

Recruitment Script for the Point of Service Interactive Voice Response (IVR)  
Survey (read by IRS assistor):

This call has been randomly selected for an private IRS improvement survey. It will take under eight minutes. Would you like to participate in the survey? IF YES, READ: Thank you. Please wait while I transfer you. (The IRS assistor will then transfer the taxpayer to the IVR.)

Appointment Line IVR Survey (Point of Service)

Thank you for participating in this voluntary survey; it should take about 8 minutes. Your input will assist the IRS to improve its service for callers like you. This survey is being conducted by [insert contractor name], an independent, third-party organization. All answers will be kept private to the extent allowed by law. There are no penalties for not answering some or all of the survey questions.

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.

I am going to ask you several questions about your experiences during this call. Please answer the next questions with the following scale:

If you were very satisfied, press 5

If you were somewhat satisfied, press 4

For neither satisfied nor dissatisfied, press 3

If you were somewhat dissatisfied, press 2

If you were very dissatisfied, press 1

1. Everything considered, please rate your overall satisfaction with the service you received during the call today.

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.

2. Rate your satisfaction with the courtesy of the representative who handled your call.
3. Rate your satisfaction with the professionalism of the representative who handled your call.
4. Rate your satisfaction with the representative's willingness to help you with your issue.
5. Rate your satisfaction with the knowledge of the representative.

The next three questions relate to the IRS's automated answering system,

6. Rate your satisfaction with the ease of understanding the automated answering system menu.
7. Rate your satisfaction with how well the menu choices fit your issue.
8. Rate your satisfaction with how well the automated system helped you find the right person.

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.

9. Rate your satisfaction with the length of time it took to complete your call from when you first reached a representative
10. When you called today, how long did you wait on the phone before speaking to a live representative?
  - Less than 3 minutes
  - 3 to 10 minutes
  - 11 to 30 minutes
  - 31 minutes or more
11. In total, how many minutes did you spend on this call including any time on hold, but not including the time spent answering this survey?
  - Less than 10 minutes
  - 10 to 20 minutes
  - 21 to 30 minutes
  - 31 minutes or more
12. Was the length of the call...?
  - Too long
  - Too short
  - About right

The next few questions have to do with your tax issue, service, and appointment scheduling.

13. Did you call today to make an appointment for service?
  - Yes
  - No
14. How did you find out that an appointment for service was required?
  - Friend, family member or co-worker
  - Found out at IRS office
  - Tax preparation company, accountant or tax professional
  - Volunteer tax preparation clinic
  - News media (e.g., newspaper, radio, television, Internet news site)
  - Social media

- IRS phone representative
- IRS website
- Other, please explain\_\_\_\_\_

15. What service need did you call about today?

- Transcript request
- Make a payment
- Account related issue
- Obtain a tax form or publication
- Explain a notice or letter from the IRS
- A general tax law question
- Obtain a tax identification number
- Identity theft related issue
- Sailing permit
- Other, please explain

16. Did you use any of the following methods to resolve your tax issue before you called today?

- Visit the website (IRS.gov)
- Called the IRS 800 phone number (please do not include the call to make an appointment)
- Email the IRS
- Visit an IRS office
- Sent mail to the IRS

17. Did the representative offer to provide service over the phone today rather than making an appointment for face to face customer service?

- Yes
- No

18. Were you willing to obtain service over the phone today rather than making an appointment for face to face customer service?

- Yes (if no, go to 20)
- No (if no, go to 19)

19. Please explain why you were not willing to obtain service over the phone rather than making an appointment.

20. Did the IRS representative answer all of your questions on the call today?

- Yes
- No (if no, please explain what was not provided)

21. Will the information you received today eliminate the need for further contact with the IRS for your reason for calling?

- Yes
- No

22. Did you make an appointment for assistance on the call today?

- Yes (if yes, go to 22a)
    - o 22a. If you made an appointment, did you take the first available time and date slot?
      - Yes
      - No
  - No (if no, go to 29)
23. During the appointment process, were you told what to bring with you to obtain service?
- Yes
  - No
24. Rate your satisfaction with the process of scheduling an appointment.
25. Rate your satisfaction with the time between today's call and the actual date the appointment is scheduled on.
26. When you contacted the IRS to make an appointment, how long did you expect to wait between requesting the appointment and the actual appointment?
- Same day
  - 1 week
  - 2 weeks
  - 3 weeks
  - 4 or more weeks
27. How long did you actually have to wait between requesting the appointment and the appointment?
- Same day
  - 1 week
  - 2 weeks
  - 3 weeks
  - 4 or more weeks
28. Please describe any suggestions for improving the appointment process.
29. What category described your current age?
- 18 to 24 years
  - 25 to 34 years
  - 35 to 44 years
  - 45 to 54 years
  - 55 to 64 years
  - 65 to 74 years
  - 75 to 84 years
  - 85 years and over
30. What category described your annual household income?
- Less than \$15,000
  - \$15,000 but less than \$25,000

- \$25,000 but less than \$35,000
- \$35,000 but less than \$50,000
- \$50,000 but less than \$75,000
- \$75,000 but less than \$100,000
- \$100,000 or more

31. How often do you access the Internet?

- Several times a day or more
- Once a day
- Several times a week
- Once a week
- Less than once a week
- Never

32. Do you live in...?

- An urban area
- A suburban area
- A rural area

33. What is your ZIP Code?

34. Overall, how well did the IRS meet your expectations during your call today? (5 Much better than expected, 4 Better than expected, 3 As expected, 2 Worse than expected, 1 Much worse than expected)

35. The IRS would like to follow up with you in a month or so to assess your experience, satisfaction, and issue resolution with the Appointment line, process, and service. Would you be willing for [insert contractor awarded] to contact you in order to participate in future research and surveys?

- Yes. 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.
  - o Please enter your phone number.
  - o Are you willing to be contacted via email for future research and surveys?
    - If yes, please state and spell your email address. Press any key when you are finished.
  - o Please state and spell your first and last name.
- No

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-

*Privacy Statement*

*The authority requesting the information is 5 USC 301. 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, Treas/IRS 00.001 Correspondence Files, including Stakeholder Partnership File, and Correspondence Control Files, as published in the Federal Register: December 10, 2001 (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.*

1432. 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 to, press 1. Otherwise you may hang up to complete this call.

Please write to: Internal Revenue Service, IRS Special Services Section, 1111 Constitution Avenue, NW, SE:W:CAR:MP:T:M:S - Room 6129, Washington, DC 20224  
Thank you