

Appendix B

Office of Management and Budget (1545-1432)
CUSTOMER SATISFACTION
Summary of Projects Submitted for Approval and Results of Data Collections
(Information Collections Conducted 2019-2022)

Control # and Name: CS-19-499 W&I Asian Limited-English Proficient Taxpayers Study

Participants: (1020)

Data Collection Began: May 24, 2019 **Data Collection Ended:** July 2, 2019 **Burden Hours:** 314

Cost: \$182,811 **Response Rate:** 58 %

Purpose: The purpose of this research is to better understand where opportunities exist to improve Asian LEP taxpayer awareness of IRS LEP services that could impact compliance.

Findings: LEP taxpayers understand their tax-related obligations. Using a tax preparer is still the norm, despite a decline since 2009. There has been a substantial increase in electronic filing since 2009. LEP taxpayers find preparing taxes difficult, especially the Vietnamese LEP taxpayers. Lack of tax knowledge is the most important reason for finding tax preparation difficult, followed by time/effort and language barrier.

Across six IRS services, there is only partial satisfaction. Awareness of IRS LEP services is low compared to the awareness of non-IRS services. Usage and satisfaction is driven down by a number of reasons. Specifically, LEP taxpayers have concerns about translations related to accuracy, comprehension of translations and about misunderstanding them.

Preferences for advertising channels that would increase awareness differs across the three LEP segments

Actions Taken/Lessons Learned: Continue to address barriers to increase usage of IRS LEP services. Consistent with general IRS channel strategy, address problems with difficulty finding answers on irs.gov. Specifically, for translated documents, overlay translations along with the English version of the documents to enable LEP taxpayers to cross-check the translations in case of confusion or doubt.

Consider partnership opportunities with non-IRS sources. Examine LEP community resources for inclusion in the Stakeholder Partnerships, Education & Communication (SPEC) program. Focus on LEP Vietnamese taxpayer population in providing tax preparation and filing support. Look for SPEC partners in states with high concentration of Vietnamese LEP population - California, Texas, Florida, Washington and Virginia.

Continue to promote electronic filing with special attention towards LEP Mandarin taxpayers. Build more trust around electronic filing by understanding the taxpayer experience and obstacles faced between printing tax returns for review and filing electronically. Explore LEP Mandarin taxpayer segment more in terms of current practices for filing returns, any difficulties faced with electronic filing, support or resources needed.

Control # and Name: CS-19-500 Private Collection Agency (PCA) Survey

Participants: ()

Data Collection Began: 4/2019 **Data Collection Ended:** 3/2020 **Burden Hours:**

Cost: \$ **Response Rate:** %

Purpose:

Findings:

Actions Taken/Lessons Learned:

Control # and Name: CS-19-501 Appeals Customer Satisfaction Survey

Participants: ()

Data Collection Began: 5/2019 **Data Collection Ended:** 1/2020 **Burden Hours:**

Cost: \$ **Response Rate:** %

Purpose:

Findings:

Actions Taken/Lessons Learned:

Control # and Name: CS-19-502 Comprehensive Taxpayer Attitude Survey - WITHDRAWN

Participants: ()

Data Collection Began: **Data Collection Ended:** **Burden Hours:**

Cost: \$ **Response Rate:** %

Purpose:

Findings:

Actions Taken/Lessons Learned:

Control # and Name: CS-19-503 Customer Satisfaction Evaluation for Data Services Customers

Participants: 16 (103)

Data Collection Began: 10/15/2019 **Data Collection Ended:** 11/15/2019 **Burden Hours:** 11

Cost: \$0 **Response Rate:** 16%

Purpose: Governmental Liaison, Disclosure and Safeguards (GLDS) requested this survey to collect feedback from its main customers. The objectives of the survey are (1) to determine levels of satisfaction with GLDS products and services and (2) to find areas for improvement.

Findings: Due to the low response rates of the targeted group, the results from this survey are the opinions of the survey respondents and should not be interpreted as representing the satisfaction levels of the population of Data Services customers.

A majority of respondents (1) understood their agency's obligations under several IRS programs, (2) were either satisfied or very satisfied with multiple aspects of the IRS Computer Matching Program, and (3) had positive views on multiple aspects of the DIFSLA Handbook.

