

Taxpayer Advocacy Panel

Taxpayer Assistance Centers

Customer Service From Both Sides Of The Counter



*A research report on customer service as viewed by
taxpayers and TAC employees*



November 30, 2007



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November 30, 2007

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Dear Beth,

It is with great pleasure that I submit to you the Taxpayer Advocacy Panel (TAP) report on customer satisfaction with the Taxpayer Assistance Center (TAC) experience and TAC employee satisfaction as it relates to customer service. This report, "Customer Service From Both Sides of the Counter," was prepared by members of TAP's Taxpayer Assistance Center Issue Committee.

In January 2006, Estelle Tunley, then Director of Field Assistance, tasked TAP with assessing TAC customer service as viewed by taxpayers and TAC employees. This was accomplished by conducting surveys with each group and then analyzing the survey results.

Although our surveys and this report do not address the question of whether there should be more or fewer TACs, it is clear that TACs play a vital role in the range of options needed for helping taxpayers. As the Taxpayer Assistance Blueprint points out: "Taxpayers prefer assisted services, such as those available through telephones and Taxpayer Assistance Centers, most often for more complex interactive tasks like responding to a notice."

We appreciate the opportunity to look at customer satisfaction from both the taxpayer and the Taxpayer Resolution Representative (TRR) perspective. They both play important roles in understanding and improving customer satisfaction. The TRRs are on the front line, and are in an excellent position to understand issues and identify solutions.

It is our sincere hope that the recommendations outlined in this report will be strongly considered and that Field Assistance will continue to have an active partnership with TAP. We offer TAP's assistance to work with and advise Field Assistance management regarding implementation of these recommendations, as well as other efforts to improve customer service in the TACs.

Respectfully Submitted,

A handwritten signature in cursive script that reads "Jerry Fireman".

Jerry Fireman, Chair
Taxpayer Assistance Center Issue Committee

The Taxpayer Assistance Center Issue Committee of the Taxpayer Advocacy Panel gratefully dedicates this report to the Taxpayer Assistance Center front-line employees and managers who strive daily to provide superior service to taxpayers, as reflected in the Customer and Employee Survey results.

Acknowledgments

The Taxpayer Assistance Center (TAC) Issue Committee of the Taxpayer Advocacy Panel (TAP) acknowledges the help and cooperation it received from the following individuals and groups in conducting the surveys and writing this report:

First, to the following TAP members who administered the Customer Surveys at TAC offices throughout the United States:

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Jerry Fireman	Lovella Richardson	Bruce Zgoda
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Second, to the managers and staffs of TAC offices throughout the country, without whose help the Customer and Employee Surveys could not have been completed by the TAC Committee.

Third, to the IRS management and staff who provided both technical support and encouragement during this two-year project, including: Estelle Tunley, Director, Field Assistance; Shirley Washington and Michelle Jones, Field Assistance Analysts; Bernie Coston, TAP Director; Dave Coffman, TAP Analyst; Judi Nicholas, Manager, Seattle TAP office; Tom Beers, Director, TAS Research; Carol Hatch and Jeff Wilson, TAS Research Analysts; Patrick Jackson, TAS Communication Analyst, and Marla Ofilas, Management Assistant. Without their assistance, the TAC Committee could not have comprehended, understood, and reported the data resulting from the Customer and Employee Surveys.

The TAC Committee members thank all of you for your hard work and dedication.

Jerry Fireman, Chair
Bruce Zgoda, Vice Chair
Robert B. Haines
Jerry Melchior
Wayne Whitehead
Doug Wilhelm

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Introduction

The Taxpayer Assistance Center (TAC)¹ Issue Committee was formed in January 2006 at the Taxpayer Advocacy Panel (TAP)² annual meeting in Washington, D.C. Estelle Tunley, then Field Assistance Director, tasked TAP with assessing TAC customer service.

TAC Committee members saw the need for two surveys: one for TAC customers and one for TAC employees. The customers would be asked about the services they received and the employees would be asked for their views on the services they provide, including any impediments to providing those services. Committee members wanted to find out if there was a correlation between the two perspectives.

At a meeting with TAP representatives in Washington, D.C., in August 2007, Acting Commissioner Kevin Brown indicated that the TAC Issue Committee surveys will help the IRS make better business decisions regarding TACs.

At that same meeting, National Taxpayer Advocate (NTA) Nina Olson made very favorable comments about the TAC Issue Committee's work, especially the TAC surveys. She mentioned that this is one of the most important initiatives exploring the demand side of IRS services, rather than the supply side. She also stated that the report from the TAC Committee "will be an extraordinary contribution to tax administration."

¹ Taxpayer Assistance Centers (TACs) provide walk-in tax assistance for taxpayers. The TACs are managed by the Field Assistance organization within the IRS Wage and Investment division.

² The Taxpayer Advocacy Panel (TAP) is composed of citizen volunteers, appointed by the Secretary of the Treasury, who serve three-year terms in an advisory capacity to the Internal Revenue Service.

Executive Summary

The survey results presented in this report provide “grassroots” data, obtained throughout the United States by unpaid TAP volunteers. It reflects not only the opinions of the TACs’ customers, but also the perspective of TAC employees who serve them. As such, it will provide the Internal Revenue Service (IRS) leadership with substantive data and recommendations that “will help the IRS make better business decisions regarding TACs.”

Several committee members field-tested the TAC Committee-developed Customer Survey, surveying everyone who entered a TAC for any reason. Subsequently, 28 TAP volunteers administered the Customer Survey in select TAC locations across the nation. The Customer Survey was administered in two phases: during and after the 2007 filing season.

The Customer Survey captured feedback from more than 1,100 taxpayers. Key findings include:

- Primary reasons for visiting a TAC were to get an answer to a tax question (especially during filing season), obtain tax forms/publications/instructions, and to resolve an IRS notice or letter-related issue (post-filing season).
- Individual (non-business) questions comprised 72% of the “reasons for visiting a TAC,” while business questions, many involving Highway Use Tax, comprised 11% of the “reasons for visiting a TAC.” Seven percent indicated that their visit to the TAC involved both individual and business questions.
- TAC usage was consistent across age categories:
 - 25-34 years old - 18%
 - 35-44 years old - 20%
 - 45-54 years old - 22%
 - 55-64 years old - 18%
 (Note: This might suggest that the need for TACs will not diminish as the “computer generation” ages.)
- The primary languages of TAC customers were:
 - English - 83%
 - Spanish - 13%
 - Other – 4%
- Income levels of TAC customers:
 - <\$20,000 - 33%
 - \$20,000 - \$34,999 - 23%
 - \$35,000 - \$49,999 - 17%
 - >\$50,000 – 27%

- Customers went to a TAC instead of using other services because (1) they had previously used the walk-in service, (2) the location was close to home, and/or (3) they wanted to speak to someone face-to-face.
- Fifty-nine percent of Customer Survey respondents indicated they had Internet access at home, although it was not ascertained whether they actually used the Internet or that they were computer literate.
- Only 38% indicated they would use a paid preparer. (The percentage of survey respondents stating that they used a paid preparer was significantly less than the 61% of tax year 2005 filers who used a paid preparer).
- Sixty-one percent of Customer Survey respondents indicated that TAC wait time was less than expected.

The Employee Survey was administered on-line after the 2007 filing season and had a 42% participation rate among the Taxpayer Resolution Representatives (TRRs), the front-line TAC employees who were eligible to take the survey. Considering the Survey participation rate, their voluminous comments and responses, it was clear that TRRs were sincerely interested in providing superior service to their customers.

Survey questions also asked if employees felt they were properly trained, equipped and managed to provide quality service to customers. Responses to these questions varied.

A total of 610 employees participated in the Employee Survey. Key findings include:

- Fifty-seven percent of Employee Survey respondents were satisfied or very satisfied with the level of service they were able to provide TAC customers. Respondents indicated that the level of service could be improved by (1) more privacy in TAC offices, (2) quicker problem/issue resolution, (3) increased staffing, (4) offering expanded services, and (5) shorter wait times.
- Thirty-seven percent of respondents indicated that answering tax questions was among the services that are most difficult for them to provide to customers, while 32% cited the inability to accept cash payments as an impediment to providing customer service.
- Managerial support was seen as good (or better) by 61% of respondents.
- Although 62% of respondents indicated that the IRS provides all of the equipment needed to provide quality service to customers, the need for more copiers was cited repeatedly in their comments.
- Forty-two percent of respondents indicated that IRS policies and procedures were adequate or better.

- Training was another area where opinions were divided. To the question, “Does the training you receive allow you to provide quality service to customers visiting your TAC?”, the responses were:

Yes	46%
No	40%
Not Sure	13%

(Note: Many respondents (246) provided input on areas of additional training they believe are needed to improve service provided to TAC customers.)

The committee has outlined fourteen recommendations designed to increase the current TAC customer satisfaction rating of 78%. Recommendations cover policy and procedures, training, resources, scope of services, and facilities. While some recommendations can be implemented quickly and at nominal costs; e.g. fix the system to make basic supplies available to TRRs, others could take longer and involve significant costs; e.g. accelerating the TAC office remodeling process in order to increase customer privacy.

