

**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 18, 2009**

# OMB Package e-help Customer Satisfaction Survey Project

## I INTRODUCTION

Electronic Products Services & Support () will administer a customer satisfaction survey at the 2009 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 2009 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

Las Vegas, NV	July 7 – July 9, 2009
San Diego, CA	July 14 – July 16, 2009
Orlando, FL	August 4 – August 6, 2009
New York, NY	August 25 – August 27, 2009
Dallas, TX	September 8- September 10, 2009
Atlanta, GA	September 22 – September 24, 2009

### **Cost Estimate**

The estimated cost for this study is \$2,500.

## **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 336 hours.** This total includes 306 hours for survey administration.

##### **Survey Administration**

The survey, which includes 12 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 336 hours.**

1,800 Potential Respondents X 1 minutes (screen) / 60 minutes = 30 hours

1,530 Respondents (85%) X 12 minutes (survey administration) / 60 minutes = 306 hours

Total Survey Hours = 336

#### **V ATTACHMENTS**

**Survey Questionnaire**