Actions Taken/Lessons Learned: There have been no actions taken yet. The final report will be completed and delivered to the customer in late January (after the 60-day deadline for this summary report). At this time, we are unsure of any actions the customer will take as a result of this survey.

Control # and Name: CS-19-504 Customer Satisfaction Evaluation for Primary Agency Liaisons

Participants: (24)

Data Collection Began: 10/15/19 **Data Collection Ended:** 11/15/19 **Burden Hours:** 20

Cost: \$ 0 **Response Rate:** 16 %

Purpose: Governmental Liaison, Disclosure and Safeguards (GLDS) requested this survey to collect feedback from its main customers. The objectives of the survey are (1) to determine levels of satisfaction with GLDS products and services and (2) to find areas for improvement.

Findings: Due to the low response rates of the targeted group, the results from this survey are the opinions of the survey respondents and should not be interpreted as representing the satisfaction levels of the population of primary liaisons.

A majority of respondents (1) reported no problems with various GLDS data sharing tools and (2) were either very satisfied or satisfied with their IRS governmental liaison.

Actions Taken/Lessons Learned: There have been no actions taken yet.

The final report will be completed and delivered to the customer in late January (after the 60-day deadline for this summary report). At this time, we are unsure of any actions the customer will take as a result of this survey.

Control # and Name: CS-19-505 Customer Satisfaction Evaluation for Users of IRS GLDS Products and Services

Participants: 58 (504)

Data Collection Began: 10/15/2019 **Data Collection Ended:** 11/15/2019 **Burden Hours:** 57

Cost: \$0 **Response Rate:** 12%

Purpose: Governmental Liaison, Disclosure and Safeguards (GLDS) requested this survey to collect feedback from its main customers. The objectives of the survey are (1) to determine levels of satisfaction with GLDS products and services and (2) to find areas for improvement.

Findings: Due to the low response rates of the targeted group, the results from this survey are the opinions of the survey respondents and should not be interpreted as representing the satisfaction levels of the population of primary liaisons.

A majority of respondents were satisfied with products and services offered by (1) Disclosure, (2) Safeguards, and (3) the Governmental Liaison Data Exchange Program and were satisfied overall with (4) the Secure Data Transfer Program.

Actions Taken/Lessons Learned: There have been no actions taken yet.

The final report will be completed and delivered to the customer in late January (after the 60-day deadline for this summary report). At this time, we are unsure of any actions the customer will take as a result of this survey.

Control # and Name: CS-19-506 Indian Tribal Government (ITG) and Tax Exempt Bonds (TEB) Customer Satisfaction Survey

Participants: 51 (178)

Data Collection Began: 11/2019 **Data Collection Ended:** 12/2020 **Burden Hours:** 18

Cost: \$47,000 **Response Rate:** 29 %

Purpose: This research is conducted as part of the IRS agency-wide initiative (RRA 98 and Executive Order 12862) to monitor and improve taxpayer satisfaction with the service provided. The objectives of this study are to track customer satisfaction with the Examination program over time and identify areas where improvements will have the greatest impact on customer satisfaction.

Findings: Overall, customers were satisfied with the way the IRS handled their case and they agreed the IRS employee was courteous. Response rates for both groups was comparable to previous years.

Actions Taken/Lessons Learned: Length of process was not as highly rated, so we are looking at ways to improve the exam process but make it just as effective. Unfortunately, COVID may have played a part in some of the length of process issues, but that is hard to determine.

Control # and Name: CS-19-507 Chief Counsel Pro Bono Day Event Monitoring

Participants: ()

Data Collection Began: 10/2019 **Data Collection Ended:** 10/2022 **Burden Hours:**

Cost: \$ **Response Rate:** %

Purpose:

Findings:

Actions Taken/Lessons Learned:

Control # and Name: CS-19-508 Enrolled Agent Special Enrollment Exam Survey

Participants: 13,782 (15,338)

Data Collection Began: 6/1/2020 **Data Collection Ended:** 2/28/2021 **Burden Hours:** 1,103

