

**Office of Management and Budget
Clearance Package**

OMB #

**e-help Desk Customer Satisfaction
Survey Project**

**Internal Revenue Service
Wage and Investment Customer Account Services
Electronic Products Services and Support**

May 28, 2008

OMB Package e-help Customer Satisfaction Survey Project

I INTRODUCTION

Electronic Products Services & Support () will administer a customer satisfaction survey at the 2008 IRS Nationwide Tax Forum. EPSS 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

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. The survey will also be administered in Spanish.

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

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 2008 IRS Nationwide Tax Forums and have received service/assistance in the e-IRS Room at the IRS Tax Forum.

Data Collection Date

The data from the customer satisfaction survey will be collected on the following dates

| | |
|---------------|----------------------------------|
| Atlanta, GA | July 1 – July 3, 2008 |
| Chicago, IL | July 22 – July 24, 2008 |
| Orlando, FL | August 5 – August 7, 2008 |
| Las Vegas, NV | August 19 – August 21, 2008 |
| New York, NY | August 26 – August 28, 2008 |
| San Diego, CA | September 9 – September 11, 2008 |

Cost Estimate

The estimated cost for this study is \$2,000.

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 208.5 hours. This total includes 208.5 hours for survey administration.

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

Survey Questionnaire