Survey Name: IRS Appointment Line – Web

Item #: 1
Question type: Descriptive Text with FMG and IRS logos
Variable Name: WELCOME
Data Variable Name: NA
Variable Text: Header: **APPOINTMENT LINE FOLLOW UP SURVEY**

Welcome to the IRS Appointment Line Follow Up Survey. This follow-up study is voluntary and should only take around 5 minutes.

Fors Marsh Group (FMG), an independent research company, is conducting this survey on behalf of the IRS. FMG will not provide any identifying information to the IRS and will keep your identity private to the extent permitted by law.

You will be able to exit at any point and re-enter by using the link in your invitation email.

Survey Instructions: Before you begin, here are some instructions about how the survey works:

Click on the **NEXT** >> button to save your responses and continue to the next page.
Click on the **BACK** << button to view your responses on a previous page. You may change your answers to responses already entered. Do not use your browser's Back button. This may cause you to exit the survey.

Privacy Statement

The authority requesting the information is 5 USC 31. The primary purpose of asking for the information is to determine steps IRS can take to improve our service to you. The information may be disclosed as authorized by the routine uses published for the Privacy Act System of Records entitled Tres/IRS 00.01 Correspondence Files, including Stakeholder Partnership File, and Correspondence Control Files, as published in the Federal Register: December 10, 201 (Volume 66, Number 237)] [Notices] pages 63785-6. Providing the information is voluntary. Not answering some or all of the questions will not affect you.

Paperwork Reduction Act Statement

If you have any comments about the time used to complete the survey or ways to improve the survey, you may write to the IRS:
IRS Special Services Section,
1111 Constitution Avenue, NW,
SE:W:CAR:MP:T:M:S - Room 6129,
Washington, DC 2224

Value	Value Label
NA	There is no value

// Programming Note: Set MODE=2 //

Item #: 2
Question type: Single Select Grid
Web Variable Name: Q1A
Data Variable Name: See below
Variable Text: Reflecting on your overall experience beginning with your call to the IRS on [DATE] through today, including any interactions/contact with the IRS during this time, please rate your level of agreement with the following statements.

Web Variable Name	Web Variable Text	Data Variable Name	Data Variable Label
Q1A	This interaction increased my trust in the IRS.	q1A	Q1a: I am satisfied with the service I received from the IRS.
Q1B	I am satisfied with the service I received from the IRS.	q1B	Q1b: This interaction increased my trust in the IRS.

// Data Management Note: Values for Q1A from the raw Voxco data export should be assigned to Q1B and vice versa. //

Web Value	Web Value Label	Data Value	Data Value Label
1	STRONGLY DISAGREE	1	1: Strongly Disagree
2	DISAGREE	2	2: Disagree
3	NEITHER AGREE NOR DISAGREE	3	3: Neither Disagree nor Agree
4	AGREE	4	4: Agree
5	STRONGLY AGREE	5	5: Strongly Agree
99	REFUSAL – Not visible [For CATI sync]	88	88: No response

Item #: 3
Question Type: Open Ended Essay
Web Variable Name: Q1_2
Data Variable Name: q1_2o
Web Variable Text: Would you like to provide any additional comments or feedback on the ratings you provided?

Data Variable Label: Q1_2o. Any additional feedback on your scores? (open-ended field)

Item #: 4
Question type: Single Select Grid
Web Variable Name: Q1C
Data Variable Name: See below

Web Variable Text: Reflecting on your overall experience beginning with your call to the IRS on [DATE] through today, including any interactions/contact with the IRS during this time, please rate your level of agreement with the following statements.

Web Variable Name	Web Variable Text	Data Variable Name	Data Variable Label
Q1C	My need was addressed.	q1C	Q1c: My need was addressed.
Q1D	It was easy to complete what I needed to do.	q1D	Q1d: It was easy to complete what I needed to do.
Q1E	It took a reasonable amount of time to do what I needed to do.	q1E	Q1e: It took a reasonable amount of time to do what I needed to do.
Q1F	I was treated fairly.	q1F	Q1f: I was treated fairly.
Q1G	The employees I interacted with were helpful.	q1G	Q1g: The employees I interacted with were helpful.

Web Value	Web Value Label	Data Value	Data Value Label
1	STRONGLY DISAGREE	1	1: Strongly Disagree
2	DISAGREE	2	2: Disagree
3	NEITHER AGREE NOR DISAGREE	3	3: Neither Disagree nor Agree
4	AGREE	4	4: Agree
5	STRONGLY AGREE	5	5: Strongly Agree
99	REFUSAL – Not visible [For CATI sync]	88	88: No response

Item #: 5
Question type: Single Select
Web Variable Name: Q2
Data Variable Label:
Web Variable Text: What was the main tax issue that led you to contact the IRS on [DATE]?

Data Variable Label: Q2. What was the main tax issue that led you to contact the IRS on [CALL MONTH][CALL DAY]?

