

## Appendix K

### **Request for Approval under the “Generic Clearance for the Collection of Routine Customer Feedback” (OMB Control Number: 1545-2256)**

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**TITLE OF THE STUDY:**

IRS OLS Online Chat Attitudes Survey

**PURPOSE:**

Live web chat offers the IRS greater communication efficiencies to taxpayers. The goal of this research is to measure taxpayer attitudes relating to live web chat wants, needs, and potential challenges so that the IRS can begin to understand how chat tools may be used by taxpayers and tax professionals within specific section areas of IRS.gov or within RUP applications like Account.

The study will be conducted using an unmoderated online survey with taxpayers on certain content pages of IRS.gov. Participation is completely voluntary and anonymous, and no personally identifiable information will be collected.

**DESCRIPTION OF RESPONDENTS:**

Individual taxpayers interacting with the Help section of IRS.gov and understanding your 5972c Letter on IRS.gov.

**TYPE OF COLLECTION:** (Check one)

- |  |   |
|--|---|
| <input type="checkbox"/> Customer Comment Card/Complaint Form          | <input type="checkbox"/> Customer Satisfaction Survey           |
| <input type="checkbox"/> Usability Testing (e.g., Website or Software) | <input type="checkbox"/> Small Discussion Group                 |
| <input type="checkbox"/> Focus Group                                   | <input checked="" type="checkbox"/> Other: <u>Online Survey</u> |

**CERTIFICATION:**

I certify the following to be true:

1. The collection is voluntary.
2. The collection is low-burden for respondents and low-cost for the Federal Government.
3. The collection is non-controversial and does not raise issues of concern to other federal agencies.
4. The results are not intended to be disseminated to the public.
5. Information gathered will not be used for the purpose of substantially informing influential policy decisions.
6. The collection is targeted to the solicitation of opinions from respondents who have experience with the program or may have experience with the program in the future.

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To assist review, please provide answers to the following question:

**Personally Identifiable Information:**

1. Is personally identifiable information (PII) collected?  Yes  No

2. If Yes, will any information that is collected be included in records that are subject to the Privacy Act of 1974?  Yes  No
3. If Yes, has an up-to-date System of Records Notice (SORN) been published?  Yes  No

**Gifts or Payments:**

Is an incentive (e.g., money or reimbursement of expenses, token of appreciation) provided to participants?  Yes  No

**BURDEN HOURS:**

*Category of Respondents:* Identify who you expect the respondents to be in terms of the following categories: (1) Individuals or Households; (2) Private Sector; (3) State, local, or tribal governments; or (4) Federal Government. Only one type of respondent can be selected per row.

*No. of Respondents:* Provide an estimate of the Number of Respondents.

*Participation Time:* Provide an estimate of the amount of time (in minutes) required for a respondent to participate (e.g. fill out a survey or participate in a focus group)

*Burden:* Provide the Annual burden hours: Multiply the Number of Respondents and the Participation Time then divide by 60.

*Remove the gray example text prior to submission.*

<b>Category of Respondent</b>	<b>No. of Respondents</b>	<b>Participation Time</b>	<b>Burden</b>
Unmoderated Survey (Category 1, Individuals)	385	5 minutes	32.08 hours
<b>Totals</b>			<b>32.08 hours</b>

**FEDERAL COST:**

There estimated annual cost to the Federal government is **\$0.00**

**If you are conducting a focus group, survey, or plan to employ statistical methods, please provide answers to the following questions:**

**The selection of your targeted respondents**

1. Do you have a customer list or something similar that defines the universe of potential respondents and do you have a sampling plan for selecting from this universe?  
 Yes     No

If the answer is yes, please provide a description of both below (or attach the sampling plan)? If the answer is no, please provide a description of how you plan to identify your potential group of respondents and how you will select them?

Two sources of recruiting:

- 1) A request for volunteers on the “Paying Your Taxes” and/or “Apply Online for a Payment Plan” pages of IRS.gov
- 2) A request for volunteers through our respondent database, professional and social media networks and online forums/job boards.

**Administration of the Instrument**

1. How will you collect the information? (Check all that apply)  
 Web-based or other forms of Social Media  
 Telephone  
 In-person  
 Mail  
 Other, Explain
2. Will interviewers or facilitators be used?  Yes  No

**Please make sure that all instruments, instructions, and scripts are submitted with the request.**