



## Treasury Inspector General for Tax Administration

### **TOLL-FREE ACCESS FOR THE 2007 FILING SEASON WAS EFFECTIVE, BUT THE QUALITY AND LEVEL OF CUSTOMER SERVICE FOR SPANISH-SPEAKING TAXPAYERS COULD BE IMPROVED**

Issued on August 31, 2007

## Highlights

Highlights of Report Number: 2007-40-160 to the Internal Revenue Service Commissioner for the Wage and Investment Division.

### **IMPACT ON TAXPAYERS**

The Internal Revenue Service (IRS) provided taxpayers with effective access to its toll-free telephone system during the 2007 Filing Season. However, the quality and level of customer service for Spanish applications were lower than those provided for English applications. In addition, the next time the IRS uses a recorded message to provide information to taxpayers, it could improve customer service by adding the option of returning to the main menu, if adequate system capacity exists.

### **WHY TIGTA DID THE AUDIT**

Each year, millions of taxpayers contact the IRS seeking assistance in understanding the tax law and meeting their tax obligations by calling the various Customer Account Services Toll-Free telephone assistance lines. The objective of the audit was to evaluate the customer service toll-free telephone access during the 2007 Filing Season.

### **WHAT TIGTA FOUND**

The IRS planned and met the 2007 Filing Season toll-free performance measurement goals of 81.6 percent Level of Service and 258 seconds Average Speed of Answer. In preparation for the 2007 Filing Season, the IRS planned for 16.1 million calls to assistors and 18.4 million calls to the automated lines (an increase over the last filing season). It expected this increase to result from taxpayers calling the toll-free assistance lines to ask about the Telephone Excise Tax Refund (TETR). The TETR is a one-time refund, available on the 2006 Federal income tax return, designed to refund previously collected long-distance Federal excise taxes. However, the expected number of TETR calls did not materialize.

The IRS also planned to provide approximately 1.1 million more toll-free telephone assistor services.

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Toll-free assistors answered only 29,095 TETR calls during the 2007 Filing Season, or less than 2 percent of the 2.3 million TETR calls expected. However, they were able to answer an additional 700,000 (5 percent) more non-TETR calls than planned. When the expected volume of TETR calls did not materialize, the Customer Account Services function used the additional resources to provide a higher Level of Service than planned and transferred more experienced assistors to work taxpayer correspondence.

The IRS provides toll-free telephone service to Spanish-speaking taxpayers by using assistors in designated call sites responsible for the Spanish applications. For the 2007 Filing Season, calls in the Spanish applications were abandoned at a rate of 21 percent, while calls in the English applications were abandoned at a rate of 13 percent. In addition, the accuracy rate for answers provided for the Spanish applications was lower than that for the English applications. The Average Speed of Answer performance measure and other workload indicators for Spanish applications for the 2007 Filing Season were also higher than those for English applications. This trend has occurred for the last four filing seasons.

Finally, to help minimize assistors' time answering TETR-related questions, the IRS provided taxpayers the option of hearing an automated message about the TETR. After the recording ended, callers were not returned to the main menu so they could make another selection or speak with an assistor; instead, the calls were ended. TIGTA believes callers should be given the option to return to the main menu, which provides better taxpayer service and is common practice on customer service telephone lines.

### **WHAT TIGTA RECOMMENDED**

The Commissioner, Wage and Investment Division, should (1) monitor the performance for the Spanish applications and take appropriate corrective actions if performance does not improve and (2) ensure taxpayers have the option of returning to the main menu the next time the IRS uses a recorded message to provide information to taxpayers, if adequate system capacity exists.

In their response to the report, IRS officials stated they agreed with both recommendations. They plan to continue monitoring performance on the Spanish applications and to take appropriate actions as needed. Also, if and when another recorded message is needed, they plan to ensure taxpayers have the option of returning to the main menu, if adequate system capacity exists.

### **READ THE FULL REPORT**

To view the report, including the scope, methodology, and full IRS response, go to:

<http://www.treas.gov/tigta/auditreports/2007reports/200740160fr.pdf>.

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