

SUPPORTING STATEMENT B
Internal Revenue Service (IRS)
Statistics of Income Division
Voluntary Customer Surveys to Implement E.O. 12862 Coordinated by the Corporate Planning and
Performance Division on Behalf of All IRS Operations Functions
September 2025 through August 2028

OMB Control Number 1545-1432

Collections of Information Employing Statistical Methods.

1. UNIVERSE AND RESPONDENT SELECTION

Surveys covered under this clearance will vary greatly with regard to universe and respondent selection. Some surveys will represent respondents selected from a comprehensive range of IRS functions and activities or customer characteristics related to many products or services. Other surveys will represent respondents selected from an extremely limited range of IRS functions and activities or customer characteristics related to narrowly defined products or services.

Response rates to these voluntary customer surveys are also expected to vary greatly. For example, during the current three-year approval period, response rates varied from less than 4% for an emailed invite to an online survey to 90% for Enrolled Agent Special Enrollment Exam surveys given online immediately after use of a system. These response rates are similar to the response rates we received in the prior three years. This level of response is typical for IRS customer surveys and is considered adequate for making product and service improvement decisions. Non-response follow-up efforts are usually, but not always, employed. No follow-up is attempted if a customer fails to return a questionnaire following an in-office contact where the customer agreed to participate. However, non-response follow-up efforts, when employed, help ensure that a sufficient number of respondents are represented, and that non-response bias is minimized.

2. PROCEDURES FOR COLLECTING INFORMATION

Surveys

Limited information from IRS customers, as well as users and potential users of new IRS technology will be collected using self-administered mail surveys, telephone surveys, or electronic surveys of users of interactive applications. Respondents will be advised of the purpose of the survey and its voluntary nature via a cover letter or advance letter in the case of a telephone survey or in an email or as part of the survey introduction in the case of electronic surveys.

All respondents will be provided with an address to offer comments concerning the data collection process and the Office of Management and Budget (OMB) control number.

3. METHODS TO MAXIMIZE RESPONSE

In an effort to enhance response rates, questionnaires are tested or reviewed to ensure that the questions and instructions are clear, relevant, and unambiguous. Surveys employing non-response follow-up will require multiple contacts by telephone and/or additional mailings of the questionnaire to ensure an adequate response.

4. TESTING PROCEDURES

IRS employees who are familiar with the product or service under investigation review the questionnaires used in the surveys. In some cases, questionnaires may be pre-tested on up to nine external customers.

5. CONTACT FOR STATISTICAL ASPECTS AND DATA COLLECTION

Questions regarding any statistical aspects employed or data procedures used, or for administrative questions regarding the IRS use of this generic clearance should be directed to:

Timothy S. Castle
Internal Revenue Service
Statistics of Income Division
77 K Street, NE
Washington, DC 20002
(202) 803-9106