



# GOVERNMENT FOR THE PEOPLE

Profiles on the customer experience

OCTOBER 2019



PARTNERSHIP FOR PUBLIC SERVICE

**accenture**

**The Partnership for Public Service** is a nonpartisan, nonprofit organization that works to revitalize the federal government by inspiring a new generation to serve and by transforming the way government works. The Partnership teams up with federal agencies and other stakeholders to make our government more effective and efficient. We pursue this goal by:

- Providing assistance to federal agencies to improve their management and operations, and to strengthen their leadership capacity.
- Conducting outreach to college campuses and job seekers to promote public service.
- Identifying and celebrating government's successes so they can be replicated across government.
- Advocating for needed legislative and regulatory reforms to strengthen the civil service.
- Generating research on, and effective responses to, the workforce challenges facing our federal government.
- Enhancing public understanding of the valuable work civil servants perform.

**Accenture Federal Services**, a wholly owned subsidiary of Accenture LLP, is a U.S. company with offices in Arlington, Virginia. Accenture's federal business has served every cabinet level department and 30 of the largest federal organizations. Accenture Federal Services transforms bold ideas into breakthrough outcomes for clients at defense, intelligence, public safety, civilian and military health organizations. Visit us at [www.accenturefederal.com](http://www.accenturefederal.com).

**Accenture** is a leading global professional services company, providing a broad range of services and solutions in strategy, consulting, digital, technology and operations. With 482,000 people serving clients in more than 120 countries, Accenture drives innovation to improve the way the world works and lives. Visit us at [www.accenture.com](http://www.accenture.com).

# Introduction



The federal government touches the lives of nearly every American each year. People often interact with the government at critical moments, including veterans looking for essential health care services or students seeking financial aid to attend college. When the government provides a good experience during these interactions, it can make a big difference in people's lives.

With continual improvements in the private sector setting high expectations about what constitutes good service, the public consistently rates the services provided by federal agencies poorly, placing them far behind other sectors and industries.<sup>1</sup> Unsatisfying experiences with these services lead to an overall lack of trust in the federal government and, according to the Pew Research Center, that trust remains near historic lows. And the 35-day partial government shutdown that began in December 2018 further damaged government's reputation while affecting many people who needed support from federal agencies.

**However, the perception of the federal government as a poor provider of customer service does not tell the whole story.** While third-party surveys give low marks to the services that agencies provide, the feedback people share directly with agencies after specific interactions often tells a different story. Many of the government's biggest services are highly rated.

For example, the Internal Revenue Service appears to have a less-than-stellar reputation, perhaps due to its unpopular task of collecting money from taxpayers. But millions of people who use some of the agency's primary services rate them highly. The agency enjoys a 90% satisfaction rate from customers who speak with an agent on the IRS' busiest phone line. Other specific interactions with the government, such as applying for a passport or getting answers to a question about Medicare, also get high marks, according to agency surveys.

There are several possible explanations for this disparity. In some instances, agencies may provide a good customer experience during one exchange, but not during all the interactions customers go through to receive a service. For example, an agency may think its contact centers provide a good experience because customers rate the service highly following their calls. However, these ratings may not pick up on the frustration of customers who had to call several times to complete their task or who were aggravated because they would have preferred to take care of their business online and were unable to do so.

Additionally, the public's perceptions of federal services may be influenced by their overall view of government or media coverage, even if their specific interactions left a more positive impression.

By pinpointing specific services and interactions that receive high ratings and digging deeper into what contributed to those ratings, the federal government can build on its strengths and spread successful practices across agencies. At the same time, if leaders understand and are forthcoming about services that customers indicate are not working well, they can take essential steps to improve. This report aims to help government do just that.

---

<sup>1</sup> In 2018, the federal government had a score of 68.9 out of 100 on the American Customer Satisfaction Index, scoring behind almost all other industries and sectors measured, a trend that has persisted for many years. In Forrester's 2018 Customer Experience Index, federal agencies earned an average score of 59 out of 100, a lower score than all but one of the 18 private sector industries measured.

# A Deeper Look at the Customer Experience

This report is a first-of-its-kind collection of customer experience data, feedback and insights from across many of the federal government's highest-impact services—those that are either provided to many customers or are consequential for the people who receive them. The Partnership for Public Service, in collaboration with Accenture Federal Services, created a series of eight customer experience profiles that offer details on how the public experiences these services. This work builds on a collaboration between the Partnership and Accenture during the past five years to conduct research and host forums on how federal agencies can strengthen the customer experience.

The profiles highlight what is working well, where there are opportunities to improve and what actions agencies are taking to do better. The information can help agencies across government identify and replicate successful customer experience efforts, find solutions to common challenges and track progress.

This work builds on customer experience data and information published in September 2019 through the President's Management Agenda and the federal cross-agency priority goal on customer experience, led by the Office of Management and Budget. Through this effort, the federal government is establishing a standardized framework for agencies to measure, report and act on customer experience data.

OMB's initiative is a key first step for understanding how customers experience services across the federal landscape, and it is important for this effort to continue. Currently, most of the customer survey data that agencies collect is unavailable to the public due to restrictions imposed by the Paperwork Reduction Act. Additionally, the data are not comparable across agencies, as each agency collects information differently.

In addition to highlighting the results of available agency customer surveys, our profiles provide further context, analysis and insights on the customer experience. The content is based on interviews with federal officials who lead customer experience initiatives; an analysis of how easy it is to understand and navigate key agency website content; a scan of social media comments about federal services; and a review of actions agencies are taking to prioritize the customer experience.

The services examined in this report collectively affect the lives of nearly all Americans, including anyone who pays taxes, travels through a U.S. airport, receives or repays federal student aid, or gets Medicare benefits. **Customers called the government about these and the other services we examined more than 194 million times in fiscal 2018 and visited their websites nearly 1.7 billion times.** The breadth of these interactions demonstrates both the magnitude of the government's challenge, and the unparalleled opportunity agencies have each day to improve service to the public.

## THE PAPERWORK REDUCTION ACT LIMITS ACCOUNTABILITY TO CUSTOMERS

Paperwork Reduction Act restrictions have, in many cases, hindered agencies from meeting OMB's customer experience guidance and being transparent about customer feedback.

The PRA requires agencies to complete an extensive approval process before collecting information from 10 or more members of the public—a process that often takes six to nine months, or more. This applies both to surveys and to gathering valuable customer feedback through structured interviews with standardized questions.

In a world in which customers' expectations can change overnight, OMB has sought to speed the approval process so that agencies can collect feedback quickly and maintain an up-to-date understanding of their customers' needs. Many agencies use a streamlined clearance process offered by OMB for PRA approval in five days, rather than months, but that process comes with strict limitations, including that the results of surveys and data collections cannot be shared publicly.

This means that little of the data and feedback agencies collect from their customers is shared with the public, resulting in missed opportunities for agencies to celebrate successes and for the public to hold agencies accountable for improving.

Congress has proposed legislation that would help fix the problem. The Federal Agency Customer Experience Act of 2019, which passed the Senate in July 2019, would exempt certain types of voluntary customer feedback from PRA review requirements. As of September 2019, the law is awaiting consideration in the House.



## OVERVIEW OF EIGHT FEDERAL SERVICES

This report examines customers' experiences with eight federal services that are among those with the highest volume of direct contact with the public. These include:

-  **Airport security screening and passenger support services**  
Transportation Security Administration
-  **Citizenship and immigration applicant services**  
U.S. Citizenship and Immigration Services
-  **Customs security and screening services**  
Customs and Border Protection
-  **Federal student aid application services**  
Office of Federal Student Aid
-  **Individual taxpayer services**  
Internal Revenue Service
-  **Medicare customer support services**  
Centers for Medicare and Medicaid Services
-  **Outpatient health care services for veterans**  
Veterans Health Administration
-  **Passport services**  
Bureau of Consular Affairs

We selected these services by examining available data on how many individuals are served by each of the 25 high-impact service providers identified by OMB in 2018 (see Appendix III for the list of high-impact service providers). In cases in which OMB identified one agency as providing multiple high-impact services, we selected the ones that served the most people.

**TABLE 1: VOLUME OF AGENCY CONTACT WITH THE PUBLIC**

Agency	Phone Calls (in millions)	Online Visits (in millions)	Face-to-Face Contacts (in millions)
Internal Revenue Service (taxpayer services)	77.7	608.8	2.9
Veterans Health Administration (outpatient services)	>41.0	280.1	85.9
Federal Student Aid	>30.0	44.5	<i>Not applicable</i>
Centers for Medicare and Medicaid Services (Medicare services)	23.8	412.8	<i>Not applicable</i>
U.S. Citizenship and Immigration Services	13.9	193.2	-1.0
Bureau of Consular Affairs (passport services)	4.3	69.5	0.9
Customs and Border Protection	2.1	40.5	413.9
Transportation Security Administration	1.2	48.9	813.8

*Note: Some data points are for the agency overall, while others relate to the specific service listed. See each agency profile for more details.*



## Why a Customer Experience Focus Is Critical

The public deserves high-quality services from its government as a given, and astute federal leaders also recognize what the private sector has long known: The benefits of improving the customer experience go well beyond satisfied customers.