Cost: \$ 0 **Response Rate:** 90 %

Purpose: The Competency & Standards Department of the Return Preparer Office (RPO) provides oversight of the Special Enrollment Examination (SEE) for Enrolled Agent candidates. The RPO entered into contract with Prometric to develop and administer the SEE. A voluntary customer satisfaction survey offered at the end of the SEE serves several purposes. It allows RPO and Prometric to evaluate the candidate's perception of the testing process to improve the candidate experience. It allows RPO to measure customer satisfaction to assist with evaluating Prometric's performance consistent with contractual requirements. It provides information on test center locations in relation to distance traveled which is considered when new test centers are opened. It identifies improvement opportunities on an ongoing basis to improve the examination and candidate's experience with Prometric's website, call center, and test centers.

Findings: The response rate of this year's survey was ninety percent. Overall, ninety-nine percent of respondents were very satisfied or satisfied with their testing experience, which exceeds the contractual goal of ninety-five percent. Due to the global pandemic, the start of the testing window was delayed by one month and began on June 1, 2020. When testing began, seating capacity was reduced to 50% at test centers to align with social distancing practices, which resulted in fewer testing appointments being available and fewer tests being administered. These circumstances were reflected in the survey responses. When candidates were asked how satisfied they were with the online scheduling system, responses show ninety five percent of respondents were satisfied overall, which is down three percent from the prior testing window. When candidates were asked how satisfied they were with appointment date/dates

availability, again the percentage dropped to eighty six percent, from ninety one percent during the previous testing window.

Actions Taken/Lessons Learned: To improve overall satisfaction with the testing experience, during the 2020-2021 testing cycle we introduced one scheduled 15-minute break. Previously, only unscheduled breaks were allowed, and the exam clock continued to countdown. We asked candidates how satisfied they were with the scheduled break, and the responses showed a ninety nine percent satisfaction rate. This indicates that we do not need to make any adjustments for the 2021-2022 test cycle, but we will continue to monitor to ensure satisfaction stays high.

As we continue to navigate through the pandemic, we will continue to follow federal, state and local guidelines, and make as many testing appointments available as possible while adhering to social distancing standards. We will ensure all public communications are updated regularly to reflect current status of test centers and appointment availability.

Control # and Name: CS-19-509 TAS Customer Satisfaction Mail Survey

Participants: 11,634 (75,723)

Data Collection Began: 4/10/2020 **Data Collection Ended:** 11/12/2020 **Burden Hours:** 3,143

Cost: \$ 31,070.00 **Response Rate:** 16 %

Purpose: To measure the satisfaction of taxpayers who received assistance from the TAS in resolving their tax issues.

Findings: In FY 2020, TAS customers expressed an 82% level of satisfaction with the services they received. This is the same score as in FY 2019.

The highest rated survey questions are: Your advocate treated you with courtesy (89%), Your advocate listened to you (84%), Your advocate's explanation of what he or she would do to help you with your problem (84%), and Your advocate treated you fairly (83%).

Actions Taken/Lessons Learned: TAS leadership continues to stress the importance of telephone conversations with taxpayers instead of sending letters, keeping customers timely informed throughout the entire process of resolving cases, and confirming the customer completely understands what caused the problem and how to avoid it in the future. TAS continues to train and educate employees on how to better understand customers and how to relate to each individual situation.

TAS has a group of employees (the Customer Satisfaction Advisory Board) who focus on customer satisfaction and provide analysis and evaluation of the TAS Customer Satisfaction (CS) survey through reviews of current practices and examination of available data. Using information provided by team members, we advise TAS leadership regarding ongoing and emerging customer satisfaction issues that will improve the overall customer experience.

Control # and Name: CS-20-510 Private Collection Agency (PCA) Survey

Participants: 71,609 (104,983)

Data Collection Began: 4/2020 **Data Collection Ended:** 3/2021 **Burden Hours:** 3,758

Cost: \$ 50,090 **Response Rate:** 61 %

Purpose: The key goals of the survey are 1) to survey our external customers on an ongoing basis regarding their experience with PCAs, 2) track customer satisfaction progress over time, and 3) identify operational improvements within SB/SE PDC. The feedback received will not institute new policy, yet will enable the Service to meet taxpayer needs effectively.