Web Value	Web 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	A 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
11	Tax return or refund	11	11: Tax return or refund

10	Other, please describe: [Open Text]	10	10: Other, please describe [q2o]
99	Refusal – Not visible [For CATI sync]	88	88: No response

Item #: 6
Question type: Single Select
Web Variable Name: Q3
Data Variable Name: q3
Web Variable Text: Were you provided the service you needed during the phone call on [DATE] to resolve your main issue?

Data Variable Label: Q3. Were you provided the service you needed during the phone call on [CALL MONTH][CALL DAY] to resolve your main issue?

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

Item #: 7
Question type: Single Select
Web Variable Name: Q4
Data Variable Name: q4
Web Variable Text: During your call to the IRS on [DATE], if you scheduled an appointment for service at an IRS walk-in office, did you go to the appointment?

Data Variable Label: Q4. During your call to the IRS on [CALL MONTH][CALL DAY} if you scheduled an appointment for service at an IRS walk-in office, did you go to the appointment?

// HARD PROMPT: A response is required for this question. //

Web Value	Web Value Label	Data Value	Data Value Label
1	I did not schedule an appointment	1	1: I did not schedule an appointment
2	Yes	2	2: Yes
3	No	3	3: No

// IF Q4 = 1 Branch To Q8 //
// IF Q4 = 3 Branch To Q6 //
// IF Q4 Is Empty Branch To Q8 //

//ASK IF Q4=2//

Item #: 8
Question type: Single Select
Web Variable Name: Q5

Data Variable Name: q5
Web Variable Text: Did the information you received during your appointment eliminate the need for further contact with the IRS for your tax issue?

Data Variable Label: Q5. Did the information you received during your appointment eliminate the need for further contact with the IRS for your tax issue?

Web Value	Web Value Label	Data Value	Data Value Label
1	Yes	1	1: Yes
2	No	2	2: No
99	Refusal – Not visible [For CATI sync]	88	88: No answer

// IF Q5 = 1 Branch To Q8 //
// IF Q5 = 2 Branch To Q8 //
// IF Q5 = 99/88 Branch To Q8 //
// IF Q5 Is Empty Branch To Q8//

//ASK IF Q4=3//

Item #: 9
Question type: Single Select
Web Variable Name: Q6
Data Variable Name: q6
Web Variable Text: Please select the primary reason you did not attend the appointment.

Data Variable Label: Q6. Please select the primary reason you did not attend the appointment.

Web Value	Web Value Label	Data Value	Data Value Label
1	Tax issue was resolved prior to the appointment	1	1: Tax issue was resolved prior to the appointment
2	Something came up that prevented you from going to the appointment	2	2: Something came up that prevented you from going to the appointment
3	You forgot about the appointment	3	3: You forgot about the appointment
4	The IRS office cancelled your appointment	4	4: The IRS office cancelled your appointment
99	Refusal – Not visible [Open Text for CATI sync]	88	88: No answer

// IF Q6 = 2 Branch To Q8 //
// IF Q6 = 3 Branch To Q8 //
// IF Q6 = 4 Branch To Q8 //
// IF Q6 = 99/88 Branch To Q8 //
// IF Q6 Is Empty Branch To Q8 //

//ASK IF Q6=1//

Item #: 10
Question type: Single Select
Web Variable Name: Q7
Data Variable Name: q7
Web Variable Text: How did you resolve your tax issue?

Data Variable Label: Q7. How did you resolve your tax issue?

Web Value	Web Value Label	Data Value	Data Value Label
1	Visited an IRS Walk-in office before the scheduled appointment	1	1: Visited an IRS Walk-in office before the scheduled appointment
2	Called the IRS Toll Free number	2	2: Called the IRS Toll Free number
3	Mailed the IRS	3	3: Mailed the IRS
4	Visited the IRS.gov website	4	4: Visited the IRS.gov website
5	Got advice from a Tax Professional		5: Got advice from a Tax Professional
6	Got advice from a family member, friend, or coworker		6: Got advice from a family member, friend, or coworker
7	Other, please specify: [Open Text]		7: Other, please specify: [q7o]
99	Refusal – Not visible [Open Text for CATI sync]	88	88: No answer

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// Programming Note: Set MODE=2 //

Item #: 11
Question type: Single Select
Web Variable Name: Q8
Data Variable Name: q8
Web Variable Text: Is the main reason for contacting the IRS on [DATE] currently resolved?

Data Variable Label: Q8. Is the main reason for contacting the IRS on [CALL MONTH][CALL DAY] currently resolved?

Web Value	Web Value Label	Data Value	Data Value Label
1	Yes	1	1: Yes
2	No	2	2: No
99	Refusal – Not visible [Open Text for CATI sync]	88	88: No answer

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Item #: 32
Question type: Descriptive Text
Web Variable Name: NA
Web Variable Text: That completes the survey. Thank you very much for participating.

Value	Value Label
Result = 1	Completed – INT99 = CO