A brief summary of the committee’s recommendations follows:

1. Review and revise current policies and procedures to avoid impeding delivery of services, such as answering tax law/account questions, assisting with ITIN³ applications, etc.
2. Improve procedures so that all TACs accept cash payments.
3. Work with IRS Accounts Management to ensure instant phone support for TRRs.
4. Improve the quality and timeliness of training for all staff, especially the longest-term employees, who expressed the greatest need for additional training.
5. Make office supplies readily available and regularly monitor needs for additional equipment such as computers, copiers, and printers.
6. Provide timely updates for the PMG⁴.
7. Provide additional Tax Resolution Representative (TRR)⁵ staffing during peak periods.

³ An Individual Taxpayer Identification Number (ITIN) is a tax processing number issued by the Internal Revenue Service. IRS issues ITINs to individuals who are required to have a U. S. taxpayer identification number but do not have, and are not eligible to obtain, a Social Security Number from the Social Security Administration.

⁴ The Publication Method Guide (PMG) is a reference tool used by TRRs to answer tax law questions. The PMG contains a series of questions that the TRR asks the customer. Based on the customer’s responses, the TRR uses the PMG to determine a technically correct answer. The TRR then provides the answer, referring to the appropriate IRS publication. Use of the PMG is mandatory for all TRRs answering tax law questions.

⁵ Effective July 2007, the title of Tax Resolution Representative (TRR) was changed to Individual Tax Advisory Specialist (ITAS).

8. Study why the employee satisfaction level regarding the service they provided to customers was low (57%) as compared to the customer satisfaction rate of 78%.
9. Appropriate IRS officials need to better understand TAC customers' computer skills and willingness to use the Internet.
10. Expand efforts to inform customers of TAC's services.
11. Evaluate and adjust the scope of current services offered. Suggested scope enhancements include: provide transcripts for all taxpayers, schedule tax preparation appointments by phone, and adjust scope to accommodate demographic/economic patterns and events that affect taxpayers, such as disasters.
12. Improve the experience that TAC customers get while waiting for service. This could include a silent video explaining the Q-MATIC^{®6} system and promoting other methods of receiving IRS services.
13. Accelerate the office remodeling process at TACs to increase customer privacy.
14. Conduct focus groups to obtain suggestions for improvements directly from the TRRs.

Although outside the scope of our assigned task, we encourage Field Assistance management to develop detailed implementation plans and timelines for each recommendation. Once the recommendations have been implemented, these surveys should be administered again to see if customer and employee satisfaction rates increase and to identify additional opportunities to improve customer satisfaction.

⁶ Field Assistance uses Q-MATIC[®] Traffic Management System to support customer service in the TAC. All 401 TAC locations are supported by a version of Q-MATIC[®] software that is a "full" (225), hybrid (6) or lite (170) version. "Full" Q-MATIC[®] features the wait time measurement system, while the hybrid and lite do not calculate wait time.

Survey Methodology and Limitations

Background

The TAC Issue Committee, working in conjunction with IRS Field Assistance, decided to conduct a study to learn more about taxpayers' customer service experiences when visiting TACs. The committee wanted to learn about TAC customer service both from those receiving the service and those providing the service, so customers (taxpayers) and employees were included in the study. The Taxpayer Advocate Service (TAS) Research and Analysis staff provided support for the projects, helping with study and questionnaire design, data collection and analysis, and summarization of findings.

Methodology -- Customer Survey

Obtaining input from taxpayers about their customer service experience was the focus of the first aspect of this study. The TAC Issue Committee and IRS Field Assistance management decided the best way to obtain customer feedback was to administer an in-person survey. TAP members volunteered to visit IRS TACs to survey taxpayers who visited TACs for any reason.

The TAP volunteers worked with IRS Field Assistance to schedule office visits on prearranged days in February, March, and May 2007, distributing surveys to taxpayers and collecting the completed surveys. Volunteers were instructed to survey all customers who went to the TACs during the time that the volunteer was in the office. Each volunteer was asked to record the number of customers declining to participate. Refusal counts were obtained for all but three office visits. Each volunteer was instructed to obtain 20 completed surveys and return them to the TAP office in Seattle.⁷ TAC employees were instructed to encourage taxpayers to take the TAP panel survey.⁸ Volunteers were given extensive orientation training by telephone on how to approach taxpayers, contact as many departing taxpayers as possible and to refrain from providing any interpretation to the survey questions. Survey respondents were provided with materials and space to take the survey without interruptions and were given a small thank-you token. The Seattle TAP office coded the surveys and entered the responses into an Excel spreadsheet. This study obtained customer feedback in 30 TACs and from more than 1,100 taxpayers visiting IRS offices. It is likely that the survey results are reflective of the general TAC population; however, a variety of limitations prevent the assurance of complete statistical reliability. One of the requirements for the statistical validity of a sample is that the all members of the population had an equal chance of being selected. In this study, resource limitations precluded the survey of some TAC sites. It might be possible to compensate for this limitation if tax and demographic characteristics of the sites surveyed could be compared to the tax and demographic characteristics of sites not participating in the survey. However, data are not maintained on such characteristics for any of the TAC sites, so a post-survey comparison is not possible. Specific limitations to the survey findings are discussed in the following section.

⁷ Less than 25 surveys were received from some offices.

⁸ The normal TAC customer satisfaction survey was suspended on days when the TAP panel customer survey was being administered.

Limitations – Customer Survey

Because the study design required a volunteer to visit a nearby TAC, sites were not randomly selected for participation. More larger sites were visited and represented a much larger portion of our study than they do in the general population of TAC offices.⁹ For example, during the filing season period, survey sites represented 4% of the total volume of taxpayers visiting small TAC sites and 12% of the total volume of taxpayers visiting large TAC sites. Similarly, survey sites for the post-filing season included 5% of the total volume of taxpayers visiting small TAC sites and 13% of the total volume of taxpayers visiting large TAC sites.¹⁰ This shows that the larger sites surveyed accounted for a larger proportion of the large-site taxpayers than when compared to the surveyed small sites. However, because large sites also have a larger walk-in taxpayer volume than small sites, each survey has virtually equivalent weights.

Another limitation is that TAC data indicate that services may not be sought equally in large and small sites. This is particularly noteworthy in the number of TAC contacts for forms, where forms services provided by small sites accounted for more than 77 % of the total TAC forms service volume.¹¹

Some additional limitations of the study include the fact that offices were visited only one or two days during the filing season and/or post-filing season. Results from such a small number of days may not be representative of the entire filing season or post-filing season. Further, there is a potential for bias in the study results since the office visits were prearranged. Mondays and Fridays were generally excluded from the survey process. IRS workers knew which days taxpayers were being surveyed about the customer service they received in the TAC. Ideally, workers would not know when surveys were being administered. This would avoid the possibility of workers improving the quality of service for the survey administration period in an attempt to increase the number of positive responses and thus improve the feedback on their performance.

Lastly, another potential concern with the Customer Survey is that it had the potential to become a convenience sample if volunteers did not ask all taxpayers receiving services to participate. However, the reported overall refusal rate from the survey was less than 20%.¹²

⁹ Large and small TAC site determinations were made on the basis of total walk-in volume, with large sites being those sites serving more than the average number of walk-in taxpayers served by all sites.

¹⁰ There are more small TAC sites than large TAC sites and small TAC sites represented only 41% of the sampled sites. Therefore, the surveyed small sites represent a smaller volume of the taxpayers served by small sites, when compared to the surveyed large sites.

¹¹ W&I Field Assistance BPMS Report, FY 2005.

¹² Refusal data was not collected at three sites.

Methodology --Employee Survey

The second aspect of this study collected information from employees about the services they provide to taxpayers. TAP members, TAS Research, and IRS Field Assistance decided the best way to conduct this employee study was to administer an anonymous survey via the IRS Intranet. The Director of IRS Field Assistance sent an e-mail to all Field Assistance employees asking for their assistance with this study. The e-mail stressed that only TRRs should participate. The e-mail was sent to more than 2,100 employees with more than 1,461 of those receiving the e-mail working in jobs as TRRs.

Originally, the survey was to be administered June 25 - July 6, 2007. However, because of low response rates, the survey period was extended through July 13, 2007. A second e-mail was sent to Field Assistance Employees thanking those who had completed the survey and encouraging those TRRs who had not participated to do so. Field Assistance analysts also contacted offices and promoted study participation. Initially, 432 employees completed surveys. The number of participants grew to 610 of 1,461, or 42% of eligible TRRs, by the end of the survey administration period.

Limitations – Employee Survey

Since the survey link was sent to all Field Assistance employees, there is the possibility that surveys were completed by employees with little knowledge of the customer service experience for taxpayers visiting a TAC. It is unlikely that this occurred often, based on the directions in the e-mails accompanying the survey link and a review of survey responses. Another potential bias introduced into the study was the fact that some offices were contacted and encouraged to participate in the study more than other offices.

Another limitation is the number of employees who did not participate in the study. Of the eligible employees, almost 60 % did not complete the survey. These employees could have very different opinions than those who completed the survey. The survey timing may have negatively affected participation rates since one week of survey administration included the July 4th holiday and employees may have been on vacation during the data collection period, thus giving them less time to sign-on to the Survey Manager site and complete the questionnaire.