Findings: The overall satisfaction trend from SY2017 (94%) to SY2019 (95%) shows stability. Respondents demonstrated the highest satisfaction for components related to the professionalism (97%). Satisfaction with the tone and clarity of the notice was lower (79%). All satisfaction component ratings were stable or increased slightly between SY2019 and SY2020.

Actions Taken/Lessons Learned: The results of this analysis suggest that the greatest likelihood to improve PDC taxpayer's overall satisfaction is by maintaining: How clearly the PCA explained issue (Q6), How well the PCA listened to concerns (Q7), and Courtesy of the representative (Q2).

Control # and Name: CS-20-511 CEEN Customer Sat Survey

Participants: 4,116 (22,174)

Data Collection Began: 4/2020 **Data Collection Ended:** 8/2020 **Burden Hours:** 1,742
Cost: \$ 376,362 **Response Rate:** 19 %

Purpose: The overall objective of this task is to survey Small Business/Self Employed (SB/SE) taxpayers regarding their pre-filing, filing, and post-filing needs and preferences. The key goals of this research are to solicit SB/SE taxpayer feedback on the various aspects of the taxpayer experience including satisfaction with IRS interactions and tax administration as a whole, Measure SB/SE taxpayer expectations for interactions with the IRS, Measure SB/SE taxpayer needs for compliant tax administration, and Measure SB/SE taxpayer awareness and use of IRS products and services.

Findings: In all, 74% of respondents indicated they were self-employed or an independent contractor, and 82% said they had a small business, with 56% of respondents saying both applied to them. Nearly half of respondents (45%) have been self-employed or an owner/partner in a small business for 3 years or less. A quarter of respondents (25%) reported paying employees and/or independent contractors in 2019. They most commonly paid employees (39%) followed by independent contractors (28%). The majority of these respondents (62%) did not use a payroll company.

Actions Taken/Lessons Learned: ICF conducted 16 interviews over the phone from September 3 through October 20, 2020. Participants reported various items they wish they knew more about when they first started their business. Some said they wished they knew more about how much taxes cost, how many different types of taxes they would deal with, and how difficult it would be to maintain or keep their taxes organized.

Control # and Name: CS-20-512 LBI Customer Sat Survey

Participants: Domestic - 400 (2615), International 286 (3304)

Data Collection Began: 5/2020 **Data Collection Ended:** 2/2021 **Burden Hours:** 613

Cost: \$ 39,091 **Response Rate:** 12 %

Purpose: Guide LB&I on how to achieve its compliance and taxpayer experience goals for the examination process by identifying strengths and areas for improvement across the audit experience, including trends over time.

Findings: LBI Domestic (2020) - Overall satisfaction in 2020 (4.37 mean) is similar to the previous year (4.28); almost 9 out of 10 auditees express satisfaction with their experience. Both transparency and collaboration/fairness arenas achieve similar 'high' satisfaction scores (92%-94%) as in 2019 (91%). Compared to last year, administrative burden directionally worsened moving from a 'very low' (23%) to a 'low' (28%) rating in 2020; the greatest source of burden remains time spent gathering information for IDRs. Additionally, faster resolution of complex issues, reducing open or un-agreed issues, and spending less time on audit examinations would have the most impact on taxpayers' 'overall tax certainty'. Timelines and time spent are consistent pain points. Those with audits lasting more than 12 months are less satisfied with their audit experience (82%) versus those whose audits were completed in 12 or fewer months (88%-92%). Adding to the issue is an expectation versus reality differential about the audit timeline. Similar to last year, 8 out of 10 say their audit lasted longer than they expected and over a third of those indicate it continued for 9 or more months past what they had originally assumed.

LBI Intl (2020) - Overall satisfaction in 2020 (3.28) is similar to 2019 (3.33) and top-two box remained strong at 56% and 53%, respectively. Taxpayers have been consistently rating Courtesy of their auditor most satisfactory (3.71 in 2020). Amount of time spent on exam (2.96); Length of exam process (2.98) and Explanation of how long the process would take (3.01) received the lowest satisfaction ratings. Compared to 2019 satisfaction is higher for Explanation provided on reason for the exam, Reasonableness of information asked to provide and Amount of time spent.

