

25-Apr-24

## IRS Data Book Table 9

### Selected Online Taxpayer Assistance, by Type of Assistance, Fiscal Year 2023

Type of assistance or program	Number or percentage
<b>Enterprise telephone assistance, total [1]</b>	<b>46,998,147</b>
Automated	19,740,396
Live	27,257,751
Enterprise telephone level of service (percentage) [2]	51.3
Average speed of answer for live telephone assistance (minutes)	13.3
<b>Customer Service Representative toll-free telephone assistance, total [3]</b>	<b>36,075,724</b>
Automated	18,141,028
Live	17,934,696
Customer Service Representative level of service (percentage) [4]	51.8
Customer Service Representative level of service with automation (percentage) [5]	66.4
Average speed of answer for live toll-free telephone assistance (minutes)	10.1
Tax/Law & Accounts Interactive Voice Response Survey satisfaction rate (percentage) [6]	88.0
Toll-free assistance Trust Score [7]	80.0
<b>Taxpayer Assistance Center contacts [8]</b>	<b>1,602,401</b>
<b>Accuracy of toll-free telephone assistance:</b>	
Tax law questions (percent accurate)	91.4
Account questions (percent accurate)	89.2
<b>Taxpayer correspondence:</b>	
Total correspondence and amended returns closed [9]	11,673,100
Correspondence customer satisfaction rate (percentage) [10]	61.0
<b>Forms and publications (paper products):</b>	
Orders for forms, publications, and other paper products	1,161,329
Number of non-IRS outlets stocking paper products [11]	6,433
<b>Disaster and emergency assistance:</b>	
Disaster incidents:	
Federally declared incidents [12]	35
Areas qualifying for relief [13]	750
Taxpayers assisted:	
Number of toll-free disaster hotline calls	41,193
<b>Taxpayer education and tax return preparation for individual taxpayers:</b>	
Federal returns prepared through Volunteer Income Tax Assistance and Tax Counseling for the Elderly programs	2,561,165
Volunteers assisting in taxpayer education and return preparation programs	67,476
Volunteer Tax Preparation Assistance sites	8,822
Volunteer Income Tax Assistance and Tax Counseling for the Elderly (percent accurate) [14]	97.3
<b>Identity Protection Personal Identification Numbers issued [15]</b>	<b>8,100,000</b>
<b>Taxpayer outreach for small business and self-employed taxpayers:</b>	
Number of events [16]	804
Number of participants	140,927
Electronic newsletter subscriptions:	
Number targeted to small business owners	494,494
Number targeted to payroll providers	166,897
Number targeted to tax professionals:	
<i>e-News for Tax Pros</i>	473,836
<i>IRS Outreach Connection</i>	156,443

[1] Includes calls answered across the Service, including telephone lines serving individuals, small business/self-employed, large business and international, and tax-exempt and government entities.

[2] The Enterprise level of service measures the relative success rate of taxpayers calling to speak with an IRS assistor.

[3] Includes calls answered by Accounts Management (AM) Customer Service Representatives (CSRs) and automated calls. These telephone lines serviced 77 percent of all telephone traffic in Fiscal Year (FY) 2023. These lines are included in the Enterprise Telephone assistance volumes above.

[4] The CSR level of service measures the relative success rate of taxpayers calling to speak with a CSR. The CSR level of service includes telephone lines answered by AM CSRs only. This is the IRS's official measure for telephone level of service.

[5] In addition to answers provided by assistors, the IRS also provides phone service to taxpayers using automation, such as informational messages or automated request lines. To better demonstrate the percentage of taxpayers receiving service from either an IRS assistor or through automation, the IRS developed this new measure that includes these automated calls.

[6] Based on a telephone survey of customers who called an IRS AM toll-free number to assess their satisfaction with the service they received during their calls.

[7] Based on a telephone survey of customers who called an IRS AM toll-free number, who were asked to assess their experiences with the service they received during their calls. This score follows the Office of Budget and Management (OMB) methodology for calculating Trust posted on Performance.gov. OMB's Federal Trust goal is 75 percent or greater.

[8] Includes contacts at 363 IRS Taxpayer Assistance Centers (TACs) and 15 Virtual Service Delivery sites. Excludes Volunteer Income Tax Assistance and Tax Counseling for the Elderly sites, which are shown separately in this table.

[9] Includes AM adjustments, including individual and business taxpayer correspondence for domestic and international taxpayers; individual and business amended returns processed; injured spouse claims; applications for Individual Taxpayer Identification Numbers; and applications for exempt organizations and employee plans.

[10] The percentage shown in this table represents the results from the AM Customer Satisfaction (Adjustments) survey and reflects the level of customer satisfaction with adjustment processing and handling of customer account correspondence, claims, and amended returns.

[11] Represents the number of organizations that distribute paper forms and publications or make reproducible forms and publications available. Some organizations may have multiple sites.

[12] Reflects events where the Federal Emergency Management Agency (FEMA) designated disaster areas and the IRS granted administrative tax relief.

[13] Following a disaster, the governor of the affected state must request a declaration by the president. Therefore, while a disaster incident is declared for a state or territory, typically only a few counties, parishes, municipalities, independent cities, etc., receive relief for each event.

[14] Represents the accuracy of federal returns prepared at Volunteer Income Tax Assistance and Tax Counseling for the Elderly sites.

[15] Represents the number of Identity Protection Personal Identification Numbers (IP PINs) assigned to qualified taxpayers.

[16] Includes tax practitioner institutes, small business forums, small business tax workshops, tax practitioner and payroll provider meetings, governmental contacts, and miscellaneous stakeholder meetings and events. Includes virtual technology-based sessions.

SOURCES: Wage and Investment, Strategy and Finance, Program Management Office; Online Services, Online Engagement, Operations and Media; Small Business/Self-Employed, Communications, Outreach, Systems and Solutions; Communications and Liaison, National Public Liaison.