue Service (IRS) regarding the Online Accounts Usability study you agreed to participate in.

I am calling to remind you of the virtual one-on-one interview you have scheduled on [DATE AND TIME].

You will need a computer/laptop and internet connection to access the meeting online.

We have sent you an email with the link to the meeting invite on [DATE]. Have you received the link?

IF YES, READ: Great, all you need to do is to click on that link and it will take you to our meeting on your scheduled day.

IF NO, READ: Thank you for letting me know. I will re-send it now. Please check your email and let me know if you received the email.

You are all set! Please sign in to your meeting 10 minutes early so we can get you set up.

Feel free to give us a call back at [phone number] in case you have any questions or are having difficulty accessing the link.

Have a good rest of your day!