Actions Taken/Lessons Learned: LBI Domestic (2020) - To improve overall taxpayer experience, focus on certainty as identified by Leverage Analysis. Specifically, within improving certainty, ensuring IRS adheres to its own timelines provides the best opportunity to increase the level of satisfaction within the arena. Focus on Level of Certainty Opportunity Areas to Improve Satisfaction. Additionally, to improve outcomes that impact tax Certainty, focus on faster resolution of complex issues, reducing open or un-agreed issues, and on reducing time auditees spend on audit examinations.

LBI Intl (2020) - The highest impact improvements are How well the IRS communicates with taxpayers through the process, followed by Length of exam and Fairness of treatment. Exam process being too long was the most prevalent commentary. There is an opportunity to continue the upward trend since 2013 in

Explaining how long the process will take, capitalizing on how expectation management drives a positive customer experience. Increasing the percent of taxpayers whose exams take less than 10 months would most expand the number of satisfied taxpayers.

Control # and Name: CS-20-513 OCPO Industry Partners Survey 2020

Participants: ()

Data Collection Began: 7/2020 **Data Collection Ended:** 8/2020 **Burden Hours:**

Cost: \$ **Response Rate:** %

Purpose:

Findings:

Actions Taken/Lessons Learned:

Control # and Name: CS-20-514 - Cancelled

Participants: ()

Data Collection Began: 8/2020 **Data Collection Ended:** 9/2020 **Burden Hours:**

Cost: \$ **Response Rate:** %

Purpose:

Findings:

Actions Taken/Lessons Learned:

Control # and Name: CS-20-515 Tax Stats Website Customer Satisfaction Survey 2020

Participants: 745 (20,279)

Data Collection Began: 11/2020 **Data Collection Ended:** 11/2020 **Burden Hours:** 371

Cost: \$ 0 **Response Rate:** 3.2 %

Purpose: The survey was designed to learn how and how often the users of TaxStats were accessing the information available on TaxStats, and how the site could be improved to better meet the needs of these customers.

Findings: Most users are Tax Professionals; over half of the listserv-based respondents identified themselves as those that work with taxpayers/tax policy, 29% of respondents use Tax Stats monthly, 68.4% of respondents somewhat agreed or completely agreed that the data products available on Tax Stats were easy to use, 81.3% of respondents thought it was somewhat easy or very easy to find what they were looking for, the majority of respondents most frequently used Summary Statistical Tables (XLSX) (52.9%), followed by Microdata Files (CSV) (47.1%), the majority of respondents stated they wanted to see more Summary Statistical Tables (56.9%), followed by Microdata (51.7%) and Time Series Data (51.7%).

Actions Taken/Lessons Learned: Reviews of the comments revealed areas that could be improved or enhanced within TaxStats, as well as certain data sets that could be expanded upon. Additionally, analysis was done on the survey instrument itself, to reduce survey abandonment and increase the response rate.

Control # and Name: CS-20-516 Enrolled Agent Special Enrollment Examination

Participants: 18,611 (20,734)

Data Collection Began: 5/3/2021 **Data Collection Ended:** 2/28/2022 **Burden Hours:** 1,103

Cost: \$ 0 **Response Rate:** 90 %

Purpose: The Competency & Standards Department of the Return Preparer Office (RPO) provides oversight of the Special Enrollment Examination (SEE) for Enrolled Agent candidates. The RPO entered into contract with Prometric to develop and administer the SEE. A voluntary customer satisfaction survey offered at the end of the SEE serves several purposes. It allows RPO and Prometric to evaluate the candidate's perception of the testing process to improve the candidate experience. It allows RPO to measure customer satisfaction to assist with evaluating Prometric's performance consistent with contractual requirements. It provides information on test center locations in relation to distance traveled which is considered when new test centers are opened. It identifies improvement opportunities on an ongoing basis to improve the examination and candidate's experience with Prometric's website, call center, and test centers.