Summary of Customer Survey Results

Respondents to the survey revealed the three main reasons why people use a TAC:

1. To get an answer to a tax question,
2. To obtain forms and publications, and
3. To resolve a notice or letter issue.

Outside of tax season, the top response was getting a notice or letter resolved.

It was also discovered why people use a TAC instead of other IRS services, some of which may be more convenient for them; e.g., the Internet:

1. Prior use of the walk-in service,
2. Close to home, and
3. Wanted to speak to someone face-to-face.

Overall, 33% of respondents reported needing some service that was not available. The top three deficiencies noted were:

1. Not being able to get tax preparation help,
2. Not all forms and publications were available, and
3. Not able to obtain a copy of a prior year return.

More than 75% of TAC visitors surveyed were satisfied with their overall experience. Satisfaction indicators are as follows:

Overall satisfaction with service – 78%
Overall dissatisfaction with service – 16%

Question was answered or requested service was provided:

Overall satisfaction rate – 83%
Overall dissatisfaction rate – 11%

Walk-in hours were convenient:

Overall satisfaction rate – 86%
Overall dissatisfaction rate – 7%

Office location was good:

Overall satisfaction rate – 82%
Overall dissatisfaction rate – 9%

Customer Survey respondents indicated the top four reasons they were satisfied with their visit:

1. Wait time was less than expected,
2. Employee professionalism,
3. Service requested was available, and
4. Customer understood what the employee had told them.

On the other hand, Customer Survey respondents indicated the two top items that could have improved their visit:

1. Shorter wait time, and
2. Ability to resolve the issue/problem.

The vast majority of the Customer Survey respondents were there to deal with individual issues:¹³

1. Individual – 72%
2. Business – 11%
3. Both – 7%
4. Other – 11%

A plurality of respondents will have their returns prepared by a paid preparer:

1. Paid preparer – 38%
2. Self prepared – 32%
3. Non-paid preparation assistance – 21%

The Customer Survey showed that TAC users span the 25 – 64 year old age groups, with the percentage of respondents almost the same in all age groups:

- 25 – 34 - 18%
- 35 – 44 - 20%
- 45 – 54 - 22%
- 55 – 64 - 18%

More than 50 % of TAC customers surveyed had an annual income of less than \$35,000:

- <\$20,000 – 33%
- \$20,000-\$34,999 – 23%
- \$35,000-\$49,000 – 17%

¹³ Discrepancy is due to rounding.

English is the primary language of TAC customers surveyed:

- English – 83%
- Spanish – 13%
- Other – 4%

Almost 60% of those surveyed indicated they had Internet access at home¹⁴:

- Yes – 59%
- No – 40%

¹⁴ The survey did not ask if respondents had computer skills or actually utilized the Internet.

Summary of Customer Survey Observations/Concerns

Based on the data, which can be found in Appendix, the committee identified several areas where additional focus by Field Assistance management may be needed.

1. After reviewing the answers to the primary reasons people visit a TAC, the committee members had these questions:

Is there a way to get forms and publications somewhere besides the TACs and are customers aware of these sources?

Is there a direct correlation between a taxpayer's expectations to get an answer to a tax question and the employee's desire to have more knowledge/education in the area of tax law?

Have taxpayers attempted to resolve their notice or letter via toll-free phone calls prior to coming into a TAC?

2. The reasons listed for using a TAC instead of other IRS services were (1) "Used the walk-in service before," (2) "Location close to home," and (3) "Wanted to talk face-to-face with an IRS representative."

Should the IRS consider enhancing educating customers about alternative services available?

Do customers receive quicker service in the TACs than by calling the toll-free line? Are there any metrics available to answer this question?

3. TAC customers who indicated some service was not available in TACs may be helped by Field Assistance addressing the following questions:

Are customers thoroughly educated on the services offered in a TAC?

Are customers aware of the need to make appointments for tax preparation?

Does each TAC office provide a list of nearby VITA sites?

4. The answer as to why there are unsatisfied customers (16%) may be found by addressing these two questions:

Were they looking for services not offered?

Are customers aware of the need to convert cash to money orders? (For many dissatisfied customers, "making a payment" is a significant area of concern.)

5. Although overall satisfaction levels are acceptable, some steps can be taken to improve those numbers by answering the following:

What is the average wait time in a TAC – during filing and non-filing periods?

Are customers informed about potential wait times and alternatives? (While customers wait, there could be helpful tax topics available on a monitor, reader boards, etc.)

Have customers been educated about “why” a problem cannot be resolved at a particular time? Is there research available that explains what problems aren’t getting resolved, and why?

While 38% of respondents indicated their 2006 tax return would be done by a paid preparer, 32% said they would prepare their own returns, and 21% had non-paid assistance with their tax returns. This “paid preparer percentage” is significantly lower than the 61% of Tax Year 2005 individual income tax return filers who used a paid preparer.

Those who checked “paid preparer” during the post-filing season period also checked that they needed:

- Assistance with a notice or letter issue – 30%
- An answer to a tax question – 28%
- To make a payment – 18%

Overall, (filing season/post-filing season) the percentages for these responses were:

- Needed an answer to a tax question – 26%
- Needed assistance with a notice or letter issue – 25%
- Needed to get a form – 18%
- Needed to make a payment – 16%

TAC usage is not confined to any particular age group, with those from 25 to 64 years old using the services at about the same percentage rate. This may suggest that as the “computer generation” ages, these customers may still have a need for face-to-face contact to address tax issues.

Summary of Employee Survey Results

Providing service to the U.S. taxpayer is the focus of the 2,000-plus Field Assistance employees. Service is considered so important, it was made part of the organizational name – Internal Revenue Service. This particular survey evaluates customer service from the TRRs’ perspective.

When Employee Survey participants were asked, “Overall, how satisfied are you with the level of service you are able to provide to TAC customers?,” they responded as follows:

- Very Satisfied – 12%
- Satisfied – 44%
- Neutral – 16%
- Dissatisfied – 19%
- Very dissatisfied – 5%

TRRs were asked to rank the “most difficult” services from a list 17 specific activities plus an “other” category. The following activities were listed as the six most difficult:

1. Answering tax law questions – 37%
2. Accepting cash payments – 32 %
3. Completing ITIN applications – 25%
4. Answering account questions – 22%
5. Answering procedural questions – 22%
6. Processing requests for prior year return information – 14%

The Employee Survey asked TRRs to rate how the IRS’s managerial support, policies and procedures, current staffing levels, equipment, reference materials, and training helped them to perform their jobs at the TACs. TRRs were asked to rate each category using the following rankings: Excellent, Very Good, Good, Adequate, Poor, Very Poor, or Not Sure.

With respect to Managerial Support:

- Excellent – 19%
- Very Good – 24%
- Good – 19%
- Adequate – 17%
- Poor – 10%
- Very Poor – 10%
- Not Sure – 1%

With respect to Policies and Procedures:

- Excellent – 2%
- Very Good – 13%
- Good – 27%
- Adequate – 26%
- Poor – 21%
- Very Poor – 10%
- Not Sure - <1%

TRRs were asked which services were helped or hindered by current policies and procedures. The following were identified as helped most by current policies and procedures:

- Answering refund inquiries – 63%
- Accepting non-cash payments – 63%
- Providing tax forms/instructions/publications – 62%
- Updating taxpayer addresses – 57%
- Establishing payment terms/agreements – 53%

The following were identified as being most hindered:

- Answering tax law questions – 36%
- Accepting cash payments – 34%
- TDS¹⁵ – 23%
- Answering procedural questions – 22%
- Assisting with completing ITIN applications – 22%
- Processing applications – 22%

With respect to Current Staffing Levels helping TRRs to perform their duties, respondents gave the following ratings:

- Excellent – 4%
- Very Good – 11%
- Good – 20%
- Adequate – 26%
- Poor – 22%
- Very Poor – 17%
- Not Sure – <1%

¹⁵ Tax account information is provided to taxpayers via the Transcript Delivery System (TDS).

With respect to helpfulness of Equipment, TRRs responded:

- Excellent – 5%
- Very Good – 19%
- Good – 26%
- Adequate – 30%
- Poor – 14%
- Very Poor – 7%
- Not Sure – 0%

When TRRs were also asked if the IRS supplied all of the equipment they needed to provide quality service, they responded as follows:

- Yes – 63%
- No – 29%
- Not Sure – 8%

One hundred seventy-three TRRs responded “No” to this question. When asked what kind of equipment they needed but did not have, they responded as follows:

- Laptop personal computer – 7%
- Desktop personal computer – 20%
- Printer – 28%
- Fax Machine – 8%
- Furniture – 39%
- Other general office supplies – 51%
- Other (not specified) – 30%

With respect to Reference Materials, the following ratings of existing reference materials were given by respondents:

- Excellent – 5%
- Very Good – 22%
- Good – 29%
- Adequate – 28%
- Poor – 11%
- Very Poor – 5%
- Not Sure - <1%

The helpfulness of Training was rated as follows:

- Excellent – 2%
- Very Good 12%
- Good – 21%
- Adequate – 28%
- Poor – 25%
- Very Poor 13%
- Not Sure - <1%

Employees were asked if the training they received prepared them to provide quality service to TAC customers. They responded as follows:

- Yes – 46%
- No – 41%
- Not Sure – 13%

When asked the most important items needed to improve the customer service experience at the TACs, TRRs responded:

1. More privacy in TAC offices – 48%
2. Quicker problem/issue resolution – 48%
3. Increased staffing – 41%
4. Offering expanded services – 38%
5. Shorter wait times – 29%

TRRs were asked: How long have you worked for IRS? How long have you worked in a TAC office? Please identify the areas you have worked during your IRS career. Respondents answered as follows:

How long have you worked for IRS?