Focusing on the customer experience could help federal leaders:

### ADVANCE MISSION-CRITICAL GOALS

Customer experience improvements can lead to success with other goals. For example, creating a streamlined experience for applying for student aid helps the Department of Education meet its goal of delivering the financial support students need to attend college. At the State Department, making it easier for customers to report lost or stolen passports helps reduce security vulnerabilities. At the IRS, making it easy for people to accurately determine their taxes and file their return increases compliance with tax law.

### ALLOCATE RESOURCES BETTER

Many agencies struggle to deal with the cost of millions of phone calls, in-person visits and requests from the public each year. In some cases, agencies that streamlined processes for customers and offered convenient self-service options and proactive updates have been able to deflect traffic to other, less costly channels while reducing customer frustration. This enabled customer service agents to focus on more complex interactions and customer needs. For example, by developing clear and targeted communication campaigns to help taxpayers understand their responsibilities and tax filing processes, the IRS made it easier to comply with tax laws and reduced the volume of contacts and questions from the public.

### INCREASE EFFICIENCY OF BUSINESS OPERATIONS

By helping customers prepare for their interactions with government and know what to expect, agencies can increase the odds those interactions will go well. For example, TSA is working to keep operations smooth at airport security checkpoints by helping travelers prepare for the screening process and have a good understanding of what items are not permitted.

### RESTORE TRUST

When the VA launched a major customer experience transformation in 2015, the primary goal was to regain trust among veterans. By redesigning many services from their perspective, the agency increased the percentage of veterans who said they trust the VA to fulfill our country's commitment to veterans to 72% in April 2019 from 59% in July 2016.

# Key Themes on the Federal Customer Experience



Several themes emerged from the customer experience profiles of these eight federal services. We found agencies are delivering a good customer experience in many instances, and we also identified challenges and issues customers face as well as steps agencies are taking to improve.

## HIGH LEVELS OF SATISFACTION WITH MANY SERVICES AND THE PEOPLE WHO PROVIDE THEM

More than 77 million callers contacted the IRS' account management line in fiscal 2018 to inquire about their tax accounts or get answers to tax-law questions. While it can be difficult for callers to reach a representative on this line at times, those who did in fiscal 2018 reported a 90% customer satisfaction rate, according to the IRS. Customers specifically highlighted the professionalism and helpfulness of IRS staff as key to their satisfaction.

The 1-800-MEDICARE contact center also elicits high levels of customer satisfaction. The contact center received more than 23 million calls in fiscal 2018, and while Centers for Medicare and Medicaid Services does not publish detailed results of its post-call surveys, satisfaction rates are consistently near 90%, according to agency officials familiar with those surveys. Callers praise Medicare representatives for being courteous, well-informed and helpful in answering questions on topics such as the services covered under different Medicare plans.

Beyond individual points of contact, such as calls and website visits, some agencies deliver a good experience across the whole process or set of steps someone goes through to accomplish a goal, referred to as the customer journey. One example is applying for and receiving a U.S. passport. Customers gave the process a score of 87 out of 100, according to a survey conducted by the Bureau of Consular Affairs. Many respondents praised the knowledge and professionalism of the staff members who assisted them.

One reason behind the success of some federal services is that the organizations providing them have done more than simply hire or train courteous and professional employees. They also provide employees with insights about what matters most to customers and suggest specific actions that can improve the experience for their customers. For example, through extensive research and interviews, the VA identified the moments that matter most to veterans when they interact with the department. VA leaders then provided training and guidance to help employees address any frustrations veterans experienced during those moments. As one example, based on feedback from veterans, the agency launched a program that encouraged medical providers to sit down when meeting with patients, so the appointments did not feel rushed.

## LACK OF PUBLICLY AVAILABLE DATA

Agencies collect a lot of data and feedback about the experiences of their customers, but most of those results are not shared publicly. This constrains government from highlighting the services that receive positive customer feedback and limits government from being held accountable for improving services that are rated poorly. The amount and quality of data that agencies provided to us to include in our customer experience profiles varied, with some agencies sharing detailed survey results and others not able to share any data at all.

Additionally, because the methods for surveying customers vary across government, it is difficult to compare customer survey results across agencies, or with private sector organizations, which would help put these scores in context. For example, it is not easy for many agencies to see how the ratings of their contact centers or websites compare with those of others in government who deliver similar services, or with leading private sector organizations.

Efforts are underway to address this issue through the cross-agency priority goal on customer experience, led by the Office of Management and Budget. In 2018, OMB issued guidance that established a standardized framework for measuring customer experience across 25 key federal services. This framework established broad categories of customer survey questions that must be used by agencies to collect and publicly report on customer feedback.

As noted above, the Paperwork Reduction Act has presented a hurdle for OMB and agencies in executing this guidance, as it places restrictions on what customer survey data can be shared publicly.

To address this issue, OMB and the General Services Administration are building a customer survey tool that agencies could adopt that would be precleared under the PRA, allowing the results of those surveys to be shared publicly.

## INCONSISTENT AND SOMETIMES CONFUSING EXPERIENCES ACROSS FEDERAL WEBSITES

People may find clear, user-friendly information and access to federal services on some websites, but struggle on others to get what they need. To assess the clarity and usability of selected agency web pages, we partnered with the Center for Plain Language to review how easy it is to navigate sites and understand website content. The average grade across the set of eight agency web pages was a “B+.” The average grade across 23 agencies in the 2018 Federal Plain Language Report Card, which the center issues annually, was a “C.”

The websites with higher grades excelled at structuring information around audience needs and key tasks users would like to accomplish, which is critical for a positive online experience. These sites made the primary information for customers stand out by using design techniques such as boldface type, color and visual aids. They also contained white space that reduced clutter and gave them a “cleaner” feel. Sidebars ensured additional content was available, but did not overwhelm users with too much information.

For example, the website providing U.S. passport information was uncluttered and guided the users through key tasks, such as renewing a passport or obtaining a new passport for a child. The site contained engaging graphics, charts, videos and interactive tools, which likely contributed to the 91% satisfaction rate visitors gave the passport website, according to an agency customer survey.

Websites that scored lower tended to pack in information that could distract users from their primary tasks and make it difficult for them to find what they were looking for. For example, reviewers found the IRS pages with instructions for small businesses on filing taxes crammed with distracting information and dozens of links.

While nearly all the websites used simple, clear language on opening pages, several contained jargon, acronyms and bureaucratic language on pages deeper down in the site, such as Frequently Asked Questions pages, which makes it difficult for users to understand what they need to do. For example, on some pages explaining how to apply for Medicare, reviewers found unfamiliar acronyms, and medical insurance jargon such as “creditable prescription drug coverage.” On the Customs and Border Protection website, reviewers found dense, bureaucratic language on the pages explaining trusted traveler programs. While agencies may sometimes be required by law to use complex terms or phrases when describing their programs, some were more effective than others in providing clear definitions to help people understand those terms.

## WEBSITE EXPERIENCE GRADE

*Based on ease of navigation and whether information was understandable*

### **Airport Screening and Support Services: A**

Information on applying for TSA Precheck

### **Citizenship Application and Support Services: A-**

Information on applying for citizenship, a green card or work permit in the United States

### **Customs Security and Screening Services: B-**

Information on applying for trusted traveler programs

### **Federal Student Aid: A**

Information on applying for student aid

### **Medicare Services: C**

Information about how to apply for Medicare

### **Passport Services: A-**

Information on applying for and receiving a passport

### **Taxpayer Services: C+**

Information on how to file taxes

### **Veterans' Health Care: A**

Information on applying for health care

---

## Methodology

For each agency, we selected for review a set of web pages that provided information on how customers apply for or access one of the agency's highest-volume services.

We partnered with the Center for Plain Language to conduct this review. The center followed the same methodology it uses to assess plain language for its annual ClearMark awards for a range of organizations and its annual Federal Plain Language Report Card for the government. This process involved developing two profiles of typical users for each set of agency web pages. The user profiles helped focus reviews on typical tasks, for example, an individual applying for a green card for the first time.

