

IRS PERFORMANCE REPORT

Goal 1: Improve Service to Make Voluntary Compliance Easier

PERFORMANCE MEASURES	FY2011 ACTUAL	FY2012 PLAN	FY2012 ACTUAL	FY2013 PLAN
GOAL 1: IMPROVE SERVICE TO MAKE VOLUNTARY COMPLIANCE EASIER				
Accounts Management Customer Satisfaction (Adjustments)	63.0%	65.0%	65.0%	65.0%
Automated Underreporter Telephone Level of Service	78.3%	78/0%	78.0%	78.0%
Correspondence Error Rate With Systemic Errors	4.5%	5.1%	4.4%	5.0%
Cost Per Taxpayer Served – Health Coverage Tax Credit	\$12.36	\$13.00	\$14.43	\$13.00
Customer Accuracy – Accounts Phones	96.0%	95.0%	95.6%	95.0%
Customer Accuracy – Tax Law Phones	93.4%	92.7%	93.2%	92.7%
Customer Contacts Resolved Per Staff Year	12,419	13,300	16,320	17,167
Customer Service Representative Level Of Service	70.1%	61.0%	67.6%	70.0%
Deposit Error Rate - Combined	0.6%	1.0%	0.3%	1.0%
Employee Plans Determination Letters Timeliness - # Days	370	318	367	490
Exempt Organizations Determination Customer Satisfaction	74.0%	74.0%	72.0%	74.0%
Exempt Organizations Determination Letters Timeliness - # Days	104	141	137	137
Percent Of Business Returns Processed Electronically	31.8%	32.0%	36.7%	34.0%
Percent Of Individual Returns Processed Electronically	76.9%	79.0%	80.5%	80.0%
Practitioner Toll-Free Customer Satisfaction	90.0%	80.0%	86.0%	80.0%
Primary Abandoned Call Rate ¹	18.3%	NA	18.7%	NA
Refund Timeliness – Individual (Paper)	99.4%	98.0%	99.7%	98.0%
Secondary Abandoned Call Rate ²	24.1%	NA	26.9%	NA
Sign-Up Time – Health Coverage Tax Credit - # Days	117.0	125.0	116.0	125.0
Taxpayer Self Assistance Rate	70.1%	72.2%	78.5%	79.6%
Timeliness Of Critical Individual Filing Season Tax Products To The Public	96.3%	95.0%	97.2%	95.0%
Timeliness Of Critical Tax Exempt/Government Entities & Business Tax Products To The Public	96.4%	93.0%	94.5	95.0%
W&I Average Wait Time On Hold (In Seconds) Average Speed To Answer	779	1,129	1,001	1,204

SOURCE: IRS

¹ IRS does not set target goals for the Primary Abandoned Call Rate measure.

² IRS does not set target goals for the Secondary Abandoned Call Rate measure.

Definitions of Performance Measures by IRS Strategic Goal

Performance Measures for Strategic Goal 1: Improve Service to Make Voluntary Compliance Easier	
Performance Measure	Definition
Accounts Management Customer Satisfaction (Adjustments)	Total percentage of top ratings given by taxpayers on the Adjustment Customer Satisfaction Survey question rating overall satisfaction. The taxpayer is asked, "Regardless of whether you agree or disagree with the final outcome, how would you rate your overall satisfaction with the way your issue was handled?"
Automated Underreporter Telephone Level Of Service	The percentage of Automated Underreporter phone calls answered by a tax examiner as a percentage of the total calls attempted.
Correspondence Error Rate With Systemic Errors	The percentage of incorrect Submission Processing Masterfile notices and letters issued to taxpayers.
Cost Per Taxpayer Served – Health Coverage Tax Credit	The costs associated with serving the taxpayers including program kit correspondence, registration, and program participation.
Customer Accuracy – Accounts Phones	The percentage of correct answers given by a live assistor on Toll-free account inquiries.
Customer Accuracy – Tax Law Phones	The percentage of correct answers given by a live assistor on Toll-free tax law inquiries.
Customer Contacts Resolved Per Staff Year	The number of Customer Contacts resolved in relation to staff years expended.
Customer Service Representative Level Of Service	The number of toll free callers that either speak to a Customer Service Representative or receive informational messages divided by the total number of attempted calls.
Deposit Error Rate - Combined	The percentage of errors made by Submission Processing during remittance processing. These errors result in the inaccurate processing of data and may have a negative impact on the taxpayer.
Employee Plans Determination Letters Timeliness - # Days	Average number of days to process an application requesting qualified status from the earlier of the postmark date or the received date to the date a determination letter is issued to the requesting plan.
Exempt Organizations Determination Customer Satisfaction	The percentage of Exempt Organizations determination customers expressing top ratings on a transactional survey where respondents rate IRS performance.
Exempt Organizations Determination Letters Timeliness - # Days	Average number of days to process an application requesting tax-exempt status from the earlier of the postmark date or the received date to the date a determination letter is issued to the requesting organization.
Percent Of Business Returns Processed Electronically	The percentage of electronically filed business tax returns divided by the total business returns filed.
Percent Of Individual Returns Processed Electronically	The percentage of electronically filed individual tax returns divided by the total individual returns filed.

Percent Individual Returns Processed Electronically	The percentage of electronically filed individual tax returns divided by the total individual returns filed.
Percent of BSM Projects within +/- 10% Cost Variance	The percentage of BSM projects that are within the +/-10% threshold for cost. The cost variance is measured from the initial cost estimate versus current cost estimate.
Practitioner Toll-Free Customer Satisfaction	Total percentage of top ratings given by taxpayers on the Customer Satisfaction Survey question rating overall satisfaction. The taxpayer is asked, "Everything considered, rate your overall satisfaction with the service you received during this call."
Primary Abandoned Call Rate	The percentage of callers who abandon in the phone network before reaching an IRS system.
Refund Timeliness - Individual (Paper)	The percentage of refunds resulting from processing Individual Master File paper returns issued within 40 days or less.
Secondary Abandoned Call Rate	The percentage of callers who abandon in the assistor queue.
Sign-Up Time – Health Coverage Tax Credit - # Days	The length of time between the first program kit mailing and first payment received.
Taxpayer Self Assistance Rate	The percentage of taxpayer assistance requests resolved using self-assisted automated services.
Timeliness Of Critical Individual Filing Season Tax Products To The Public	The percentage of critical individual filing season tax products available to the public in a timely fashion.
Timeliness Of Critical Tax Exempt/Government Entities & Business Tax Products To The Public	Percentage of critical tax-exempt/government entities and business tax products, paper and electronic, available to the public in a timely fashion.
W&I Average Wait Time On Hold (In Seconds) Average Speed to Answer	The average number of seconds customers waited in an assistor queue before receiving service.