- Less than one year – 10%
- One to three years – 6%
- Three to five years – 5%
- Five to ten years – 12%
- Ten or more years – 67%

How long have you worked in a TAC office?

- Less than six months – 5%
- Six to twelve months – 12%
- One to three years – 12%
- Three to five years – 14%
- Five or more years – 57%

Areas worked during your IRS career?

- Field Assistance – 89%
- Call Site – 33%
- Collection – 31%
- Examination – 27%
- Campus – 16%
- Other – 14%
- Appeals – 2%

We compared how long respondents have worked in a TAC office with overall job satisfaction:

- Of respondents having worked less than a year, 64% indicated satisfied or very satisfied.
- Of respondents having worked one to five years, 59% indicated satisfied or very satisfied.
- Of respondents having worked more than five years, 54% indicated satisfied or very satisfied.

Summary of Employee Survey Observations/Concerns

The TAC Issue Committee had the following observations and concerns regarding responses obtained in the Employee Survey:

The number of problems identified by TRRs seems to be inversely proportional to employee longevity. Perhaps this has to do with a lack of retraining, which TRRs often cite as a problem.

Twenty-four comments made in reference to Question 15 suggested changes to the Q-MATIC[®] system or a better explanation of the system to customers, which could avoid customer dissatisfaction resulting from perceived unfairness in the order customers are served.

Managerial Support is clearly the strongest category with a total of 78% saying Managerial Support was “adequate” or better. This is an area for which TAC management should be complimented.

With regard to policies and procedures, TRRs stated in written comments that PMG policies and procedures were too restrictive and/or that updated PMGs were not readily available, as needed. Respondents said that policies and procedures were most helpful with answering refund inquiries, accepting non-cash payments, providing tax forms /instructions/publications, providing income information, updating taxpayer addresses, and establishing payment terms/agreements. Policies and Procedures were identified as most hindering answering tax law questions, accepting cash payments, TDS, and processing ITIN applications.

Current Staffing levels were perceived by TRRs to be a significant problem. TRR comments suggested increasing staffing as a way to improve services at TACs. Perhaps concerns about staffing were exacerbated at the time of the survey because of the large number of vacancies that existed at the time.

TRRs rated equipment as one of the least helpful factors in performing their duties. The data indicate a predominant need for general office supplies, followed by the need for furniture, computers, and printers.

Sixty-seven percent of TRRs said that Reference Materials helped them to provide quality service. Twenty-one percent found that some reference materials were not helpful. Of that group, the IRM¹⁶, PMG, and SERP¹⁷ (and other references) were identified as not helpful. The survey did not elicit information as to why they were not considered helpful.

Is this because materials arrived late, they were inadequate or for some other reason?

Since some references are computerized, is the fact that employees feel they do not have enough computers at the root of this problem?

Are there enough computers that are conveniently located within the proximity of the assistor?

Training appears to be a problem. When additional training was requested, it was in the following areas:

- Answering tax law questions,
- Answering account questions, and
- Answering procedural questions.

It appears survey respondents would like to expand the scope of services provided and that they feel that training could help accomplish this enhancement. Respondents seemed to indicate that training should be problem-specific, with opportunities for retraining when necessary. TRRs also need the opportunity to solidify the knowledge acquired in any new training. This appears to be the best way to capitalize on the Service's greatest asset – the TRR. The committee felt this was one of the most obvious findings of the survey.

¹⁶The Internal Revenue Manual (IRM) is the single official source for IRS policies, directives, guidelines, procedure and delegations of authority in the IRS.

¹⁷ The Servicewide Electronic Research Portal (SERP) is designed to provide employees from all IRS functions Intranet access to IRMs and other reference materials, and to retrieve frequently-referenced documents required to perform their jobs.

Recommendations to Field Assistance Management

Policies & Procedures

1. *It is imperative that Field Assistance Headquarters revise policies and procedures to allow them to timely recognize and respond to changing conditions. TRRs should actively participate in reviewing and revising policies and procedures.*

Rationale: Some existing policies and procedures are impeding delivery of services. Survey respondents indicated that some services, including answering tax law and account questions, accepting cash payments, and assisting with ITIN applications are hindered by some existing policies and procedures.

2. *Improve procedures to accept cash, including providing cash conversion kiosks, so that all TACs can accept cash payments.*

Rationale: A significant number of TAC customers do not have checking accounts and many of these customers do not realize that some TACs do not accept cash. Employees identified that the process of accepting cash is one impediment to providing good service.

3. *Telephone technical support service must always be available for TAC employees. Field Assistance management should work with Accounts Management to improve the telephone technical support referral process used by the TACs.*

Rationale: TAC employees do not have immediate access to the Accounts Management toll-free line. Numerous comments from the Employee Survey reported frustration when employees are not able to easily access assistance from Accounts Management. They feel that technical accuracy is compromised when TAC employees cannot get the information they need from Accounts Management.

Training

4. *Field Assistance management should identify training needed and timely and efficient delivery methods that meet the training needs of staff.*

Rationale: The survey indicated that employees needed additional training in three areas, (1) answering tax law questions, (2) answering accounts questions, and (3) answering procedural questions. Some employee comments indicate that training is remote, in time, from the use of the skills for which training is given. The need for timely training was expressed by employees of all service longevity. The data indicated that the longest-term employees felt the greatest need for training.

Resources

5. *Basic office supplies are needed in the TACs. Field Assistance management needs to have a better mechanism for identifying and providing the equipment (including basic office supplies) necessary for all employees.*

Rationale: The survey indicated that employees are generally satisfied with the office equipment and supplies they have, but there are some supplies, such as office supplies and computer equipment (e.g., computers/copiers/printers) that are not easily accessible to employees. The location and number of computers in many instances hampers the efficient delivery of services.

6. *Field Assistance management should provide timely updates to the Publication Method Guide (PMG).*

Rationale: PMG updates have sometimes been seriously delinquent. The IRS is moving toward an interactive electronic version of the PMG which should mitigate this problem.¹⁸

7. *Field Assistance management should work to increase staffing to produce quicker problem/issue resolution and reduced wait times for customers.¹⁹*

Rationale: The top response from customers about what could have improved their visit was a shorter wait time. Correspondingly, conduct a focus group-type process with TAC staff. Employee survey responses indicate that current staffing levels were the least helpful in performing their job duties.

Scope of Services

8. *Further study by the IRS is needed to understand why TAC employees feel less satisfied with the service they provide than customers feel with the service they receive.*

Rationale: Root-cause analysis could determine the reason(s) for this disparity.

¹⁸ The IRS has no control over last minute tax code changes which create last minute changes to the PMG.

¹⁹ The committee recognizes that TAC staffing levels in fiscal year 2007 were unusually low.

9. *The appropriate IRS officials need to better understand the TAC customers' computer skills level and willingness to use the Internet, especially if the IRS wants to encourage greater use of IRS.gov.*

Rationale: Fifty-nine percent of the respondents indicated they had Internet access at home, but there was no way to determine if they used the Internet or even had basic computer skills. This could add to the information already obtained regarding why taxpayers prefer to use TACs when Internet services are available, and presumably, more accessible.

10. *Expand the efforts to inform customers of services available at the TACs, on the Internet, and the toll-free numbers.*

Rationale: Informing customers of the services available at the TACs, as well as those available on the IRS website and toll-free numbers, will give customers the opportunity to choose options that would most appropriately fulfill their needs.

11. *Field Assistance management should look for opportunities to adjust the scope of services offered by TACs, (e.g., providing transcripts to taxpayers, scheduling return preparation appointments by phone, etc.) This would include evaluating additional out-of-scope¹⁶ tax law issues that could be added as in-scope¹⁷ without too much difficulty. The scope of services should recognize variances in demographic and economic patterns or local/regional events that affect taxpayers, such as disasters.*

Rationale: Field Assistance management needs to be more responsive to demands of emerging issues. Currently, transcripts are available only when related to resolving tax problems. Others who need transcripts, typically for citizenship, student loan applications, and mortgage purposes, are required to order transcripts by phone, a process that takes about two weeks. It often takes longer to refuse service to a taxpayer requesting an account transcript, than to actually provide the service.

¹⁶ “Out-of-scope” refers to tax law topics which are not permitted to be answered by the TAC employee. The employee must refer the inquiry to another branch of IRS for an answer.

¹⁷ “In-scope” refers to tax law topics which may be answered by the TAC employee.

Facilities

- 12.** *Field Assistance management should take steps to enhance the customer experience while in the TAC. While waiting for service, customers might be able to view a silent video explaining the services offered at the TAC, as well as the procedure for getting service. This could make the Q-MATIC[®] system transparent, so that TAC customers could feel they are being treated fairly and efficiently.*

Rationale: Currently, at most TAC offices, customers are given a number upon registering with the TAC greeter²⁰. Customers see others (who entered the TAC after them) going to a window for service before they do and often believe they are being unfairly treated. The video could help alleviate this confusion and let customers know that they have alternatives for obtaining some services.