Two plain-language experts individually and independently reviewed and scored each set of pages, using five plain-language criteria to assess each site. They rated each criterion on a five-point scale:

- Information design and navigation.
- Pictures, graphics and charts.
- Style or voice.
- Structure and content.
- Understanding of audience.

The reviewers then met to reach consensus on strengths and weaknesses of each site and to assign a letter grade based on their ratings.



## LIMITED ACCESS TO SERVICES ONLINE

In addition to providing readable information online, agencies must also ensure users can complete important tasks and transactions electronically. Our analysis found that many high-volume federal services do not yet offer that option. This is more than just an inconvenience. When customers must interact with the government in ways that seem archaic or out of sync with their expectations—which are set by their everyday experience with commercial services—it reduces their confidence in government overall.

For example, the 21 million customers who applied for and received passports in fiscal 2018 were unable to do so online. Most customers printed application forms and submitted them through the mail. Similarly, the more than 1.1 million individuals who applied for and received a green card indicating permanent residence status in the United States in fiscal 2017 were unable to do so online.

Where online options exist, many agencies could do a better job of meeting users' needs. For example, the Office of Federal Student Aid is addressing what currently seems like a fragmented digital experience for aid recipients, so borrowers will no longer need to interact with multiple systems, websites and vendors to get aid and repay loans.

## LACK OF TRANSPARENCY INTO GOVERNMENT PROCESSES

Customers of federal services may feel as if they are interacting with a “black box.” They apply for a service or submit a request and do not know what is supposed to happen next. They might wait months without an update and then contact the agency, assuming their application or request must have been lost.

This scenario is bad for customers, federal agencies and taxpayers. People may already face long processing times for some interactions with agencies, and not knowing when they will hear back can make them even more frustrated. Confused customers call contact centers and visit field offices for answers, and those are expensive interactions. For example, the IRS estimated it costs the agency \$41 to field a phone call and \$67 per office visit.

The Citizenship and Immigration Services Ombudsman's Office estimated that more than half the calls it received were from people confused about the status of their immigration case—a trend we also observed in our scan of social media comments about immigration services.

Similarly, travelers were confused about aspects of the Transportation Security Administration security screening process—sometimes about which items are prohibited for travel, other times about why they were pulled out of line for additional screening. Doing a better job of educating travelers about what to expect at TSA checkpoints could lead to a better experience and help the agency conduct screenings more effectively.

Agencies that provide quick, straightforward infor-

mation, clarify processes and address customer questions have seen positive results. For example, after the IRS recognized that a large portion of calls received during the tax season were inquiries about refund status, the agency launched several online options in 2008 to assist people in checking on their refunds. These tools have grown in popularity over the past decade, with customers using them more than 350 million times in the first half of 2019 alone, greatly reducing calls to the agency.

## IMPACT FROM THE GOVERNMENT SHUTDOWN

The partial government shutdown that ran from December 22, 2018 to January 25, 2019, which was the longest shutdown in U.S. history, affected many people who needed government services. The shutdown affected services provided by CBP, TSA and the IRS as many employees from these agencies were unable to work or required to do so without pay.

For example, the IRS had to cancel more than 16,000 taxpayer appointments scheduled during that time, according to a National Taxpayer Advocate report. And the impact of the shutdown continued after the agency reopened, with longer wait times for callers, and fewer callers getting through to representatives during the 2019 tax filing season, compared with 2018.

Domestic and international travelers also experienced adverse effects. TSA employees at security checkpoints were required to work without pay for those five weeks, causing major staffing shortages when some employees did not report for work, and wait times as long as 60 minutes at some airport checkpoints. The shutdown also contributed to lasting delays in processing Global Entry applications for travelers seeking expedited customs screening at the U.S. border, as did a record number of applications for the program in 2018 and 2019. While most applications took 15 days or fewer to process as of July 2019, about 25% of applications took more than 90 days, according to CBP officials. Delays occurred for a number of reasons. Some applications entail more scrutiny—for example, officials perform lengthier background checks on people who change their address frequently.

## VALUABLE SOCIAL MEDIA INSIGHTS

Social media comments can be a valuable source of customer feedback and may yield different insights than surveys and other customer research. Analyzing these comments can help organizations understand how their customers view agency services and identify areas for improvement.

The eight agencies we reviewed all have a social media presence on channels such as Facebook and Twitter, with a few also engaging customers on Instagram and YouTube. They use their social media accounts to interact with customers, deliver information and updates, and sometimes answer questions or concerns.

They also turn to these channels to push out information to the public. For example, Medicare uses its Facebook and Twitter accounts to inform customers about Medicare access when abroad and provide reminders to get flu shots. Federal Student Aid also posts announcements on its accounts, using them to respond to customers' questions about the process of applying for, receiving and repaying student aid.

We scanned more than 80,000 online posts about federal services on social media platforms such as Twitter, Reddit, Instagram and Yelp, which typically attract customer comments about government. We identified the following trends, based on customers' perspectives about federal services offered online, and highlight examples of how agencies improved services using feedback from social media.

- **Customer concerns that agencies can fix.**

In many cases, federal customers take to social media to discuss problems they experience with government websites, such as trouble logging into a service portal, error messages when submitting an application, or difficulty reaching staff at a contact center.

Rather than simply making generic complaints, people often identify issues agencies can fix. At the IRS, a team monitors all the channels citizens use to interact with the agency and feeds information from social media posts into an early warning system to identify and fix customer problems before they become widespread. For example, if a customer tweets at the IRS that a form has the wrong phone number,

the system alerts team members to investigate and quickly resolve the issue.

- **Praise for federal programs or staff that can be used to identify and reinforce success.**

While customers are more likely to use social media to complain rather than compliment, not all the posts we analyzed were negative. From commending the benefits of expedited travel programs, such as TSA Precheck and Global Entry, to highlighting excellent customer service from specific individuals in USCIS field offices, we found customers often left positive feedback. Some U.S. passport offices share the praise they receive from social media posts with relevant staff to help recognize, reinforce and celebrate excellent service.

- **Questions about processes or forms that agencies can answer.**

Most of the online posts we analyzed were neither positive nor negative. Many involved customers asking the agency questions or seeking advice. For example, customers posted questions about which tax forms to use and asked about the estimated processing times for immigration forms. Several agencies, such as Federal Student Aid, TSA and the Bureau of Consular Affairs, directly answer some customer questions through social media, saving time for the customer who inquired and also potentially helping other followers who had the same question. Agencies can also monitor conversations on social media to ensure the advice and information users provide to one another is accurate and, if not, to correct misconceptions.

## SOCIAL MEDIA METHODOLOGY

Accenture conducted the social media scan using a social media intelligence platform. Using keyword searches, the team identified comments posted from November 2018 through February 2019 about each federal service on popular social media sites such as Twitter, Reddit, Instagram, Yelp, Google and other online forums. The majority (61%) of the posts ultimately included in the analysis were from Twitter.

The team excluded posts primarily containing political commentary and grouped posts to identify themes in customer feedback for each federal service. The methodology allowed us to identify common trends in posts about each service and identify potential issues customers face but cannot be used to draw firm conclusions about the experience of the full range of its customers.













## STEPS AGENCIES ARE TAKING TO PRIORITIZE THE CUSTOMER EXPERIENCE AND IMPROVE SERVICES

We reviewed each agency service against a list of indicators that demonstrate agencies are taking steps to prioritize the customer experience and improve services (see Table 2). We found that while many agencies were taking important actions, they could do more. For example, more agencies could establish a strategic goal and performance measures related to the customer experience, and assign a senior executive with the responsibility and authority to lead service improvements. They could also adopt additional techniques for collecting feedback

that would give them a deeper understanding of their customers, and lead to useful insights about how to improve services.

We developed our list of indicators based on research about effective customer experience practices in both the private and public sectors, and the list aligns with practices in an agency self-assessment of customer experience maturity that OMB created. Leaders who participated in the Partnership's federal customer experience roundtables provided input on the indicators.

**TABLE 2: INDICATORS THAT CUSTOMER EXPERIENCE IS A HIGH PRIORITY**

 Yes  No  Partially	Airport security screening and passenger support services (TSA)	Citizenship and immigration applicant services (USCIS)	Customs security and screening services (CBP)	Federal student aid applicant services (FSA)	Individual taxpayer services (IRS)	Medicare customer support services (CMS)	Outpatient health care services for veterans (VHA)	Passport services (Bureau of Consular Affairs)
Agency goals include customer experience								
Agency has a key performance measure based on customer experience								
Agency has a senior executive for customer experience								
Agency has a process for standardizing information across channels								
Agency shares customer feedback with the public								
Customers can complete key services online								
Customers can easily find information to call appropriate representatives								
Customers can schedule in-person appointments				N/A		N/A		
Customers can obtain status updates								
Agency collects feedback on specific interactions								
Agency collects feedback on customer journeys								
Agency collects feedback on the overall service								
Agency collects feedback through qualitative research								

# How to Create a Better Customer Experience

While this report examines the customer experience with eight federal services, many of the challenges and opportunities it reveals are applicable to agencies across government. The findings suggest concrete steps that federal agencies, the Office of Management and Budget, and Congress can take to improve federal services.