Findings: The response rate of this year's survey was ninety percent. Overall, ninety-eight percent of respondents were very satisfied or satisfied with their testing experience, which exceeds the contractual goal of ninety-five percent, but is a decrease from ninety-nine percent in the previous cycle. Due to the COVID-19 pandemic, test center seating followed governmental mandates and social distancing practices, which resulted in fewer testing appointments being available early in the testing cycle but did increase during the latter portion of the window, but still did not reach full capacity anytime during the cycle. The contractor was only able to administer a limited number of exams in five locations internationally. The impact of the pandemic was reflected in the survey responses. When candidates were asked how satisfied they were with appointment date/dates availability, the percentage dropped to eighty four percent, from eighty six percent during the previous testing window. Again, due to the global pandemic, several test centers were closed temporarily or permanently due to lack of staffing. When candidates were asked if there was a test center located within 100 miles of their home, the response went from ninety one percent in the previous cycle to eighty four percent. Availability of testing locations and testing appointments was an issue throughout the testing cycle.

Candidate satisfaction rates related to performance of the scheduling system, the test center staff's promptness and helpfulness during exam appointments and the number of breaks allowed during the exam remained consistent with the prior cycle.

Actions Taken/Lessons Learned: As we navigate through the pandemic, we will continue to follow international, federal, state and local guidelines, and make as many testing appointments available as possible while adhering to guidance and social distancing standards. We will ensure all public communications are updated regularly to reflect current status of test centers and appointment availability.

Control # and Name: CS-20-517 TAS Customer Survey

Participants: 12,583 (75,723)

Data Collection Began: 3/24/2021 **Data Collection Ended:** 12/10/2021 **Burden Hours:** 3,353

Cost: \$ 31,557 **Response Rate:** 17 %

Purpose: To measure the satisfaction of taxpayers who received assistance from the TAS in resolving their tax issues.

Findings: In FY 2021, TAS customers expressed an 82% level of satisfaction with the services they received. This is the same score as in FY 2020.

The highest rated survey questions are: Your advocate treated you with courtesy (89%), Your advocate listened to you (85%), Your advocate's explanation of what he or she would do to help you with your problem (84%), and Your advocate treated you fairly (84%).

Actions Taken/Lessons Learned: TAS expects the COVID-19 pandemic will affect our overall customer satisfaction due to the temporary closure of the toll-free intake line and IRS operations, which limited TAS operations', timeliness, and advocacy efforts. TAS continues to administer the customer satisfaction surveys to better understand the impact the pandemic has had on our taxpayers and identify ways we can improve our service and responsiveness. We will continue to issue customer satisfaction results at the office level.

TAS continues to use the Customer Satisfaction Advisory Board, a group of TAS analysts and managers, who provide input and recommendations regarding the overall process, reporting and the questions of the TAS Customer Satisfaction (CS) survey. This Advisory Board also helps with other Customer Satisfaction surveys administered by TAS.

Control # and Name: CS-21-518 LB&I Taxpayer Digital Communication (TDC) Customer Satisfaction Survey

Participants: 272 (700)

Data Collection Began: 5/10/2021 **Data Collection Ended:** 5/21/2021 **Burden Hours:** 25

Cost: \$ 0 **Response Rate:** 39 %

Purpose: To obtain feedback on the new Taxpayer Digital Communication technology.

Findings: The finding revealed that it was easy to set up their password to access the system (91.5%), taxpayers were not concerned about the privacy of the information being shared (93.3%) and that they

were satisfied with the support the IRS provided on the TDC system (88.5%), 66% were Very satisfied or Somewhat satisfied with the ease of use of the TDC system.

Actions Taken/Lessons Learned: The survey revealed that the communications regarding the security of the system was effective, and taxpayers rated the security of the system highly. Improvement ideas and barriers to the system were identified and the TDC team are considering the taxpayer feedback for action. As a follow up to this survey we are administering another TDC survey to taxpayers.