- 13.** *TACs should accelerate the remodeling process to increase customer privacy.*

Rationale: The Employee Survey reflected employee frustration with the lack of customer privacy afforded in the TAC offices.

General Recommendation

- 14.** *Field Assistance management should hold focus groups with the TAC employees to solicit their ideas for resolving the problems identified by the Employee Survey (training, policies, procedures, etc.) The focus groups should be facilitated by an independent moderator (not by management).*

Rationale: The committee believes that often, the best source for resolving issues and problems is the employees who identified them. By asking the employees facing the problems, Field Assistance management may get the best ideas and give the employees a sense of ownership in the solution. The use of independent moderators may result in more open and honest feedback.

²⁰ Not all TACs employ greeters. In those TACs that do not utilize greeters, customers have access to IRS Publication 12069 (“While You Are Waiting” Explanation of Q-MATIC). This publication informs the customer that their ticket numbers may not be called in numerical order or by arrival time, their number is assigned based on the topic they selected, and the specialist for their topic will call their number.

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Orientation Talking Points (Phase 1)

Orientation Talking Points – Phase 1

Committee: The Taxpayer Assistance Center (TAC) issue committee was formed in 2005. Estelle Tunley, Director of Field Assistance, wanted to get a better understanding of the experience TAC customers had when visiting their local centers. Realizing the resources and experience that the Taxpayer Advocacy Panel has in dealing with the public, Estelle decided to call on their expertise.

Task: The TAC issue committee has been tasked with formulating and administering a survey process which will gain knowledge of the experience customers have when conducting business at a taxpayer assistance center (also known as a walk-in center).

Purpose: Over the last three years, taxpayer assistance centers have provided a survey to all visitors that enter a TAC office. After the visitor is served, he/she is given an opportunity to provide feedback on the service(s) received and return the survey to a box located in the TAC. This survey, known as "Your Opinion Counts!", provides valuable information on the customer's visit. However, analysis of survey results does not paint a true picture of the customer's experience. The survey lacks the detail needed to determine why customers are satisfied or dissatisfied. In order to gain an understanding of the customer's experience, a different survey process is needed.

Methodology: TAP members will administer the surveys at designated taxpayer assistance centers within driving distance of their residence. There will be two phases to the survey. The first phase will take place during the 2007 filing season (in February and March) and the second phase will take place after the filing season (in May). The TAC committee will also survey IRS employees working in the centers to get a better understanding of the customer experience from the employee's standpoint. This will be completed separately from the customer survey and will not require the assistance of volunteer TAP survey administrators.

**Orientation Talking Points (Phase 1)
(continued)****Pre-Survey Actions:**

1. Prior to administering the survey, you will have a pre-arranged date and time for you to administer the survey at a designated taxpayer assistance center.
2. You will be provided contact information for a manager or employee at the assigned taxpayer assistance center.
3. Ensure you have received the following materials by mail:
 - Surveys (35)
 - Placards (3)
 - Survey Talking Points (1)
 - Overnight Return Envelope (1)
 - TAP Name Tag
 - Tic Sheet (1)

On the Day of the Survey:

1. Arrive at the assigned Taxpayer Assistance Center approximately 30 minutes early with all materials (including some business cards). This will allow sufficient set up time. You'll also have some time to get familiar with customer traffic areas.
2. Check to see if a table and chair(s) have been provided to you outside the taxpayer assistance center or close to the center. Clipboards, pens and tape to secure the placards will be provided by the centers.
3. While wearing your name tag, introduce yourself to the intake person at the center (or tax resolution representative) and find the designated table and chair(s) near the exit of the TAC.
 - Verify that the "Your Opinion Counts" survey has been removed while you are administering the survey.
 - Survey thank-you gifts, pens and "Speak-Up" brochures will have already been sent to the TAC. Please ask your contact for these items.
4. Place placards on the table, visible to exiting customers.

**Orientation Talking Points (Phase 1)
(continued)**

Administering the Survey:

1. Establish contact with customers exiting the taxpayer assistance center. (Refer to *TAC Survey Suggested Script and Talking Points*). It's important to approach ALL possible customers exiting the center. However, we realize several customers may be leaving at the same time. In this situation, try to intercept as many customers as possible. Do not "select" customers to take the survey.
2. If the customer agrees to take the survey:
 - Provide a survey and pen and offer the customer a chair.
 - Allow the customer to take the survey uninterrupted. Do not read the survey questions to the customer. Interacting with the customer or helping them with the survey may create an unintentional bias with the survey results. If the customer asks about a question while taking the survey, simply state that they should answer to the best of their knowledge.
 - Collect the survey, thank the customer for their time and input and offer them ONE thank-you gift and a "Speak-Up" tri-fold brochure.
3. After collecting the survey, place it in a secure place, out of public view.
4. Make a tic mark in the appropriate column on the tic sheet.
5. If the customer does not agree to take the survey:
 - Offer the customer a "Speak-up" tri-fold brochure and let them know that the Taxpayer Advocacy Panel is always available for suggestions on improving the IRS.
 - Make a tic mark in the appropriate column on the tic sheet.
6. The survey requirement is to secure 20 surveys at each site during Phase 1. However, the more surveys secured the better, since some surveys may have to be discarded for technical reasons.

**Orientation Talking Points (Phase 1)
(continued)**

- As soon as you have completed your TAC visit, send an e-mail, including the location visited, the date of the visit and the number of surveys secured to TAC analyst Dave Coffman at Dave.A.Coffman@irs.gov.
- If you have not completed the required number of surveys, inform Dave that you will need an additional day to complete the requirement.

Things to Remember:

1. The survey requirement is to secure at least 20 surveys at each survey location during Phase 1.
 - If you have completed this requirement, inform the analyst via e-mail as soon as possible.
 - If you have not completed this requirement, contact Dave to schedule another survey date.
2. While one customer is taking the survey, approach another customer with a survey.
3. There is no need to “dress up” for the survey. Wear comfortable business-casual clothes (a suit and tie might scare off some customers).
4. Do not bring friends/family to help administer the survey. This is a TAP sponsored survey.
5. If a customer provides a suggestion for IRS improvement, contact your Area Analyst with the suggestion.
6. A couple of important reminders:
 - *Do not read the survey to the customer*
 - *Ask each customer exiting the taxpayer assistance center to take the survey.*

After All Surveys Have Been Completed:

1. Place all surveys in the overnight return envelope and send back to the Seattle TAP office.

**Orientation Talking Points (Phase 1)
(continued)**

2. Contact your Area Secretary to arrange for reimbursement for mileage and parking costs.
3. Record this as an outreach event with your Area committee.

Contact Information:

If you run into any problems or have any questions along the way, please contact any of the following IRS staff members:

Judi Nicholas (TAP Manager)
Phone: 206-220-6099, e-mail: Judi.L.Nicholas@irs.gov

Dave Coffman (TAP Analyst)
Phone: 206-220-6095, e-mail: Dave.A.Coffman@irs.gov

Michelle Jones (Field Assistance Analyst)
Phone: 404-338-8721, e-mail: Michelle.R.Jones@irs.gov

THANK YOU for agreeing to be part of this survey administration process. The results of this survey will be reviewed for possible improvements that will improve the TAC customer experience for many years to come.

Orientation Talking Points (Phase 2)

Orientation Talking Points (Phase 2)

Committee: The Taxpayer Assistance Center (TAC) issue committee was formed in 2005. Estelle Tunley, Director of Field Assistance, wanted to get a better understanding of the experience TAC customers had when visiting their local centers. Realizing the resources and experience that the Taxpayer Advocacy Panel has in dealing with the public, Estelle decided to call on their expertise.

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Orientation Talking Points (Phase 2) (continued)

Pre-Survey Actions:

1. Prior to administering the survey, you will have a pre-arranged date and time for you to administer the survey at a designated taxpayer assistance center.
2. You will be provided contact information for a manager or employee at the assigned taxpayer assistance center.
3. Ensure you have received the following materials by mail:
 - Surveys in English (25)
 - Surveys in Spanish (5-10, depending on location)
 - Placards (3)
 - Survey Talking Points (1)
 - TAP Name Tag
 - Tic Sheet (1)

On the Day of the Survey:

1. Arrive at the assigned Taxpayer Assistance Center approximately 30 minutes early with all materials (including some business cards). This will allow sufficient set up time. You'll also have some time to get familiar with customer traffic areas.
2. Check to see if a table and chair(s) have been provided to you outside the taxpayer assistance center or close to the center. Clipboards, pens and tape to secure the placards will be provided by the centers.
3. While wearing your name tag, introduce yourself to the intake person at the center (or tax resolution representative) and find the designated table and chair(s) near the exit of the TAC.
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4. Place placards on the table, visible to exiting customers.

**Orientation Talking Points (Phase 2)
(continued)**

Administering the Survey:

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 - Collect the survey, thank the customer for their time and input and offer them ONE thank-you gift and a "Speak-Up" tri-fold brochure.
3. After collecting the survey, place it in a secure place, out of public view.
4. Cross off the number on the appropriate column on the tic sheet.
5. If the customer does not agree to take the survey:
 - Offer the customer a "Speak-up" tri-fold brochure and let them know that the Taxpayer Advocacy Panel is always available for suggestions on improving the IRS.
 - Cross off the number in the appropriate column on the tic sheet.

**Orientation Talking Points (Phase 2)
(continued)**

6. The survey requirement is to secure 20 surveys at each site. However, the more surveys secured the better, since some surveys may be discarded for technical reasons.
 - As soon as you have completed your TAC visit, send an e-mail, including the location visited, the date of the visit and the number of surveys secured to TAC analyst Dave Coffman at Dave.A.Coffman@irs.gov.
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 - If you have completed this requirement, inform the analyst via e-mail as soon as possible.
 - If you have not completed this requirement, contact Dave to schedule another survey date.
2. While one customer is taking the survey, approach another customer with a survey.
3. There is no need to "dress up" for the survey. Wear comfortable business-casual clothes (a suit and tie might scare off some customers).
4. Do not bring friends/family to help administer the survey. This is a TAP sponsored survey.
5. If a customer provides a suggestion for IRS improvement, contact your Area Analyst with the suggestion.
6. A couple of important reminders:
 - *Do not read the survey to the customer*
 - *Ask each customer exiting the taxpayer assistance center to take the survey.*

**Orientation Talking Points (Phase 2)
(continued)****After All Surveys Have Been Completed:**

1. Return the surveys via UPS next day air.

UPS has drop sites at UPS stores, Office Depot and several UPS "drop boxes" located in major cities. Locations for shipping can be located by zip code at the UPS web site (www.ups.com). Each drop site should have a carbonless form titled "UPS Next Day Air". You won't need to pay anything for this service; the IRS will be billed directly. Please review the document *UPS Airbill Instructions* for guidance on completing the carbonless form.

Please remember to return ALL surveys, whether completed or not.

2. Contact your Area Secretary to arrange for reimbursement for mileage and parking costs.
3. Record this as an outreach event with your Area committee.

Contact Information:

If you run into any problems or have any questions along the way, please contact any of the following IRS staff members:

Judi Nicholas (TAP Manager)
Phone: 206-220-6099, e-mail: Judi.L.Nicholas@irs.gov

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Phone: 206-220-6095, e-mail: Dave.A.Coffman@irs.gov

Michelle Jones (Field Assistance Analyst)
Phone: 404-338-8721, e-mail: Michelle.R.Jones@irs.gov

THANK YOU for agreeing to be part of this survey administration process. The results of this survey will be reviewed for possible improvements that will improve the TAC customer experience for many years to come.

Survey Placard



**Your
Opinion
Counts**

**Please take our short
anonymous survey
before you leave**

Taxpayer Advocacy Panel
**Working with the IRS to improve customer
service.**

Tic Sheet (Phase 1)

TAP Volunteer _____ TAC Location _____

Customers That Agreed to Take the Survey	Customers That Declined to Take the Survey	Customers That Require A Survey in a Language Other Than English
1	1	1
2	2	2
3	3	3
4	4	4
5	5	5
6	6	6
7	7	7
8	8	8
9	9	9
10	10	10
11	11	11
12	12	12
13	13	13
14	14	14
15	15	15
16	16	16
17	17	17
18	18	18
19	19	19
20	20	20
21	21	21
22	22	22
23	23	23
24	24	24
25	25	25
26	26	26
27	27	27
28	28	28
29	29	29
30	30	30
31	31	31
32	32	32
33	33	33
34	34	34
35	35	35
36	36	36
37	37	37
38	38	38
39	39	39
40	40	40
41	41	41
42	42	42
43	43	43
44	44	44
45	45	45
46	46	46
47	47	47
48	48	48
49	49	49
50	50	50
51	51	51
52	52	52
53	53	53
54	54	54
55	55	55
56	56	56
57	57	57
58	58	58
59	59	59
60	60	60
61	61	61
62	62	62
63	63	63
64	64	64
65	65	65
66	66	66
67	67	67
68	68	68
69	69	69
70	70	70
71	71	71
72	72	72
73	73	73
74	74	74
75	75	75
76	76	76
77	77	77
78	78	78
79	79	79
80	80	80
81	81	81
82	82	82
83	83	83
84	84	84
85	85	85
86	86	86
87	87	87
88	88	88
89	89	89
90	90	90
91	91	91
92	92	92
93	93	93
94	94	94
95	95	95
96	96	96
97	97	97
98	98	98
99	99	99
100	100	100

Phase 1

Tic Sheet (Phase 2)

TAP Volunteer _____

TAC Location _____

Customers That **Agreed**
to Take the Survey

1	2	3	4	5
6	7	8	9	10
11	12	13	14	15
16	17	18	19	20
21	22	23	24	25
26	27	28	29	30
31	32	33	34	35
36	37	38	39	40
41	42	43	44	45
46	47	48	49	50
51	52	53	54	55
56	57	58	59	60
61	62	63	64	65
66	67	68	69	70
71	72	73	74	75
76	77	78	79	80
81	82	83	84	85
86	87	88	89	90
91	92	93	94	95
96	97	98	99	100

Customers That **Declined**
to Take the Survey

1	2	3	4	5
6	7	8	9	10
11	12	13	14	15
16	17	18	19	20
21	22	23	24	25
26	27	28	29	30
31	32	33	34	35
36	37	38	39	40
41	42	43	44	45
46	47	48	49	50
51	52	53	54	55
56	57	58	59	60
61	62	63	64	65
66	67	68	69	70
71	72	73	74	75
76	77	78	79	80
81	82	83	84	85
86	87	88	89	90
91	92	93	94	95
96	97	98	99	100

Customers That Require A
Survey in a Language
Other Than English

1	2	3	4	5
6	7	8	9	10
11	12	13	14	15
16	17	18	19	20
21	22	23	24	25
26	27	28	29	30
31	32	33	34	35
36	37	38	39	40
41	42	43	44	45
46	47	48	49	50
51	52	53	54	55
56	57	58	59	60
61	62	63	64	65
66	67	68	69	70
71	72	73	74	75
76	77	78	79	80
81	82	83	84	85
86	87	88	89	90
91	92	93	94	95
96	97	98	99	100

Phase 2

Suggested Script

TAC Survey Suggested Script/Talking Points

Good morning (afternoon), I'm (name), an unpaid volunteer with the Taxpayer Advocacy Panel. We work with IRS executives to develop ways for the IRS to improve customer service. We're conducting a survey about your experience here today and we'd like to take a few minutes of your time to get your thoughts.

Talking Points for Possible Questions

How Long Will It Take?

About five minutes, but you are welcome to take as long as you want to give us your thoughts.

Why Should I Fill This Out?

Everyone complains about the government, especially the IRS. Here's your chance to do something about it.

Can I Take It Home And Do It There And Mail It Back?

We discourage this because it will add to the cost, which will be paid with your tax dollars. We are conducting this survey as unpaid volunteers to further keep costs down.

Will You Be Publishing The Results?

We won't be publishing the results, but you will see the improvements in future visits to this office once the results are compiled and key suggestions implemented.

Employee Reminder Notice**Employee reminder notice**

The Customer Experience survey is being administered to gain knowledge of the experience customers have when conducting business at taxpayer assistance center.

Survey dates:**Filing Season**

Feb. 13th, 14th, & 15th - March 6th, 7th &, 8th

Post filing season

May 7th - 9th and May 22nd-24th

Survey time frame:

9:00 am – 4:00 pm

Do not administer the “Your Opinion Count” survey during the above dates.

Please encourage taxpayer’s participation by directing them to the survey administration table in your TAC.

Customer Survey (English)

(Front)

Date of Visit (mmdd)

2007 Taxpayer Advocacy Panel Survey of IRS Customers

1. What was your *PRIMARY* reason for visiting the IRS Walk-in office today? (Mark all that apply)

a. Resolve an IRS notice or letter related issue <input type="checkbox"/>	i. File a tax return or form <input type="checkbox"/>
b. Get an answer to a tax question <input type="checkbox"/>	j. Verify that a completed return is correct <input type="checkbox"/>
c. Obtain tax forms/publications/instructions <input type="checkbox"/>	k. Apply for an identification number (EIN, ITIN, etc.) <input type="checkbox"/>
d. Have a tax return prepared <input type="checkbox"/>	l. Obtain income information (W-2, 1099, etc.) <input type="checkbox"/>
e. Find out about a tax refund <input type="checkbox"/>	m. Get a copy of prior year return <input type="checkbox"/>
f. Get a lien or levy released <input type="checkbox"/>	n. Resolve an electronic rejected return <input type="checkbox"/>
g. Make a payment <input type="checkbox"/>	o. Other (tell us): _____ <input type="checkbox"/>
h. Set up a payment agreement <input type="checkbox"/>	

2. Why did you visit the IRS Office (also known as Taxpayer Assistance Centers) today instead of using some other IRS Service? (Mark all that apply)

a. Used the walk-in service before <input type="checkbox"/>	f. Wanted to show someone the papers that I received / was working on <input type="checkbox"/>
b. Location close to home <input type="checkbox"/>	g. Wanted to talk face-to-face with an IRS representative <input type="checkbox"/>
c. Location close to work <input type="checkbox"/>	h. Did not think I could get the information from another source <input type="checkbox"/>
d. Question very complicated <input type="checkbox"/>	i. Needed language assistance <input type="checkbox"/>
e. Question was urgent / time sensitive <input type="checkbox"/>	j. Other (tell us) _____ <input type="checkbox"/>

