Request for Approval under the "Generic Clearance for Improving Customer Experience: OMB Circular A-11, Section 280 Implementation" (OMB Control Number: 1545-2290)

TITLE OF INFORMATION COLLECTION:
IRS Enterprise Interactive Voice Response (IVR) Customer Experience Survey: Reported

PURPOSE:

IRS customer experience survey efforts are a direct result of Executive Order (EO) 12862 of 1993 requiring government agencies to gather constituents' feedback for incorporation into process improvements. Collecting feedback from taxpayer customers is also part of the Service-wide effort to maintain a system of balanced organizational performance measures as mandated by the Internal Revenue Service (IRS) Restructuring and Reform Act (RRA) of 1998. The balanced measures include business results, employee satisfaction and customer satisfaction.

On June of 2018, the Office of Management and Budget (OMB) released a modification to Circular A-11. Section 280 to explain how federal agencies should manage customer experience improvement programs. Specifically titled "Managing Customer Experience and Improving Service Delivery," section 280 was created to support a customer experience culture in the federal government, provide a common framework for approaching and measuring customer experience, encourage federal agencies to apply leading private sector practices and improve customer satisfaction with federal service delivery.

In the interest of asserting greater control over the research process while conserving resources, the customer experience survey will include eight questions designed to meet OMB A-11-Section 280 requirements and allow for reporting of IRS Balanced Measures according to 26 Code of Federal Regulations (CFR) 801.

Utilizing an Interactive Voice Response (IVR), the customer experience survey will capture feedback from customers across three phone lines:

1. Taxpayer Assistance Center (TAC) Appointment Line
2. Tax Law and Accounts Line (TLA) a.k.a. Toll Free
3. Automated Collection Systems (ACS)

This agency-wide initiative to monitor and improve the services provided through IRS toll-free channels and improve the overall caller experience.

The IRS Interactive Voice Response Customer Experience Survey will be administered continuously across all five phone lines for a period of three years.

DESCRIPTION OF RESPONDENTS:

Respondents for this survey are customers who use one of the following three IRS phone lines:

1. Taxpayer Assistance Center (TAC) Appointment Line
2. Tax Law and Accounts Line (TLA) a.k.a. Toll Free

3. Automated Collection Systems (ACS)

The IRS phone system randomly prompts the customer service representative (CSR) working with the customer to offer the Enterprise Interactive Voice Response (IVR) Customer Experience Survey. The survey is an interactive voice recognition survey and is administered through software within the phone system.

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:

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: Howard Rasey

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

Personally Identifiable Information:
1. Is personally identifiable information (PII) collected? [**X**] Yes [ ] No
2. If Yes, is the information that will be collected included in records that are subject to the Privacy Act of 1974? [**X**] Yes [ ] No
3. If Applicable, has a System or Records Notice been published? [**X**] Yes [ ] No

Gifts or Payments:
Is an incentive (e.g., money or reimbursement of expenses, token of appreciation) provided to participants? [ ] Yes [**X**] No

BURDEN HOURS

The total burden hours per year for the survey is = **5,750 burden hours**

The total burden hours for three years of survey administration is = **17,250 burden hours**

Respondent Category	Number of	Participation	Burden

	Respondents	Time	Hours
Listening to survey invitation	600,000	.5 minutes	5,000 h
Survey participation	15,000	3 minutes	750 h
Total Burden			**5,750 h**

FEDERAL COST:

The total estimated cost is $63,515.

Description	Hrs./Yr	Avg. Hourly Rate[1]	Yearly Cost
GS-15 Survey Programing	36	$70.19	$2,527
GS-15 Survey Maintenance	4.5	$70.19	$316
GS-13 Project Lead	528	$50.49	$26,659
GS-11 Project Analyst	960	$35.43	$34,013
Totals	**1,528.5**		**$63,515**

[1] 2025 General Schedule (Rest of United States), Step 1

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?

   The universe of potential respondents will be randomly selected from the total population of customer calls resulting in an interaction with a Customer Service Representative (CSR), from the following IRS toll-free phone lines:

   1. Taxpayer Assistance Center (TAC) Appointment Line
   2. Tax Law and Accounts Line (TLA) a.k.a. Toll Free
   3. Automated Collection Systems (ACS)

   Each business day, toll-free calls will be randomly selected for each line by the IRS call center software. At the end of the service interaction, the CSR will invite sampled callers to participate in the survey. If caller give consent, the CSR transfers them to the IRS Enterprise Interactive Voice Response system in which the survey is conducted.

A sampling frame will be established for phone line at each call center based on the estimated quarterly case volumes.

Administration of the Instrument

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

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

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

NOTE: included in a separate attachment.