Control # and Name: CS-21-519 TAS Website Customer Satisfaction Survey

Participants: 100 (100)

Data Collection Began: 8/22/2021 **Data Collection Ended:** 8/27/2021 **Burden Hours:** 7

Cost: \$ 0 **Response Rate:** 100 %

Purpose: The Taxpayer Advocate Service (TAS) has made enhancements to a primary platform used for taxpayer education and outreach. The site is located at <http://www.taxpayeradvocate.irs.gov/>, known as the TAS website. The website is configured to function differently based on the user's device – mobile, desktop, or tablet configuration with an emphasis on being mobile-friendly. User testing will identify opportunities and continue to optimize user experience and prioritize new features. The main goal for this research initiative is to validate platform enhancements, make sure the sites are easily accessible, user-friendly, and meet the requirements of self-help content and creating a secure environment to help taxpayers feel more comfortable about interacting with TAS in a digital environment. Testing will be administered via screen prompts within the application and through a survey using a virtual form. The survey testing will prompt users to complete the survey after 60 seconds on a page or upon exiting the site. The survey will provide information from users in real time and will provide their comments and feedback on their experiences with accessing the site, why a user took certain actions, what they were looking for, what features they liked, and what frustrated them when trying to find specific information. Below are the findings for the surveys that were taken by users accessing the site.

Findings: Users were asked why they accessed the site, and more than half of respondents indicated their reason for visiting was to get help (either understanding a tax issue, or with an ongoing dispute). With the combination of responses, it seems that respondents are either currently experiencing a tax dispute and seeking assistance, or information available elsewhere is not sufficient to answer their questions. Another large population has received a letter from the IRS and came to the site based upon that. An overwhelming majority of respondents are coming to the site looking for help either via information directly on the website, or to contact TAS. The public is looking for understandable information on taxes on our site. They feel the "Get Help" menu does not provide clear and practical advice on what "next steps" are for taxpayers. Some find the site very confusing, they clicked on several links with more information and less contacts to request help; there tends to be too much digging to get needed information. Respondents are extremely dissatisfied with the level of phone service from the IRS and TAS. In fact, the lack of live phone interaction is a major issue with taxpayers. They either can't get through the phone lines to speak to a live person, or they are not receiving callbacks. Many commented they are waiting months (or never receive a call back) from TAS. In addition, there was a lot of frustration with accessing and downloading the Form 911; most are dissatisfied that the Form must be downloaded and either mailed or faxed, an online version which allowed submission online is needed.

Actions Taken/Lessons Learned: There seemed to be extreme dissatisfaction with the website, based on the responses. However, a further analysis of the responses (particularly the open-ended questions), indicates general frustration with the IRS and TAS; presumably targeted at the website. These responses should be compared to the same questions when there is a higher degree of satisfaction with TAS overall. Regarding the TAS website, there were two main suggestions: (1) allow submission of the Form 911 online or via email, and (2) make the get help section clearer. Beyond this, most of the responses were general complaints; either targeted toward TAS or the IRS. In fact, over 70 percent of the responses could be categorized as either general complaints (about the IRS or TAS) or problems with phone calls.

Control # and Name: CS-21-520 OCPO Industry Partners Survey 2021

Participants: 446 (13,979)

Data Collection Began: 7/2021 **Data Collection Ended:** 8/2021 **Burden Hours:** 607

Cost: \$ 1,460 **Response Rate:** 3.2 %

Purpose: To determine our contractors' satisfaction with the service provided by IRS Procurement and to look for opportunities to improve our service and engagement to them.

Findings: We found that 50% of the respondents were satisfied with the service provided by IRS Procurement, 11% were dissatisfied and 39% were neutral. A majority of the respondents indicated that IRS Procurement needs to provide awareness to new opportunities prior to solicitation release. In addition, we received 36 recommendations on ways to possibly reduce or eliminate certain barriers to conducting business with the IRS and 13 ideas on how to better promote opportunities, which will all be taken into consideration when conducting business with our vendors.

Actions Taken/Lessons Learned: The results of this survey were passed on to all our IRS Procurement managers for them to share with their employees and to discuss possible improvement opportunities especially in the areas of communication and timeliness.

Control # and Name: CS-21-521 CEEN Customer Satisfaction 2021

Participants: 3,759 (21,597)

Data Collection Began: 10/2021 **Data Collection Ended:** 1/2022 **Burden Hours:** 1,613

Cost: \$ 333,020 **Response Rate:** 17 %

Purpose: The overall objective of this task is to survey SB/SE taxpayers regarding their pre-filing, filing, and post-filing needs and preferences. The key goals of this research are to Solicit SB/SE taxpayer feedback on the various aspects of the taxpayer experience including satisfaction with IRS interactions and tax administration as a whole, Measure SB/SE taxpayer expectations for interactions with the IRS, Measure SB/SE taxpayer needs for compliant tax administration, and Measure SB/SE taxpayer awareness and use of IRS products and services.

