

Request for Approval under the “Generic Clearance for the Collection of Routine Customer Feedback” (OMB Control Number: 1545-2274)

TITLE OF INFORMATION COLLECTION: 2021 IRS Tax Assistance Survey

PURPOSE:

The purpose of this research is to investigate the entire service ecosystem to determine how taxpayers migrate between service channels, what motivates taxpayers to want to shift to online service, and the impact on taxpayers who currently use other service channels. The Services Migration Survey (SMS) will use a taxpayer choice or Conjoint methodology to learn the qualities of preferred service channels, and what influences the decision to utilize alternative channels. In addition, demographic segmentation of survey results will illustrate how taxpayer behavior and strategies for increasing customer satisfaction can vary based on taxpayer characteristics.

DESCRIPTION OF RESPONDENTS:

W&I Research has partnered with Pacific Consulting Group (PCG; a Contractor) to conduct this research. The primary contractor will subcontract an IRS-approved panel, such as Research Now, to randomly select potential participants to participate in the survey. Respondents with a variety of IRS experiences will be allowed to participate in the survey.

TYPE OF COLLECTION: (Check one)

- | | |
|--|--|
| <input type="checkbox"/> Customer Comment Card/Complaint Form | <input checked="" 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 type="checkbox"/> Other: _____ |

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.

Name: Saima Mehmood

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

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

No PII will be collected. Survey respondents will not be identified in any of the documents or files used for this project. Further, no questions will be asked that are of a personal or sensitive nature or require details regarding respondents' tax return or account.

Gifts or Payments:

Is an incentive (e.g., money or reimbursement of expenses, token of appreciation) provided to participants?

Yes No

The subcontractor will provide each panel participant with incentive that has an approximate monetary value of \$1 after participating in the survey.

BURDEN HOURS

Category of Respondent	No. of Respondents	Participation Time	Burden Hours
Initial Contact and Screener	5,000	2 minutes	166.7
Survey Response	1,500	20 minutes	500
TOTAL			666.7

FEDERAL COST: The estimated annual cost to the Federal government is: **\$220,000**

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, 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?

The IRS will not provide the contractor any PII for participant recruitment. The primary contractor will subcontract an IRS-approved panel, such as Research Now, to randomly select potential participants from an established panel to receive emails informing them of an upcoming research effort and inviting them to participate. Only those who meet the minimum requirements for participating will be allowed to respond to the survey.

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

The survey will be administered electronically and there are no cookies involved. Survey participants will be provided a link/web address via a secure website to participate in the survey. Transmission to/from the secure website for the survey will be “encrypted”.

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