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: Taxpayer Assistance Center (TAC) Web Service Delivery (WebSD) Survey

PURPOSE OF COLLECTION:
What are you hoping to learn / improve? How do you plan to use what you learn? Are there artifacts (user personas, journey maps, digital roadmaps, summary of customer insights to inform service improvements, performance dashboards) the data from this collection will feed?

The purpose of this collection is to determine taxpayers' experiences and level of satisfaction with the tax services they received during TAC Web Service Delivery (WebSD) appointments. Feedback about the services provided will be used to help improve IRS tax service to the public.

TYPE OF ACTIVITY: (Check one)

☐ Customer Research (Interview, Focus Groups, Surveys)
☒ Customer Feedback Survey
☐ Usability Testing of Products or Services

ACTIVITY DETAILS

1. If this is a survey, will the results of this survey be reported to Touchpoints as part of quarterly reporting obligations specified in OMB Circular A-11 Section 280?
   ☒ Yes
   ☐ No
   ☐ Not a survey

2. How will you collect the information? (Check all that apply)
   ☒ Web-based or other forms of Social Media
   ☐ Telephone
   ☐ In-person
   ☐ Mail
   ☐ Other, Explain

3. Who will you collect the information from?
Explain who will be interviewed and why the group is appropriate for the Federal program / service to connect with. Please provide a description of how you plan to identify your potential group of respondents and if only a sample will be solicited for feedback, how you will select them(e.g., anyone who provided an email address to a call center rep, a representative sample of Veterans who received outpatient services in May 2019, do you

have a list of customers to reach out to (e.g., a CRM database that has the contact information, intercept interviews at a particular field office?)

Information will be collected from all taxpayers nationwide who complete a TAC WebSD appointment for tax assistance. The data will provide taxpayer feedback and level of satisfaction with the services they received.

The Survey Designer feature in Field Assistance Scheduling Tool (FAST) allows for the configuration of survey triggers which specifies when the survey invitation is issued to the taxpayer.

4. How will you ask a respondent to provide this information? *(e.g., after an application is submitted online, the final screen will present the opportunity to provide feedback by presenting a link to a feedback form / an actual feedback form)*

TAC WebSD users will be asked to provide feedback at the end of service. If taxpayers opted in for receipt of email notifications, FAST will automatically generate an email to the taxpayer requesting their participation in the survey.

If taxpayers opt in to receive text message notifications, FAST can deliver a text message to the taxpayer requesting participation in the survey with a link to the survey.

QR codes can also be configured for display in the TACs, provided it is located somewhere that does not have a prohibition on camera use. This will be contingent on FMSS coordination and privacy policies.

5. What will the activity look like?
Describe the information collection activity – e.g. what happens when a person agrees to participate? Will facilitators or interviewers be used? What's the format of the interview/focus group? If a survey, describe the overall survey layout/length/other details? If User Testing, what actions will you observe / how will you have respondents interact with a product you need feedback on?

The survey consists of 12 questions—one of which is open-ended. Two questions have a skip pattern depending on the response to a previous question. All questions are optional, and responses are collected and reported in aggregate.

When a person agrees to participate in the survey, they will be directed to the digital survey via their web browser on their preferred device. Survey responses are stored in the metric results table within FAST. The metric result table within the application acts as the data source where results can be viewed and analyzed.
FAST is housed on ServiceNow's FedRAMP High Government Community Cloud.

6. Please provide your question list.

Paste here the questions or prompts presented to participants in your activity. If you have an interview / facilitator guide, that can be attached to the submission and referenced here.

A copy of the survey is included with the OMB application.

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

7. When will the activity happen?
   Describe the time frame or number of events that will occur (e.g., We will conduct focus groups on May 13,14,15, We plan to conduct customer intercept interviews over the course of the Summer at the field offices identified in response to #2 based on scheduling logistics concluding by Sept. 10th, or "This survey will remain on our website in alignment with the timing of the overall clearance.")

   This is an ongoing continuous survey.

8. Is an incentive (e.g., money or reimbursement of expenses, token of appreciation) provided to participants?
   ☐ Yes ☒ No

   If Yes, describe:

BURDEN HOURS

Category of Respondent	No. of Respondents	Participation Time	Burden Hours
Individual Non-respondents	1800	1	30
Individual Respondents	9600	5	800
Totals	**11400**		**830**

CERTIFICATION:

I certify the following to be true:

1. The collections are voluntary;
2. The collections are low-burden for respondents (based on considerations of total burden hours or burden-hours per respondent) and are low-cost for both the respondents and the Federal Government;
3. The collections are non-controversial;
4. Any 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 near future;
5. Personally identifiable information (PII) is collected only to the extent necessary and is not retained;
6. Information gathered is intended to be used for general service improvement and program management purposes
7. The agency will follow the procedures specified in OMB Circular A-11 Section 280 for the required quarterly reporting to OMB of trust data and experience driver data from surveys.
8. Outside of the quarterly reporting mentioned in the bullet immediately above, if the agency intends to release journey maps, user personas, reports, or other data-related summaries stemming from this collection, the agency must include appropriate caveats around those summaries, noting that conclusions should not be generalized beyond the sample, considering the sample size and response rates. The agency must submit the data summary itself (e.g., the report) and the caveat language mentioned above to OMB before it releases them outside the agency. OMB will engage in a pass-back process with the agency.

Name and email address of person who developed this survey/focus group/interview:

Name: Shemeshua Roberts, Program Manager

Email address: Shemeshua.M.Roberts@irs.gov

All instruments used to collect information must include:
OMB Control No. 1545-2290
Expiration Date: December 31, 2026

HELP SHEET
(OMB Control Number:1545-2290)

TITLE OF INFORMATION COLLECTION: Provide the name of the collection that is the subject of the request. (e.g. Comment card for soliciting feedback on…)

PURPOSE: Provide a brief description of the purpose of this collection and how it will be used. If this is part of a larger study or effort, please include this in your explanation.

TYPE OF COLLECTION: Check one box. If you are requesting approval of other instruments under the generic, you must complete a form for each instrument.

CERTIFICATION: Please read the certification carefully. If you incorrectly certify, the collection will be returned as improperly submitted or it will be disapproved.

Personally Identifiable Information: Agencies should only collect PII to the extent necessary, and they should only retain PII for the period of time that is necessary to achieve a specific objective.

BURDEN HOURS:
Category of Respondents: Identify who you expect the respondents to be in terms of the following categories: (1) Individuals or Households;(2) Private Sector; (3) State, local, or tribal governments; or (4) Federal Government. Only one type of respondent can be selected per row.
No. of Respondents: Provide an estimate of the Number of respondents.
Participation Time: Provide an estimate of the amount of time required for a respondent to participate (e.g. fill out a survey or participate in a focus group)
Burden: Provide the Annual burden hours: Multiply the Number of responses and the participation time and divide by 60.