Request for Approval under the "Generic Clearance for the Collection of Routine Customer Feedback" (OMB Control Number: 1545-1432)

TITLE OF INFORMATION COLLECTION: Taxpayer Experience Survey

PURPOSE:

The overall objective of this task is to administer the English and Spanish versions of the Taxpayer Experience Survey to survey customers regarding their pre-filing, filing, and post-filing experiences, needs, and preferences. The key goals of this research are: 1. To determine pre-filing, filing, and post-filing experiences, needs, and preferences 2. To identify service needs of Taxpayer Services taxpayers

DESCRIPTION OF RESPONDENTS:

Taxpayer Services taxpayers

TYPE OF COLLECTION: (Check one)

[ ] Customer Comment Card/Complaint Form   [**X**] Customer Satisfaction Survey
[ ] Usability Testing (e.g., Website or Software   [ ] Small Discussion Group
[ ] Focus Group   [**]** Other: **Cognitive Interviews**

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 <u>not</u> raise issues of concern to other federal agencies.
4. The results are <u>not</u> intended to be disseminated to the public.
5. Information gathered will not be used for the purpose of <u>substantially</u> informing <u>influential</u> 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: _David Swafford_____

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

Personally Identifiable Information:
1. Is personally identifiable information (PII) collected? [ ] Yes [**X**] 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? [**X]** Yes [ ] No

The incentive for AmeriSpeak panelists is $7, but the incentive for third-party non-probability source panelists; to reach additional Spanish LEP respondents, is unknown as this is proprietary information.

BURDEN HOURS

Category of Respondent	Number of Respondents	Participation Time	Burden Hours
Individuals or Households Recruitment Screening – Non-participants	6,163	0 minutes	0
Individuals or Households Recruitment Screening – Qualified Participants	4,774	20 minutes	1,591
Total Burden			**1,591**

FEDERAL COST: $235,000.

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?
                                                            [**X**] 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?

Participants are selected from NORC at the University of Chicago's (the subcontractor) existing AmeriSpeak Panel, which is a nationally representative panel of volunteers who have already agreed to participate in research. NORC notifies participants of the opportunity. The participants decide which surveys they will join.

Administration of the Instrument
1. How will you collect the information? (Check all that apply)
        [**X**] Web-based or other forms of Social Media
        [ ] Telephone
        [ ] In-person
        [ ] Mail

[ ] Other, Explain – Microsoft TEAMS for sharing visuals and conducting the interviews

2. Will interviewers or facilitators be used? [ ] Yes [**X**] No

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