Findings: Almost half of respondents (49%) were only self-employed or a small business owner, while 43% had one additional hourly/salaried job, and 8% had more than one hourly/salaried job outside of their own business. Nearly three-quarters of respondents (73%) had only one self-employment job or small business, and 21% had two or three. Of the 27% of respondents who paid employees or independent contractors in 2020, 42% used a payroll company. Respondents most often paid only employees (41%) or mostly employees and some independent contractors (26%). Another 24% only paid independent contractors, and 9% paid mostly independent contractors and some employees.

Actions Taken/Lessons Learned: ICF conducted 6 focus groups from April 8 through April 15 over the phone including questions on: Participant Self-Employment, General Knowledge of Tax Responsibilities, Specific Areas of SB/SE Tax Knowledge, and Attitudes & Beliefs on IRS Topics.

Control # and Name: CS-21-522 TAS Digital Customer Satisfaction Survey Pilot

Participants: ()

Data Collection Began: 5/2022 **Data Collection Ended:** 9/2022 **Burden Hours:**

Cost: \$ **Response Rate:** %

Purpose:

Findings:

Actions Taken/Lessons Learned:

Control # and Name: CS-21-523 TAS Customer Satisfaction Paper Survey

Participants: ()

Data Collection Began: 12/2021 **Data Collection Ended:** 1/2022 **Burden Hours:**

Cost: \$ **Response Rate:** %

Purpose:

Findings:

Actions Taken/Lessons Learned:

Control # and Name: CS-21-524 Enrolled Agent Special Enrollment Exam

Participants: ()

Data Collection Began: 5/2022 **Data Collection Ended:** 2/2023 **Burden Hours:**

Cost: \$ **Response Rate:** %

Purpose:

Findings:

Actions Taken/Lessons Learned:

Control # and Name: CS-21-525 RPO Customer Satisfaction Survey

Participants: ()

Data Collection Began: 12/2021 **Data Collection Ended:** 6/2022 **Burden Hours:**

Cost: \$ **Response Rate:** %

Purpose:

Findings:

Actions Taken/Lessons Learned:

Control # and Name: CS-22-526 TEGE Outreach and Education Customer Satisfaction Survey

Participants: ()

Data Collection Began: 10/2022 **Data Collection Ended:** 10/2025 **Burden Hours:**

Cost: \$ **Response Rate:** %

Purpose:

Findings:

Actions Taken/Lessons Learned:

Control # and Name: CS-22-527 Customer Call Back Survey

Participants: ()

Data Collection Began: 6/2022 **Data Collection Ended:** 5/2023 **Burden Hours:**

Cost: \$ **Response Rate:** %

Purpose:

Findings:

Actions Taken/Lessons Learned:

Control # and Name: CS-22-528 PCA Survey

Participants: ()

Data Collection Began: 4/1/2022 **Data Collection Ended:** 3/31/2024 **Burden Hours:**

Cost: \$ **Response Rate:** %

Purpose:

Findings:

Actions Taken/Lessons Learned:

Control # and Name: CS-22-529 Field Assistance Taxpayer Experience Day Online Survey

Participants: ()

Data Collection Began: 4/9/2022 **Data Collection Ended:** 5/14/2022 **Burden Hours:**

Cost: \$ **Response Rate:** %

Purpose:

Findings:

Actions Taken/Lessons Learned:

Control # and Name: CS-22-530 CEEN 2022 Survey

Participants: ()

Data Collection Began: 4/1/2022 **Data Collection Ended:** 9/27/2025 **Burden Hours:**

Cost: \$ **Response Rate:** %

Purpose:

Findings:

Actions Taken/Lessons Learned:

Control # and Name: CS-22-531 2022 LB&I Taxpayer Digital Communication (TDC) Customer Satisfaction Survey

Participants: ()

Data Collection Began: 5/1/2022

Data Collection Ended: 5/31/2022

Burden Hours:

Cost: \$ **Response Rate:** %

Purpose:

Findings:

Actions Taken/Lessons Learned: