**Office of Management and Budget
Clearance Package**
OMB #

**e-help Desk Customer Satisfaction
Focus Group and Survey Project**

**Internal Revenue Service
Wage and Investment Customer Account Services
e-help Operations, Strategy, and Support**

May 18, 2007

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e-help Customer Satisfaction
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I   INTRODUCTION

e-help Operations, Strategy, and Support (EOSS) will administer focus groups and a customer satisfaction survey at the 2007 IRS Nationwide Tax Forum. EOSS will use this research to evaluate the level of customer satisfaction with e-help Desk operations, determine customer needs, and identify work processes that need improvement.

The e-help Desk is an external-facing help desk that provides technical support to tax professionals who experience problems using IRS electronic products. It is recognized as a key IRS e-government program and has serviced over 1 million contacts from tax professionals across the U.S.

The objectives of this research project are to determine:

- Customer satisfaction with help desk services (including call handle times, hold times, accuracy of assistor responses, etc.);
- Customer needs (including preferred method of contact); and
- How work processes can be improved.

II   METHODOLOGY

This study will be conducted by IRS employees at four tax forum locations. The methodology use for this study will include focus group sessions and a customer satisfaction survey. There will be two focus group sessions per location. The sessions will provide a forum for EOSS to gather information from tax professions regarding customer satisfaction levels and help desk operations. IRS employees will canvass and screen tax forum attendees between seminars. The targeted recruitment goal is 30 participants per location (15 per session). There will be minimal recruitment effort for the focus group since many of the tax forum attendees are tax professionals and are familiar with IRS electronic products and the e-help Desk. The expected response rate for each focus group is fifty-five percent; therefore recruiters will have to canvass a minimum of 55 attendees per location to meet the recruitment goal.

The survey will be administered to tax forum participants who receive service in the e-IRS Room after completing one of the following services: registering for an IRS electronic services/products, updating profiles on an existing application, or receiving help desk assistance for technical problems (i.e. password reset, locked accounts, etc.). There will be minimal recruit efforts for the survey since the participant will already be seated at a computer kiosk with an IRS employee. The expected response rate for the survey is eighty-five percent.

Efforts to Maximize Response Rates
To maximize response rates the e-help Desk will include an advertisement on its toll-free telephone system informing callers about the IRS Nationwide Tax Forums and the customer satisfaction research project.

Stipend
A stipend will not be given to participants for this study.

Participant Criteria
Focus Groups
Participant must have contacted the e-help Desk for assistance with IRS electronic products/services from their place of business/residence.

Survey Administration
Participants must have received service/assistance in the e-IRS Room at the IRS Tax Forum.

Sample Design
The population will include tax professionals who attend the 2007 IRS Nationwide Tax Forums and have experience with e-help Desk operations either from their place of business/residence or in the e-IRS Room.

Data Collection Date
The data from the focus groups will be collected on the following dates:
Atlanta, GA   July 18 – July 19, 2007
Chicago, IL   August 1 – August 2, 2007
Las Vegas, NV   August 22 – August 23, 2007
New York, NY   August 29 – August 30, 2007

The data from the customer satisfaction survey will be collected on the following dates:
Atlanta, GA   July 17 – July 19, 2007
Chicago, IL   July 31 – August 2, 2007
Las Vegas, NV   August 21 – August 23, 2007
New York, NY   August 28 – August 30, 2007

Cost Estimate
The estimates cost for this study is $12,975.50.

III   PRIVACY, SECURITY, DISCLOSURE, CONFIDENTIALITY
All participants will be subject to the provisions of the Taxpayer Bill of Rights II during this study and IRS employees will ensure that all participants are treated fairly and appropriately.

The security of the data used in this project and the privacy of taxpayers will be carefully safeguarded at all times. Security requirements are based on the Computer Security Act of 1987 and Office of Management and Budget Circular A-130, Appendices A & B. Physical security measures include a locked, secure office. Notes are stored in locked cabinets or shredded. Data security at the C-2 level is accomplished via the Windows

NT operating system. Systems are password protected, users profiled for authorized use, and individual audit trails generated and reviewed periodically.

The IRS will apply and meet fair information and record-keeping practices to ensure privacy protection of all taxpayers. This includes criteria for disclosure—laid out in the Privacy Act of 1974, the Freedom of Information Act, and Section 6103 of the Internal Revenue Code—all of which provide for the protection of taxpayer information as well as its release to authorized recipients.

The survey will not contain tax return or taxpayer information. Participants will not be identified in any of the documents or files used for this project. We will limit and control the amount of information we collect to those items that are necessary to accomplish the research questions. We will carefully safeguard the security of data utilized as well as the privacy of the survey respondents. We will apply the fair information and record-keeping practices to ensure protection of all survey respondents. The criterion for disclosure laid out in the Privacy Act, the Freedom of Information Act, and section 6103 of the Internal Revenue Code provides for the protection of information as well as its releases to authorized recipients.

IV   BURDEN HOURS
The total burden hours for this research project equals 335.83 hours. This total includes 127.33 hours for the focus groups and 208.5 hours for survey administration.

Focus Group
There will be two sixty-minute focus group sessions per location. The target recruitment rate is 30 participants per location (15 per session). **The estimate burden hours for the focus groups equals 127. 33 hours.**

55 Potential Participants X 2 minutes (screen) / 60 minutes = 1.83 hours per location
30 Participants X 60 minutes (focus group session) / 60 minutes = 30 hours per location
Total Focus Group Hours = (1.83 + 30 Hours) X 4 locations = 127.33 hours

Survey Administration
The survey, which includes 5 questions, will be offered to 1,800 potential respondents. The questions are simple and should take no longer than seven minutes to complete. **The estimated burden hour for the survey equals 208.5 hours.**

1,800 Potential Respondents X 1 minutes (screen) / 60 minutes = 30 hours
1,530 Respondents (85%) X 7 minutes (survey administration) / 60 minutes = 178.5 hours
Total Survey Hours = 208.5

V   ATTACHMENTS
   Screener's Guide
   Moderator's Guide
   Survey Questionnaire