3. What service did you need today that was not available to you? (Mark all that apply)

a. Forms/publications needed were not available <input type="checkbox"/>	f. Lien/Levy released (or proof of release) <input type="checkbox"/>
b. Copy of my prior year tax return <input type="checkbox"/>	g. Set up a payment (installment) agreement <input type="checkbox"/>
c. Copy of income documents (W-2, 1099, etc.) <input type="checkbox"/>	h. Make an appointment to have a return prepared <input type="checkbox"/>
d. Help preparing my tax return <input type="checkbox"/>	i. Other (tell us) _____ <input type="checkbox"/>
e. Make an appointment for another day <input type="checkbox"/>	

4. Overall, how satisfied are you with the service you received at the IRS Walk-in Office today?
(Mark one)

Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied	Not Sure
<input type="checkbox"/>					

5. What worked well with your visit to the IRS Walk-in Office? (Mark all that apply)

a. Wait time was less than I expected <input type="checkbox"/>	g. The service I needed was available <input type="checkbox"/>
b. Able to resolve problem/issue <input type="checkbox"/>	h. I was able to talk to someone in my language <input type="checkbox"/>
c. Got the tax forms/publications I needed <input type="checkbox"/>	i. I understood what the IRS employee told me <input type="checkbox"/>
d. IRS Office is in a convenient location <input type="checkbox"/>	j. I was able to make an appointment <input type="checkbox"/>
e. Meeting area provided adequate privacy <input type="checkbox"/>	k. I was not satisfied with my visit to the IRS Office <input type="checkbox"/>
f. IRS employee was professional <input type="checkbox"/>	l. Other (tell us) _____ <input type="checkbox"/>

Please continue on back

Customer Survey (English)

(Back)

6. What could have improved your visit to the IRS Walk-in Office? (Mark all that apply)

- | | | | |
|--|--------------------------|---|--------------------------|
| a. A shorter wait time | <input type="checkbox"/> | g. If the service I needed was available | <input type="checkbox"/> |
| b. If the problem/issue was resolved | <input type="checkbox"/> | h. If I was able to speak to someone in my language | <input type="checkbox"/> |
| c. If the tax forms/publications I needed were available | <input type="checkbox"/> | i. If I understood what the IRS employee told me | <input type="checkbox"/> |
| d. If the IRS Office location was more convenient | <input type="checkbox"/> | j. If I was able to make an appointment | <input type="checkbox"/> |
| e. If there was more privacy in IRS Office | <input type="checkbox"/> | k. I was satisfied with my visit to the IRS Office | <input type="checkbox"/> |
| f. If the IRS employee was more professional | <input type="checkbox"/> | l. Other (tell us) _____ | <input type="checkbox"/> |

7. Please indicate your level of agreement with the following statements. (Mark one for each line)

SD =strongly disagree D =disagree N =neutral A =agree SA =strongly agree DK=don't know

- | | SD | D | N | A | SA | DK |
|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| a. My question or service need was answered | <input type="checkbox"/> |
| b. IRS' Walk-in Office hours are convenient | <input type="checkbox"/> |
| c. IRS' Walk-in Office is in a good location | <input type="checkbox"/> |

About You (Mark one for each question)

- 8. Was your visit today about:**
- | | | | |
|--------------------------|--------------------------|----------------------------------|--------------------------|
| Individual taxes | Business taxes | Both individual & business taxes | Other |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
- 9. Who did/will prepare your 2006 income tax return?**
- | | | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| I did or will | Friend or relative | Paid tax professional | IRS Office Employee | Volunteer Site | Other |
| <input type="checkbox"/> |
- 10. What is your current age?**
- | | | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 18-24 | 25-34 | 35-44 | 45-54 | 55-64 | 65 or older |
| <input type="checkbox"/> |
- 11. What was your total income for 2006?**
- | | | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Less than \$20,000 | \$20,000 - \$34,999 | \$35,000 - \$49,999 | \$50,000 - \$74,999 | \$75,000 - \$99,999 | \$100,000 or more |
| <input type="checkbox"/> |
- 12. What is your primary language?**
- | | | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| English | Spanish | Chinese | French | German | Other |
| <input type="checkbox"/> |
- 13. Do you have internet access at home?**
- | | | |
|--------------------------|--------------------------|--------------------------|
| Yes | No | Not sure |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Thank You for Completing Our Survey!

Please hand your completed survey to the Taxpayer Advocacy Panel Volunteer.

Customer Survey (Spanish)

(Front)

Fecha de la visita (mmd)

Encuesta Sobre 2007 Panel de la Defensa del Contribuyente de los Clientes del IRS

1. ¿Cuál fué su razón *PRINCIPAL* para visitar a la oficina local del IRS hoy? (marque todos que se apliquen)

a. Resolver un aviso del IRS o un asunto relacionado con una carta del IRS	<input type="checkbox"/>	i. Presentar una declaración de impuestos o forma	<input type="checkbox"/>
b. Conseguir una respuesta a una pregunta sobre impuestos	<input type="checkbox"/>	j. Verificar que una declaración completada esté correcta	<input type="checkbox"/>
c. Obtener formas/publicaciones/instrucciones de impuestos	<input type="checkbox"/>	k. Solicitar un número de identificación (patronal [EIN] o de contribuyente individual para extranjeros [ITIN], etc.)	<input type="checkbox"/>
d. Pedir que se prepare una declaración de impuestos	<input type="checkbox"/>	l. Obtener información de ingresos (W-2, 1099, etc.)	<input type="checkbox"/>
e. Averiguar sobre un reembolso de impuesto	<input type="checkbox"/>	m. Conseguir una copia de una declaración de impuestos de un año anterior	<input type="checkbox"/>
f. Resolver un embargo o gravamen	<input type="checkbox"/>	n. Averiguar porque se rechazó una declaración electrónica	<input type="checkbox"/>
g. Efectuar un pago	<input type="checkbox"/>	o. Otro (díganos): _____	<input type="checkbox"/>
h. Establecer un plan de pago	<input type="checkbox"/>		

2. ¿Por qué visitó usted la oficina del IRS (también conocida como el Centro de Ayuda a Contribuyentes) hoy en vez de usar otro servicio del IRS? (marque todos que se apliquen)

a. Utilicé el servicio de la oficina local antes	<input type="checkbox"/>	f. Quería mostrar a alguien los papeles que recibí/en que trabajaba	<input type="checkbox"/>
b. Ubicada cerca de mi casa	<input type="checkbox"/>	g. Quería hablar cara a cara con un representante del IRS	<input type="checkbox"/>
c. Ubicada cerca de mi trabajo	<input type="checkbox"/>	h. No pensaba que <u>podría</u> conseguir la información de otra manera	<input type="checkbox"/>
d. Tengo una pregunta muy complicada	<input type="checkbox"/>	i. Necesitaba ayuda con el idioma	<input type="checkbox"/>
e. La pregunta era urgente	<input type="checkbox"/>	j. Otro (díganos) _____	<input type="checkbox"/>

3. ¿Qué servicio necesitó usted hoy que no estaba disponible para usted? (marque todos que se apliquen)

a. Formas/publicaciones necesarios que no estaban disponibles	<input type="checkbox"/>	f. Soltar un embargo o gravamen (o obtener prueba de cancelación)	<input type="checkbox"/>
b. Copia de mi declaración de impuestos del año anterior	<input type="checkbox"/>	g. Establecer un plan de pago	<input type="checkbox"/>
c. Copia de los documentos de ingresos (W-2, 1099, etc.)	<input type="checkbox"/>	h. Hacer una cita para la preparación de una declaración de impuestos	<input type="checkbox"/>
d. Ayuda con la preparación de mi declaración de impuestos	<input type="checkbox"/>	i. Otro (díganos) _____	<input type="checkbox"/>
e. Pedir cita para otro día	<input type="checkbox"/>		

4. En términos generales, ¿Está satisfecho el servicio que usted recibió hoy en la oficina local del IRS? (marca una)

Muy Descontentado Descontentado Neutral Satisfecho Muy Satisfecho No estoy seguro

5. ¿Qué funcionó bien durante su visita a la oficina local del IRS? (marque todos que se apliquen)

a. La espera no fué tan larga como esperaba	<input type="checkbox"/>	g. Conseguí el servicio que yo necesitaba	<input type="checkbox"/>
b. Pude resolver el problema/la cuestión	<input type="checkbox"/>	h. Pude hablar con alguien en mi lengua	<input type="checkbox"/>
c. Conseguí las formas/publicaciones I necesitadas	<input type="checkbox"/>	i. Entendí lo que me dijo el empleado del IRS	<input type="checkbox"/>
d. La oficina del IRS está situada en un lugar conveniente	<input type="checkbox"/>	j. Pude concertar una cita	<input type="checkbox"/>
e. <u>La área de reunir proveía privacidad adecuado</u>	<input type="checkbox"/>	k. No estoy satisfecho con mi visita a la oficina del IRS	<input type="checkbox"/>
f. El empleado del IRS fué profesional	<input type="checkbox"/>	l. Otro (díganos) _____	<input type="checkbox"/>

Favor de continuar al otro lado

Customer Survey (Spanish)

(Back)

6. ¿Qué pudiera mejorar su visita a la oficina local del IRS? (marque todos que se apliquen)

- | | | | |
|---|--------------------------|--|--------------------------|
| a. Una espera más corta | <input type="checkbox"/> | g. Si ofrecieron el servicio que necesitaba | <input type="checkbox"/> |
| b. Una resolución del problema/la cuestión | <input type="checkbox"/> | h. Si tuviera ayuda en español | <input type="checkbox"/> |
| c. Si las formas y publicaciones que necesitaba fueron disponibles | <input type="checkbox"/> | i. Si pudiera entender lo que me decía el empleado del IRS | <input type="checkbox"/> |
| d. Si la oficina del IRS estaba ubicada en un sitio más conveniente | <input type="checkbox"/> | j. Si pudiera hacer una cita | <input type="checkbox"/> |
| e. Privacidad adecuada en oficina del IRS | <input type="checkbox"/> | k. Estoy satisfecho con mi visita a la oficina del IRS | <input type="checkbox"/> |
| f. Empleados del IRS más profesionales | <input type="checkbox"/> | l. Otro (díganos) | <input type="checkbox"/> |

7. Favor de indicar su nivel del acuerdo con las declaraciones siguientes. (marca una para cada línea)

SD =Desacuerdo fuerte	D = Desacuerdo	N =Neutral	A = De acuerdo	SA = De acuerdo fuerte	DK= No sé
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
a. Recibí ayuda o contestación a mi pregunta	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Las horas de oficina local del IRS son convenientes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. La oficina local del IRS está en un sitio bueno	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Sobre Usted (marca una para cada pregunta)

- 8. ¿De qué se trató su visita hoy?**
- | | | | |
|--------------------------|--------------------------|-------------------------------------|--------------------------|
| Impuestos individuales | Impuestos de negocio | Impuestos individuales y de negocio | Otro |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
- 9. ¿Quién preparó/prepará su declaración de impuestos del año?**
- | | | | | |
|--------------------------|--------------------------|---------------------------------|--------------------------|--------------------------|
| Yo los hice/h | Amigo o pariente | Profesional pagado del impuesto | Sitio Voluntario | Otro |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
- 10. ¿Qué edad tiene?**
- | | | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 18-24 | 25-34 | 35-44 | 45-54 | 55-64 | 65 o más viejo |
| <input type="checkbox"/> |
- 11. ¿Cuál fué su ingreso total para 2006?**
- | | | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Menos de \$20.000 | \$20.000 - \$34,999 | \$35.000 - \$49,999 | \$50.000 - \$74,999 | \$75.000 - \$99,999 | \$100.000 o más |
| <input type="checkbox"/> |
- 12. ¿Cuál es su idioma principal?**
- | | | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| inglés | español | chino | francés | alemán | Otro |
| <input type="checkbox"/> |
- 13. ¿Tiene usted acceso al Internet en casa?**
- | | | |
|--------------------------|--------------------------|--------------------------|
| Sí | No | No seguro |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

¡Gracias por llenar nuestra encuesta!

Favor de presentar su encuesta terminada al voluntario del Panel de la Defensa del Contribuyente de los Clientes del IRS

Employee Survey

This survey was developed by the Taxpayer Advocacy Panel (TAP), a volunteer Federal Advisory Committee, which is working with IRS Field Assistance to find ways to improve customer service in Taxpayer Assistance Centers (TAC). Two different surveys are being conducted as part of this effort, one collecting opinions from customers and the other gathering information from TAC employees. The TAP volunteers will compile responses and write a summary report of study findings. **All responses are voluntary and anonymous.**

Please take a few moments to complete this survey and share your thoughts about how to improve customer services. If you do not have time to complete the survey after you start answering questions, just click on the save button and complete the survey at a later time. Thank you for your cooperation!

TAP Customer Service Survey for Employees

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- 1) Overall, how satisfied are you with the level of service you are able to provide to TAC customers? **(Mark only one)**
 Very Satisfied Satisfied Neutral Dissatisfied Very Dissatisfied

- 2) What answers or services are most difficult for you to provide customers who visit your office? **(Mark all that apply)**
 - Release tax liens/levies
 - Answer account questions
 - Provide tax forms/instructions/publications
 - Answer refund inquiries
 - Update taxpayer addresses
 - Accept cash payments
 - Verify prepared returns are correct
 - Assist with completing ITIN applications
 - Process applications (EIN, ITIN, etc.)
 - I do not provide these types of services to taxpayers

2-1) Please list the **other** answers or services that are difficult for you to provide your customers.

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Employee Survey (continued)

TAP Customer Service Survey for Employees

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3) What types of services are requested that are not available in your office?

Please rate each of the following items based on how well it helps you perform your job duties.

4) Managerial Support
 Excellent Very Good Good Adequate Poor Very Poor Not Sure

5) Policies & Procedures
 Excellent Very Good Good Adequate Poor Very Poor Not Sure

6) Current Staffing Levels
 Excellent Very Good Good Adequate Poor Very Poor Not Sure

7) Equipment
 Excellent Very Good Good Adequate Poor Very Poor Not Sure

8) Reference Materials
 Excellent Very Good Good Adequate Poor Very Poor Not Sure

9) Training
 Excellent Very Good Good Adequate Poor Very Poor Not Sure

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Employee Survey (continued)

TAP Customer Service Survey for Employees

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10) Does the IRS supply all of the equipment you need to provide quality service to customers visiting your TAC? (Mark only one)

Yes No Not Sure

10-1) What type of equipment do you need to provide better service to your customers? (Mark all that apply)

Laptop Computer Desktop Computer Printer Fax Machine Furniture Other general office supplies Other

10-2) Please list other equipment you need to provide improved service to your customers.

11) Do the reference materials available to you help you provide quality service to customers visiting your TAC? (Mark only one)

Yes No Not Sure

11-1) What areas of additional reference materials are needed to improve services provided to customers visiting your TAC? (Mark all that apply)

Internal Revenue Manual (IRM) Publication Method Guide (PMG) Servicewide Electronic Research Program (SERP) Other

11-2) Please list other types of reference materials you need to provide quality service to customers visiting your TAC.

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Employee Survey (continued)

TAP Customer Service Survey for Employees

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1.2) Does the **training** you receive allow you to provide quality service to customers visiting your TAC? (Mark only one)

Yes No Not Sure

1.2-1) What areas of additional training are needed to improve services provided to customers visiting your TAC? (Mark all that apply)

- Release tax liens/levies Answer tax law questions
- Answer account questions Answer procedural questions
- Provide tax forms/instructions/publications Resolve notice or letter issues
- Answer refund inquiries Assist with individual tax returns (preparation, rejects, filing, etc.)
- Update taxpayer addresses Accept non-cash payments
- Accept cash payments Establish payment terms/agreements
- Verify prepared returns are correct Process requests for prior year return information using TDS
- Assist with completing ITIN applications Provide income information (W-2, 1099, etc.)
- Process applications (EIN, ITIN, etc.) Other

1.2-2) Please list **other** types of training you need to provide quality service to customers visiting your TAC.

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Employee Survey (continued)

TAP Customer Service Survey for Employees

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13) Please indicate whether current policies and procedures help or hinder your ability to assist customers with the following issues in your TAC. Select one response for each item. 1 = help, 2 = neutral, 3 = hinder

	1	2	3
Resolve notice or letter issues	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Answer account questions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Provide tax forms/instructions/publications	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Answer refund inquiries	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Update taxpayer addresses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accept cash payments	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Verify prepared returns are correct	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Assist with completing ITIN applications	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Process requests for prior year return information via TDS	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Answer tax law questions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Answer procedural questions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Assist with individual tax returns (preparation, rejects, filing, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Release tax liens/levies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accept non-cash payments	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Establish payment terms/agreements	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Process applications (EIN, ITIN, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Provide income information (W-2, 1099, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

14) Please select the three items that are most important to improving customers' experiences in your TAC. Select only one item as most important, one as second most important, and one as third most important. 1 = most important, 2 = 2nd most important, 3 = 3rd most important

	1	2	3
Shorter wait times	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Better TAC location	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
More bilingual employees	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Increased staffing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quicker problem/issue resolution	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
More privacy in TAC office	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
More appointments available	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
More self-service forms/publications	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Offering expanded services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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Employee Survey (continued)

TAP Customer Service Survey for Employees

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15) Do you have any ideas for improving the quality of services customers receive when they visit your TAC? *(Please be specific)*

16) Do you have anything else you would like to add about the service you provide to customers as a TAC employee?

17) How long have you worked for IRS? *(Mark only one)*

Less than 1 year 1 - 3 years 3 - 5 years 5 - 10 years More than 10 years

18) How long have you worked in a TAC office? *(Mark only one)*

Less than 6 months 6 - 12 months 1 - 3 years 3 - 5 years More than 5 years

19) Please identify the areas you have worked during your IRS career. *(Mark all that apply)*

Examination Collection Taxpayer Advocate Appeals Field Assistance Call Site Campus Other

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