

**Request for Approval under the “Clearance for Business Unit Continuous
Annual Customer Satisfaction Surveys” (OMB Control Number: 1545-1432)**
**TITLE OF INFORMATION COLLECTION: Media and Publications (M&P) – Customer
Satisfaction (CSAT) Surveys**
Taxpayer Services (TS) Division -Tax Return Preparers

PURPOSE:

BACKGROUND: The mission of the IRS is to provide America’s taxpayers with top-quality service by helping them understand and meet their tax obligations and by applying the tax law with integrity and fairness to all. To promote this mission, one IRS strategic goal is to “improve service to make voluntary compliance easier.” Key to continuous progress towards this goal is the capacity to measure the current state of taxpayer service, track changing taxpayer service expectations and the extent to which they are being met, identify critical taxpayer issues and service deficiencies, and take effective action to address and improve services.

There are four customer segments of M&P CSAT surveys. This request for renewed OMB approval specifically addresses one of the four customer segments: Tax Return Preparers.

Surveys measure external customer satisfaction with its products and services to ensure taxpayers’ access to federal tax forms, publications, and instructions to meet their obligations under Federal tax laws. Feedback from external surveys is critical for assessing customers’ perception of IRS tax products and services and to help identify, as early as possible, areas/processes that require intervention and improvement.

DESCRIPTION OF RESPONDENTS:

The IRS provides the lists of potential respondents to the contractor. This list of potential Tax Return Preparers will be pulled from the IRS Compliance Data Warehouse (CDW). Only names and mailing addresses will be provided to the contractor. Those with invalid mailing addresses, international or military addresses, are deceased, and duplicate records are excluded from the sample.

TYPE OF COLLECTION: (Check one)

- | | |
|---|--|
| ☐ Customer Comment Card/Complaint Form | ☒ Customer Satisfaction Survey |
| ☐ Usability Testing (e.g., Website or Software | ☐ Small Discussion Group |
| ☐ Focus Group | ☐ 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: Shankivia Daugherty

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, is the information that will be collected included in records that are subject to the Privacy Act of 1974? ☒ Yes ☐ No
3. If Applicable, has a System or Records Notice 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 – (PCG)

Category of Respondent	No. of Respondents	Participation Time	Burden Hours
Tax Return Preparers	600	15 min	150

Estimated Response Rate:

Tax Return Preparers: 11%

Amount Expected to Be Completed Electronically:

Tax Return Preparers: 43%

Total Burden Estimate: 150

Estimated annual cost for the contractor to administer the Media & Publications Customer Satisfaction Surveys is \$15,342.17.

STATISTICAL METHOD:

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?

The IRS provides the lists of potential respondents to the contractor. This list of potential Tax Return Preparers will be pulled from the IRS Compliance Data Warehouse (CDW). Only names and mailing addresses will be provided to the contractor. Those with invalid mailing addresses, international or military addresses, are deceased, and duplicate records are excluded from the sample.

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 – Microsoft TEAMS or ZOOM for sharing visuals.

2. Will interviewers or facilitators be used? ☐ Yes ☒ No

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