### AGENCIES SHOULD

#### **Use research, feedback and data to understand customers better**

Agencies should avoid the temptation to jump right into customer experience improvements based on assumptions about what customers want—or the results of a single survey—and instead use a variety of techniques including focus groups, interviews and direct observation of customer interactions to gain a deeper understanding of the customer experience.

All the agencies we reviewed collect feedback from specific customer transactions, such as phone calls or website visits. However, some organizations neglect to collect feedback on the whole journey customers take to complete a process or reach a goal, or on the overall perception customers have of their organizations—steps that could give them a deeper understanding of their customers.

#### **Use customer insights to create a feedback loop that enables continual improvement**

Agencies should create a feedback loop where customer experience data and insights drive service delivery improvements. They also should measure the effect of those improvements to determine if they worked and make adjustments as necessary.

#### **Establish a key performance measure based on customer feedback**

Several of the agencies we reviewed do not include improving the customer experience in their strategic goals, and lack a key performance measure based on customer feedback. Many agencies track performance measures, such as how quickly they serve customers or how many applications they process. But without a performance measure based on customer feedback, they may lack an understanding of how well their services are meeting customer expectations and needs.

#### **Assign a senior executive to lead customer experience efforts across the organization**

Only two of the agencies we reviewed have a senior executive with the primary responsibility and authority to lead customer experience efforts across the organization. At both Federal Student Aid and the Department of Veterans Affairs, having a senior executive focused primarily on customer experience has been critical to making improvements that require agency-wide coordination, such as consolidating multiple websites to create a simplified and consistent online presence.

Assigning a customer experience leader to an agency's core executive team increases the likelihood they will have sufficient clout to make changes. The leader's work should span all the major service delivery channels to promote a consistent and streamlined experience for customers.

#### **Transform cultures to be more customer-centered**

Leaders can start by establishing a clear vision and strategy that identifies who their customers are, what kind of experience they expect and what specific steps staff will take to improve services. They also can include customer feedback in employee performance plans for both executives and staff who interact directly with customers.

#### **Employ practices such as human-centered design to incorporate the customer perspective into services and products**

Human-centered design is a structured approach for creating products and services around the needs, wants, and behaviors of people. A core component of HCD is to engage customers using qualitative research methods such as interviews and first-hand observation to design with insight on their experiences and perspectives.



### **Improve information and services delivered online**

Agencies could make improvements by ensuring information and services are designed around user needs and are easy to understand and navigate. Government-wide, agency websites received an average grade of “C” on the 2018 Federal Plain Language Report Card.

### **Take advantage of social media platforms to provide customers information, collect feedback and answer questions when appropriate**

Agencies can use social media to make it easier for customers to obtain information about their services and get questions answered. Additionally, customers often leave useful feedback about services on social media that agencies can combine with other research to better understand the customer experience.

## **CONGRESS SHOULD**

### **Revise the Paperwork Reduction Act**

As it stands, the act creates barriers for collecting customer feedback and limits transparency by making it difficult for agencies to publish the customer feedback they receive. Congress should revise the law to clarify that it does not apply to voluntary customer feedback. The Federal Agency Customer Experience Act of 2019, which passed the Senate in July 2019, would help fix this problem by exempting certain types of voluntary customer feedback from the PRA’s review requirements.

### **Require agencies delivering high-impact public services to develop customer experience standards**

These standards would require agencies to establish clear goals and would set expectations for customers when receiving services. Standards should cover topics such as the quality, speed and effectiveness of a service and should be based on research that identifies the aspects of service delivery most important to customers.

## **THE OFFICE OF MANAGEMENT AND BUDGET SHOULD**

### **Work with agencies to collect and publish comparable customer experience measures across government**

OMB took an important step in this direction by issuing guidance in 2018 that established broad categories of customer survey questions agencies should use to collect and publicly report on customer feedback. As part of this effort, OMB published initial data from agencies on Performance.gov in September 2019.

Significant gaps exist in this data, either because agencies do not collect customer feedback or they are unable to publish their data due to restrictions imposed by the PRA. Additionally, the data are not comparable across agencies, as each agency has different ways of wording customer survey questions and collecting information.

OMB should continue working with agencies to address data gaps and ensure greater data consistency and comparability by requiring that agencies adopt a few standardized questions, while leaving room for them to collect additional information unique to their services. This approach would make it easier to assess progress across agencies over time, and identify successes to replicate and places where challenges need to be addressed.

### **Consider customer experience data and information as a factor when evaluating agency performance and making budget decisions**

When evaluating program effectiveness and making budget decisions, OMB and agencies should consider whether programs are working from the perspective of customers. Using high-quality customer experience data OMB and agencies should ensure that program decisions and investments will improve the customer experience and meet pressing customer needs.





# Conclusion

---

As the needs of government's customers continue to change, and the private sector further raises the bar on what constitutes a good customer experience, government should constantly adapt in order to keep pace. The recommendations outlined in this report, such as using customer experience insights and data to drive decisions, and improving the availability and comparability of that data across agencies, can help government meet customers' expectations, deliver mission objectives and keep pace with private sector advancements.

What follows is a series of profiles with detailed information and insights on the customer experience with eight key federal services. The profiles highlight why these services are critical to the public, pinpoint successful customer experience initiatives that could be replicated across government, and provide ideas on how to address key challenges.

The Partnership and Accenture plan to build on these profiles in the future, adding new data and insights and highlighting additional federal services.

---

## Agency Profiles

This report examines customers' experiences with eight federal services that are among those with the highest volume of direct contact with the public.

---

- |    |   |  |
|----|---|--|
| 16 |    | <b>Airport security screening and passenger support services</b><br>Transportation Security Administration |
| 22 |   | <b>Citizenship and immigration applicant services</b><br>U.S. Citizenship and Immigration Services         |
| 28 |  | <b>Customs security and screening services</b><br>Customs and Border Protection                            |
| 34 |  | <b>Federal student aid application services</b><br>Office of Federal Student Aid                           |
| 40 |  | <b>Individual taxpayer services</b><br>Internal Revenue Service  |
| 46 |  | <b>Medicare customer support services</b><br>Centers for Medicare and Medicaid Services                    |
| 52 |  | <b>Outpatient health care services for veterans</b><br>Veterans Health Administration                      |
| 58 |  | <b>Passport services</b><br>Bureau of Consular Affairs   |



# Airport Security Screening and Passenger Support Services

Transportation Security Administration

## Summary

The Transportation Security Administration officers stationed at the nation's nearly 450 airports screened more than 800 million travelers in fiscal 2018. TSA works to protect the nation's transportation systems, and also make sure that travelers understand what they need to do to move through security checkpoints, so the process is quicker and more effective for all involved.

The traveling public is largely satisfied with the screening process at TSA checkpoints, and most people appreciated the professionalism of TSA officers, according to TSA officials. However, people also note their screening experiences were different depending on the airport, and those types of inconsistencies can reduce the public's confidence in the agency.

Checkpoint rules also change from time to time. TSA officials have found that passengers do not always know what to expect when going through security checkpoints, which can lead to confusion and frustration. Many travelers are not aware of the information and resources TSA provides to travelers, however, in addition to its website, the agency is also active on several social media platforms. For example, its Facebook and Twitter accounts provide the traveling public a channel for fast and reliable information, typically responding to customers' questions within an hour, which is better than many private sector companies.

In our analysis of the website that includes the application for TSA Precheck—the agency's signature membership program for helping speed passengers through security checkpoints—we found the agency provided clear and useful information.

This past year, the agency experienced challenges due to the partial government shutdown that ran from December 2018 to January 2019. TSA airport employees worked without pay, and staffing shortages arose during the five-week shutdown. TSA reported that, during that time, most travelers waited less than 30 minutes in checkpoint lines, though customers at some airports waited as long as 60 minutes.

### DID YOU KNOW?

Items confiscated at TSA checkpoints in recent years include nunchucks and ninja stars—both of which could be used as weapons—as well as endangered seahorses and a movie prop corpse, according to TSA's Instagram account.

## Service Overview<sup>1</sup>

### Key Services Related to Security Screening and Passenger Support

- Security screenings at U.S. airports.
- Information about policies and procedures for traveling and preparing for checkpoint screenings.
- Enrollment and application processing for TSA Precheck.
- Assistance during the security screening process—through the TSA Cares program—for passengers with disabilities, medical conditions or other special circumstances.
- Clarification related to watchlist names to prevent confusion about and misidentification of travelers through the Department of Homeland Security Traveler Redress Inquiry Program.

### PRIMARY CUSTOMERS

Passengers of all modes of transportation within the United States, with air travelers making up the majority.

<sup>1</sup> Data provided by TSA for fiscal 2018.

**CALLS****1.2 million**

calls to TSA's customer service line

**WAIT TIME****<1 minute**

average wait time to speak with a representative

**ONLINE VISITS****48.9 million**visits to TSA.gov<sup>2</sup>**FACE-TO-FACE CONTACTS****813.8 million**passengers and crew members through TSA screening<sup>3</sup>**TSA PRECHECK ENROLLMENTS****1.8 million****TSA CARES PROGRAM ASSISTANCE****24,239**

passengers

**DHS TRAVELER REDRESS INQUIRY PROGRAM****15,100**

applications reviewed

<sup>2</sup> Transportation Security Administration, "Web Metrics." Retrieved from <http://bit.ly/2N4cpTV>

<sup>3</sup> Transportation Security Administration, "TSA Year in Review: A Record Setting 2018." Retrieved from <http://bit.ly/2H8UsQ7>

## Social Media Presence

TSA engages with customers on Twitter, Facebook, Instagram and YouTube, using them to distribute information, answer travel questions and prepare people for security screenings. With nearly 1 million followers, the agency's Instagram account provides fun, pun-filled posts that also educate the public on what is and is not allowed through airport security. The account placed fourth on Rolling Stone magazine's list of top 100 Instagram accounts. For example, an August post started with, "Roses are red, violets are blue, a knife hidden in your flowers can't be carried through ..." and was accompanied by a photo of the knife and the roses where it was found.

TSA has a social media team that responds to customers' questions on Facebook and Twitter and points them in the right direction for information on the agency's website. The average wait time for a response is typically an hour, according to TSA officials. That response time is far better than many private sector companies. In one study of 500 retail companies, it took an average of about 30 hours to respond to Facebook and Twitter questions.<sup>4</sup>

As of September 2019, the agency's social media presence includes:

**TWITTER****@TSA**

Joined: November 2011

Followers:

**230K**

Tweets:

**8.6K****TWITTER****@AskTSA**

Joined: May 2015

Followers:

**51.8K**

Tweets:

**108K****FACEBOOK****@TSA**

Joined: April 2017

Followers:

**21.7K**

Likes:

**20K**

*Answers questions about traveling and preparing for checkpoint screenings*

<sup>4</sup> Eptica, "Retail: Eptica Multichannel Customer Experience Study," 2015. Retrieved from: <https://bit.ly/2zg5cb3>


**FACEBOOK**
**@AskTSA**

Joined: June 2016

Followers:

**31.9K**

Likes:

**29.8K**
*Answers questions about travel issues and preparation for checkpoint screenings*

**INSTAGRAM**
**@tsa**

Joined: June 2013

Followers:

**999K**

Posts:

**1,636**

**YOUTUBE**
**TSA**

Joined: June 2007

Subscribers:

**N/A**

Views:

**9.6M**

## Customer Feedback

TSA collects customer feedback from across the channels the agency uses to interact with the public, including the experience at airport screening checkpoints. We were not able to include the results of TSA's customer surveys due to restrictions associated with the Paperwork Reduction Act that preclude TSA from sharing them publicly. However, interviews with agency officials provided the following information on progress and challenges:

### Customer Experience Highlights

- **Travelers are largely satisfied with TSA's security screening experience and feel that TSA officers conducting screenings act professionally,** according to TSA officials. "We found that the confidence that travelers have in TSA, the time it takes to get through security and officer professionalism all appear to be good indicators of a traveler's overall satisfaction with the screening process," said Michelle Cartagena, director of customer service at TSA.
- **Travelers appreciate TSA's Precheck program.** TSA Precheck members typically do not have to remove items such as shoes and belts and wait less than five minutes, on average, to get through security, compared with nearly eight minutes in the regular lines. TSA officials expect that very few individuals would not renew their membership when it expired, either because they did not fly often enough or the membership fee was too expensive.

Our scan of approximately 11,000 online comments about TSA airport screening found many examples of useful customer feedback, such as people expressing confusion about what items are permitted at checkpoints and concerns with screening procedures for people with disabilities. Here, we provide specific examples of posts that reinforce themes in customer feedback identified elsewhere in the profile. Along with comments on other topics, we found many instances of people praising the benefits of TSA Precheck as well as offering constructive criticism.

For example:

**"TSA Precheck is the best money I've ever spent. Airport lobby all the way through security in 4 minutes."**

**"NO @TSA precheck available at @SpiritAirlines in @FLLFlyer this morning. @TSA you need to update your app that says it's available today. 🙄🙄"**

*See page 10 for more information about our methodology.*



## Opportunities to Improve the Customer Experience

- **Some travelers find their screening experiences to be inconsistent**, potentially decreasing their confidence in the agency, according to Cartagena. Some common complaints TSA received involved the lack of thorough and consistent security screening. For example, travelers may go through a checkpoint at one airport and be asked to take out liquids from their carry-ons, but then get through a checkpoint at another airport carrying liquids. According to Cartagena, TSA is developing plans to smooth out disparities to provide a consistent, positive customer experience.
- **Some travelers were confused about aspects of the screening process**, such as what triggers the need for additional screening. Often when travelers were selected for additional screening, officers did not always clearly explain why, according to TSA officials. This can lead to confusion and frustration for travelers.
- **Most travelers were unaware of the TSA resources available** to help them prepare for the screening process. TSA provides thorough information to help travelers get ready, both on its social media accounts and on its website. However, not many people know about these resources, according to TSA officials. “If travelers are unprepared or do not know what to expect when going through security screenings, that is going to create a less satisfying experience,” Cartagena said. “The better we can prepare individuals ... the better it will go for both passengers and officers.”

### PROMISING PRACTICE

#### COORDINATION ACROSS SILOS TO IMPROVE CUSTOMER EXPERIENCE

TSA has a customer experience advisory council to coordinate efforts across agency offices that interact with the public, including offices that manage contact centers, social media accounts and operations at TSA security checkpoints. Members are mid- to senior-level officials who report to or work closely with the most senior leader in their offices. Council members convene quarterly to address cross-cutting issues as they emerge, and what could be improved. For example, in fiscal 2019 the council instituted a coordinated approach for collecting, understanding and acting on traveler feedback.

The advisory council's first task was to figure out what data and customer feedback TSA already had—and what information it still needed. Council members learned the agency had ample data and feedback about travelers' experiences involving visits to TSA websites or calls to contact centers, but lacked sufficient information about the most important TSA interaction with the public—going through airport security screening.

The council helped develop a new survey that was used to assess travelers' experiences at security checkpoints. As of summer 2019, it was analyzing the results and developing plans to address challenges respondents mentioned. Eventually, the council hopes to create centralized dashboards so leaders can review customer experience data and feedback from across the organization.

## Website Experience: How Easy Is It to Navigate and Understand Online Information?

In April 2019, the Partnership and Accenture partnered with the Center for Plain Language, a nonprofit organization that champions clear language, to conduct an analysis of selected TSA websites that provide information on applying for TSA Precheck. Reviewers looked at the sites from the perspective of two potential customers: someone who wants to apply for TSA Precheck and someone who wants to renew a Precheck membership.

**Note:** In a separate study, the center examines a range of government websites annually and issues a Federal Plain Language Report Card. The average grade in calendar year 2018 was a “C.”

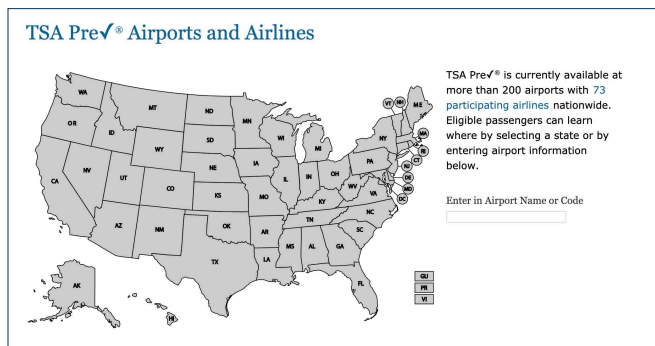
See page 8 for more information on our methodology.

**TSA GRADE  
(APRIL 2019)**

**A**

### What the Analysis Found

Overall, this site has many things just right. It is clean, inviting and easy to use. It enables users to either get to the task immediately or easily explore the site. The site is effective for any user who wants to complete the task of applying for or renewing TSA Precheck. Additional elements, such as videos and interactive graphics, further enhance the user experience.



**Figure 1:** Good use of an interactive graphic.






## Indicators That Customer Experience Is a High Priority

The Partnership and Accenture developed the following list of indicators to understand how agencies are prioritizing the customer experience, and steps they can take to improve. The list is based on research about effective customer experience practices in both government and the private sector, and aligns with practices in a customer experience maturity self-assessment for agencies developed by the Office of Management and Budget. Leaders who participate in the Partnership's federal customer experience roundtable provided input.

See Appendix IV for more details on our methodology.





### Commitment to customer experience

The agency:

-  **Includes high-quality customer experience in its strategic goals.**
-  **Specifies customer feedback as a key measure of the organization's performance.**  
*TSA does track and report on performance measures important to customers, such as wait times at security check points.*
-  **Has a senior executive with the responsibility and authority to lead efforts to improve customer experience across the organization.**  
*However, TSA has a customer service branch that leads customer experience improvements across the agency.*
-  **Has a process for standardizing across channels the information and guidance provided to customers.**  
*TSA has systems in place to coordinate updates on both its website and social media channels to ensure customers receive consistent information.*
-  **Shares meaningful customer feedback with the public.**  
*Possibly due to restrictions associated with the Paperwork Reduction Act.*




### Customer service basics

For the most common services provided, customers can:

-  **Complete frequently used transactions online.**  
*Customers can ask questions about what items are permitted on airplanes and apply for TSA Precheck and the DHS traveler redress inquiry program. For security purposes the TSA Precheck application process requires an in-person appointment.*
-  **Easily find information to call an appropriate representative.**
-  **Schedule in-person appointments.**  
*Customers can schedule appointments online for a TSA Precheck background check and fingerprinting, and opt to receive appointment reminders.*
-  **Obtain status updates.**  
*Customers can get status updates on their Precheck applications and check the status of their redress complaints.*

### Customer feedback

The agency collects and analyzes data and information on customer perceptions:

-  **Of specific interactions, including website visits, phone calls and in-person appointments.**
-  **Of the customer journey through a series of interactions or multistage processes.**
-  **Of the overall service the organization provides.**
-  **Through qualitative research, such as customer interviews, focus groups, analysis of social media comments or direct observation.**

 Yes  No  Partially

# Citizenship and Immigration Applicant Services

U.S. Citizenship and Immigration Services,  
Department of Homeland Security



## Summary

Each year, more than 8 million applications are submitted to the U.S. Citizenship and Immigration Services for citizenship, permanent residence and other immigration benefits and services, transactions that can be life-changing for those seeking assistance but also time-consuming and complex.

To interact with the agency, customers have the option to call a contact center, get information from the USCIS website or visit a field office. Many customers stated they were treated fairly in conversations with a USCIS representative, according to a contact center survey. However, they also said it could take a long time to complete the purpose of their call.

Increased processing times for immigration applications is also a challenge for customers. For example, the average case processing time for the naturalization application was 10.3 months in fiscal 2018, up from 8.1 months in fiscal 2017. More complex forms that take longer to process, as well as an increase in the number of applications received, are two factors contributing to longer wait times, according to agency officials. Processing of immigration applications was largely unaffected by the partial government shutdown that began in December 2018, since USCIS' services are primarily funded by applicant fees.

While customers waited to learn their status, they wanted clearer information about where their case was in the application process. They also wanted to know how long it might take to hear from USCIS, according to interviews with agency officials, who said they were working to provide customers with more transparency.

The agency has improved online assistance by providing self-service options to help people get information and complete tasks more easily, and offered understandable content that is easy to navigate, according to our review of selected web pages.

### DID YOU KNOW?

During the past decade, USCIS welcomed more than 7.4 million naturalized citizens to the United States.<sup>1</sup> That's more than the population of Denmark.

1 U.S. Citizenship and Immigration Services, "Naturalization Fact Sheet." Retrieved from <http://bit.ly/302gYBz>

## Service Overview<sup>2</sup>

### Key Services Provided to Applicants

- Information and assistance on immigration processes, including help with applications for U.S. citizenship, green cards and work permits.
- Updates on case status and processing times, and answers to applicants' questions.
- Information, online self-service tools, account services and access to forms.
- Instruction and training on citizenship rights and responsibilities.
- Administration of grant programs, and tools and resources to prepare immigrants for citizenship.
- Process refugee and asylum applications.

### PRIMARY CUSTOMERS

People from all around the world who seek a wide range of immigration benefits and services as well as individuals who represent them (e.g., their attorneys).

2 Data provided by USCIS for fiscal 2018.

**CALLS****13.9 million**calls to the USCIS  
contact center**WAIT TIME****<2 minutes**average wait time for  
calls that provide basic  
information**ONLINE VISITS****193.2 million**visits to  
USCIS.gov**FACE-TO-FACE CONTACTS****~1 million**approximate visits at field  
offices, according to the  
agency's online  
appointment system**~6 minutes**average wait time for  
complex calls that are  
handled by a more  
experienced officer**Social Media Presence**

USCIS engages with customers on Twitter, Facebook, Instagram and YouTube, using these platforms to inform the public of changes to policies or processes; highlight self-service options; offer tips for avoiding scams and fraud; and stream events, such as naturalization ceremonies.

As of September 2019, the agency's social media presence included:

**TWITTER****@USCIS**Joined: May 2008  
*The official Twitter  
account of U.S.  
Citizenship and  
Immigration Services*

Followers:

**178K**

Tweets:

**15.5K****@USCIS\_es**Joined: January 2012  
*Official account of  
the U.S. Citizenship  
and Immigration  
Services in Spanish.*

Followers:

**16.1K**

Tweets:

**9.6K****@EVerify**Joined: December 2014  
*News and tips regarding  
the web-based service  
employers use to  
confirm new employees  
are authorized to work  
in the U.S.*

Followers:

**32.3K**

Tweets:

**4.4K****FACEBOOK****@USCIS**

Joined: June 2011

Followers:

**583K**

Likes:

**579K****INSTAGRAM****@uscis**

Joined: N/A

Followers:

**36.8K**

Posts:

**625****YOUTUBE****USCIS**

Joined: July 2006

Subscribers:

**31K**

Views:

**4.1M**



## Customer Feedback

While not all of the customer feedback USCIS collects is publicly available, the agency does publish results from a follow-up survey of callers to its contact center.

### KEY TAKEAWAY

Callers indicated they were treated fairly by USCIS staff but did not always find it easy to complete what they needed to do over the phone in a timely manner.

### USCIS Contact Center Survey Fiscal 2019 Q1<sup>3</sup>



### Customer Experience Highlights

- **Improvements to the website made it easier to find information and complete processes online**, according to USCIS staff familiar with customer feedback. One improvement was a virtual assistant called “Emma” that helps with answering users’ questions. Our own analysis found that key USCIS web pages are easy to navigate and understand.
- **Customers are treated fairly during interactions with the USCIS contact center**, according to agency surveys. When customers feel they are treated fairly, it helps to build trust and confidence in USCIS and the decisions they make about immigration benefits and services.

The agency focuses on training contact center employees to be empathetic and patient when interacting with applicants. “This is a metric that jumped out to us, and we believe this is a reflection of the quality of the officers and the way they are trained to interact with applicants,” said Mary Herrmann, acting chief of USCIS’ Public Services Division.

<sup>3</sup> Response rate: 20%; Survey scale: five-point Likert scale ranging from “strongly disagree” to “strongly agree.” The percentages for each question represent the percentage of customers who responded “agree” and “strongly agree.”

## Opportunities to Improve the Customer Experience

- **Customers want better, more frequent information on the status of their cases and when they will be resolved.** “More than half of the feedback we get from customers is about processing times. People often reach out to us about concerns because the process is taking a while, and they think their case must have been lost,” said Allison Posner, chief of casework at the Office of the Citizenship and Immigration Services Ombudsman. This desire for updates was reflected in USCIS’ website statistics—the online tool for checking the status of immigration cases is consistently among the most visited government websites, according to data published on analytics.usa.gov.

By providing people with easy access to updates on processing times for their case, USCIS can address a major concern and show customers it values their time. In 2018, USCIS began offering customers a specific date after which they can call to inquire about their case, rather than providing them with a broad range of estimated processing times, which can be confusing. The agency also began providing case status information to the first line of contact center representatives, rather than requiring those agents to escalate the call to more experienced USCIS officers. This change can help callers get the information they need more quickly.

- **Processing times for many immigration applications have increased.** The amount of time customers wait for USCIS to process their immigration case is also a challenge, according to agency officials. For example, the average processing time for the application for naturalization was 10.3 months in fiscal 2018, up from 8.1 months in fiscal 2017, according to USCIS data. More complex forms that take longer to process, as well as an increase in the number of applications received, are two factors contributing to longer wait times, according to agency officials. For example, the agency processed 850,000 naturalization applications in fiscal 2018, an 18% increase from 2014.
- **Customers want an easier way to secure office appointments online.** An immigration attorney with more than 20 years of experience working with applicants shared that he frequently tries to use the agency’s online system to book appointments for his clients and it requires some effort. “I’ve spent a lot of time in the system fruitlessly trying to get an appointment,” he said.

USCIS officials said they are aware of the issue and, as of August 2019, implemented a new process to improve the agency’s ability to resolve applicants’ inquiries through its contact center. Instead of scheduling appointments online, applicants can call the contact center to schedule appointments. The agency found agents can often resolve callers’ questions or concerns by phone, citing that only 2% of all inquiries to the contact center require an appointment at a field office. The agency also provides information on its website to help visitors understand the actions they can complete without an appointment.

Our scan of approximately 11,000 social media comments about citizenship and immigration services found many examples of posts that can help understand the customer experience, such as people complaining about difficulty in getting their issues resolved at the USCIS contact center and expressing praise for staff after being approved for citizenship or a green card. Here, we provide one example of a post that reinforces a theme in customer feedback identified in this profile. Along with other topics, our scan found many instances of customers asking questions and expressing confusion about case processing times.

For example:

**“@USCIS can you confirm the processing date for K1 visa, in Cali processing office? The website confused me.”**

*See page 10 for more information about our methodology.*

### PROMISING PRACTICE

#### USING VIRTUAL ASSISTANTS AND A CHAT FEATURE TO ANSWER CUSTOMERS’ QUESTIONS

In 2015, the U.S. Citizenship and Immigration Services launched “Emma,” the agency’s first virtual assistant. The Emma avatar sits at the top right corner of the USCIS website and provides answers to users’ questions, potentially saving customers from having to comb through the website or call contact center for information.

In fiscal 2018, the English-language Emma responded to more than 9 million inquiries from people who started more than 3 million “conversations.” A Spanish-speaking version responded to 2 million inquiries from people during more than 620,000 “conversations.” Emma has a success rate of 91% for answering questions posed in English, and 89% for answering questions posed in Spanish.

USCIS staff have continued to improve Emma and other aspects of the website. In 2018, for example, the agency launched a limited chat feature so customers who cannot get an answer from Emma can be connected to an agent immediately, without having to find a phone number and call the agency. USCIS also is considering more advanced ways to use Emma, such as having the virtual assistant help customers create online accounts allowing them to access personalized information and services.

- **Customers would like to complete what they need to do over the phone in a more timely and efficient manner**, according to USCIS' contact center survey. More than 35% of callers indicated it was difficult to do what they needed to do, and more than 40% did not think it took a reasonable amount of time to take care of their task.

One challenge for customers is navigating the interactive voice response system to complete basic self-service tasks, according to agency representatives and our review of social media comments. "Improving the experience of the callers to our contact center continues to be a priority and a challenge," said Vashon Citizen in April 2019. "Survey data and other feedback from the public cite the current IVR [system] experience as a key driver." Citizen is the chief of the contact center solutions branch in USCIS' Public Services Division.

The agency plans to launch a new IVR system by the second quarter of fiscal 2020, according to USCIS officials. The system will recognize English and Spanish, enabling speakers of either language to ask questions verbally rather than select from a fixed menu of options. The system will also be able to send customers emails or texts with USCIS website links for further information.

## Website Experience: How Easy Is It to Navigate and Understand Online Information?

In April 2019, the Partnership and Accenture partnered with the Center for Plain Language, a nonprofit organization that champions clear language, to conduct an analysis of selected USCIS web pages to determine how easy it would be for customers to navigate the website and to find, understand and act on information. Reviewers looked at the pages from the perspective of people with two different needs: applying for citizenship and applying for a green card with the intent of getting a full-time job.

USCIS GRADE  
(APRIL 2019)

A-

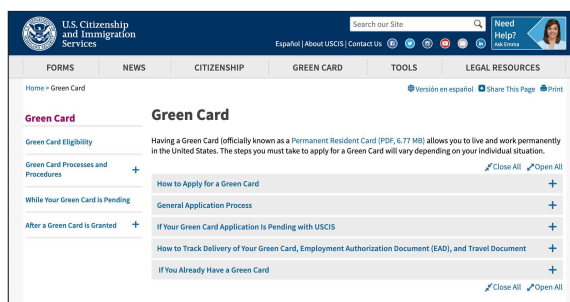
**Note:** In a separate study, the center examines a range of government websites annually and issues a Federal Plain Language Report Card. The average grade in calendar year 2018 was a "C."

See page 8 for more information on our methodology.

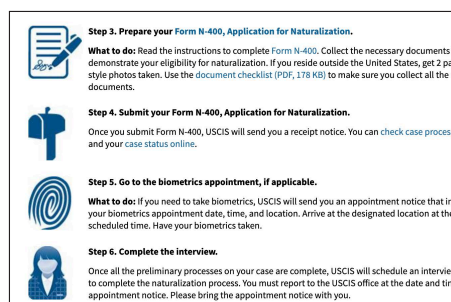
## What the Analysis Found

The web pages provide clear, well-described, chronological steps that effectively guide users through the complex process of applying for a green card and citizenship. For the most part, the pages are well-written, using short sentences and active voice. The web pages' links are clearly marked and presented, helping the site to remain uncluttered and making it easy for customers to understand what they should click to find more information.

At the same time, application processes need to be fully explained to give users the full confidence they need. For example, on the "Citizenship" page, the "what to do" steps (Figure 2) seem almost deceptively simple. Each could have more information that would give users a full answer to their questions and concerns. Additionally, some complex terms such as "biometrics" are not defined.



**Figure 1:** Good application of tools to help readers click for more information and not overwhelm them with text.



**Figure 2:** Clear, engaging, easy-to-follow structure highlighting the application process, although the "what to do" sections could provide more information, such as defining "biometrics."

## Indicators That Customer Experience Is a High Priority

The Partnership and Accenture developed the following list of indicators to understand how agencies are prioritizing customer experience and the steps they can take to improve. The list is based on research about effective customer experience practices in both government and the private sector and aligns with practices in a customer experience maturity self-assessment for agencies developed by the Office of Management and Budget. Leaders who participate in the Partnership's federal customer experience roundtable provided input.

See Appendix IV for more details on our methodology.

### Commitment to customer experience


The agency:

-  **Includes high-quality customer experience in its strategic goals.**


*The agency's strategic plan includes an objective to improve satisfaction with the delivery of information to the public. However, that objective focuses narrowly on the delivery of information rather than the full customer experience.*

-  **Specifies customer feedback as a key measure of the organization's performance.**


*The percentage of respondents satisfied with the support received from the USCIS Contact Center is a key performance measure.*

-  **Has a senior executive with the responsibility and authority to lead efforts to improve customer experience across the organization.**

*However, leaders in the Office of Citizenship and Applicant Information Services are responsible for efforts to educate and assist applicants.*

-  **Has a process for standardizing across channels the information and guidance provided to customers.**

*Efforts are in progress.*

-  **Shares meaningful customer feedback with the public.**

### Customer service basics

For the most common services provided, customers can:

-  **Complete frequently used transactions online.**

*For example, customers cannot submit green card applications online. Agency officials say they are working to make it possible to file more forms and applications online, including those related to green cards.*

-  **Easily find information to call an appropriate USCIS representative.**

-  **Schedule in-person appointments.**


*USCIS requires that all field office appointments be made by phone, so representatives can address issues that do not need to be resolved with an appointment.*


-  **Obtain status updates.**

*Customers can check the status of their cases online; however, the information available about how long processing will take is sometimes limited and difficult for customers to interpret.*

### Customer feedback


The agency collects and analyzes data and information on customer perceptions:

-  **Of specific interactions, including website visits, phone calls and in-person appointments.**

-  **Of the customer journey through a series of interactions or multistage processes.**

*Efforts to collect this information are in progress.*

-  **Of the overall service the organization provides.**

-  **Through qualitative research, such as customer interviews, focus groups, analysis of social media comments or direct observation.**

 Yes  No  Partially

# Customs Security and Screening Services



U.S. Customs and Border Protection, Department of Homeland Security

*This profile focuses on CBP's screening process and customer support provided through its website, contact center and other channels, as well as programs for expedited entry into the United States. Because this profile focuses on customer experience, CBP's performance on the border security aspects of its mission will not be addressed.*

## Summary

Any traveler who has returned bleary-eyed from an international trip, only to see a long, snaking line of passport-clutching people at customs, understands the importance of a good experience. In fiscal 2018, more than 413 million visitors or returning residents passed through customs, where agents did the screening to prevent potentially dangerous people and materials from entering the country.

Distinct from the Transportation Security Administration, which screens passengers before they board flights, the CBP screens people entering the United States. The CBP's screening counters and booths are the first point of contact for most people returning home or arriving for a visit, whether by airplane, boat or car, truck or trailer.

A majority of the people who responded to a traveler satisfaction survey conducted by CBP on the screening process expressed overall satisfaction, particularly commending the officers at checkpoints. Many travelers also had positive things to say about CBP programs, particularly those that expedite entry into the U.S., such as Global Entry, which provides faster security screening for low-risk passengers. The agency also benefits from these programs by being able to focus screening and inspection efforts on potentially higher-risk inspection issues.

In fiscal 2019, however, the agency had to deal with the five-week partial government shutdown that ran from December 2018 to January 2019, when many CBP employees were unable to work. The shutdown contributed to a backlog in applications for Global Entry that persists months later since, along with the shutdown, the agency had a record number of applications for Global Entry in 2018 and the first half of 2019.

The agency's website got mixed reviews. In customer surveys conducted by CBP, 55% of CBP website visitors rated it "above average" or "outstanding." Many users reported having trouble completing their intended task, often because they found the content difficult to understand. We experienced a similar challenge during our own analysis of selected CBP web pages.

### DID YOU KNOW?

If the more than 413 million travelers who passed through customs screening in fiscal 2018 stood in a line, that line would stretch around the earth more than six times.

## Service Overview<sup>1</sup>

### Key Services for Customs Security and Screening

- Security screening of international travelers as well as goods and cargo that cross U.S. borders.
- Application management of and enrollment in trusted traveler programs, such as the Global Entry program, that enable preapproved, low-risk travelers expedited clearance through customs.
- Management of the Electronic System for Travel Authorization, which determines the eligibility of visitors from certain countries to travel to the U.S. without a visa.
- Support provided to callers through the CBP Information Center.

### PRIMARY CUSTOMERS

International travelers crossing U.S. borders.

<sup>1</sup> Data provided by CBP for fiscal 2018

**CALLS****2.1 million**calls to the CBP  
Information Center**WAIT TIME****5.8 minutes**average wait time to speak  
with a representative**ONLINE VISITS****40.5 million**visits to  
CBP.gov<sup>2</sup>**FACE-TO-FACE CONTACTS****413.9 million**travelers processed by  
CBP officers at air, land  
and sea ports of entry

2 U.S. Customs and Border Protection, "CBP.gov Web Performance Metrics." Retrieved from <http://bit.ly/2KBI0uo>

## Social Media Presence

CBP interacts with the public through several social media channels including Twitter, Facebook, YouTube and Instagram. The agency provides tips and information for travelers through these accounts including on topics such as what people can bring through customs checkpoints and how to apply for Global Entry.

Because CBP's social media team is small, it has limited capacity to answer customer questions through the agency's social media accounts, according to Jennifer Gabris, the branch chief for digital engagement in CBP's office of public affairs. However, the team monitors social media accounts to analyze how the public uses the posts or the information—for example, by examining how widely particular posts are shared—and uses that information to improve future messages.

As of September 2019, the agency's social media presence includes:

**TWITTER****@CBP**

Joined: October 2008

Followers:

**258.1K**

Tweets:

**9.2K****FACEBOOK****@CBPgov\***

Joined: February 2018

Followers:

**85**

Likes:

**66****INSTAGRAM****@customsborder**

Joined: December 2014

Followers:

**84.8K**

Posts:

**924****YOUTUBE****U.S. Customs and  
Border Protection**

Joined: July 2009

Subscribers:

**16.7K**

Views:

**2.5M**

\*As of September 2019, CBP was in the process of merging their new Facebook page with their old page, which had more than 8,800 followers and 8,400 likes.



## Customer Feedback

Additional customer feedback information and insights were garnered through interviews with agency officials.

CBP collects customer feedback from many interactions with the public. While not all customer input is available publicly, the agency shares results from a survey of travelers entering or returning to the U.S. through selected airports, as well as from a survey of its website visitors.

### KEY TAKEAWAY

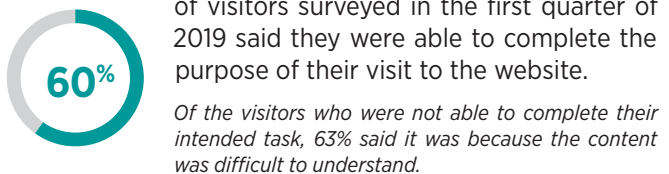
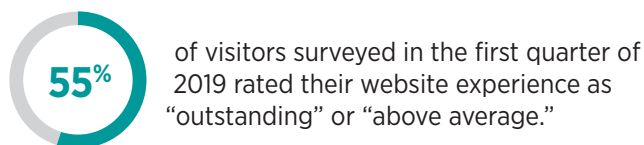
Travelers expressed satisfaction with many aspects of the screening experience but indicated the agency's website could be improved.

## Feedback on the Screening Experience at Ports of Entry<sup>3</sup>

Results are from a CBP Traveler Satisfaction Survey conducted in the summer of 2018 at 25 large international airports.



## Feedback on CBP.gov<sup>4</sup>



## Customer Experience Highlights

**Travelers commend the trusted traveler programs CBP offers** to expedite screening at U.S. airports and borders, according to agency officials. In addition to Global Entry, this includes programs such as Sentri and Nexus, which expedite travel between the U.S. and Mexico and Canada, respectively. In fiscal 2018, applications for Global Entry reached an all-time high with 1.7 million applications, according to John Wagner, deputy executive assistant commissioner at CBP.

Travelers who participated in the Global Entry program estimated waiting just over six minutes on average, compared with more than 11 minutes for travelers using automatic passport-control kiosks, and more than 14 minutes for travelers going through a standard inspection booth, according to CBP's summer 2018 Traveler Satisfaction Survey.

Our scan of more than 1,000 social media comments about customs security and screening services found examples of posts that can help understand the experiences of customers. Here, we provide a few specific examples of posts that reinforce themes in customer feedback identified elsewhere in the profile. Along with comments on other topics, our scan found many instances of customers praising the benefits of CBP's Global Entry program as well as some constructive criticism.

For example:

**"I use Global Entry and have used biometric boarding gates. Fast, simple, easy — as it should be."**

**"It would've been nice if @CBP told me my Global Entry interview at ORD was cancelled before I drove all the way up here."**

See page 10 for more information about our methodology.

<sup>3</sup> U.S. Customs and Border Protection, "Traveler Satisfaction Survey Report: Wave 4: Results, Findings and Recommendations," August 2018.

<sup>4</sup> U.S. Customs and Border Protection, "CBP.gov Web Performance Metrics." Retrieved from <http://bit.ly/2KBI0uo>

Note: The Partnership downloaded CBP's website performance metrics for each month in the first quarter of fiscal 2019 and calculated totals for the quarter.

## Opportunities to Improve the Customer Experience

- **Travelers recommend CBP officers be more pleasant and approachable**, according to CBP's Traveler Satisfaction Survey. More than 75% of travelers gave their interactions with CBP officers an excellent rating. Of the 24% of travelers who were dissatisfied with their interactions, nearly 70% indicated officers could be more friendly or welcoming. Travelers who were surveyed also mentioned insufficient staffing for the number of people who needed to be processed as another reason for their dissatisfaction.
- **The inspection areas where travelers are processed could be improved.** According to the Traveler Satisfaction Survey, people recommended improving the layout of the inspection areas with clearer signs directing passengers to the correct line. Travelers also indicated CBP should have more staff to help guide people through the entry process.

Along with a record number of Global Entry applications over the last two years, the five-week partial federal government shutdown in December 2018 through January 2019, during which many CBP staff were unable to work, contributed to a backlog in applications. CBP is working to reduce the logjam. While most applications took 15 days or fewer to process, as of July 2019 it took more than 90 days to process about 25% of applications, according to CBP officials. Some applications require more scrutiny. For example, people who change their address frequently require lengthier background checks.

### PROMISING PRACTICE

#### USING TECHNOLOGY TO SPEED UP THE SCREENING PROCESS FOR TRAVELERS

The U.S. Customs and Border Protection is rolling out facial recognition systems at major U.S. airports to screen people entering and leaving the country, providing a fast, paperless process designed to make the travel experience smoother and ensure people are who they say they are. The process works by matching passenger faces to a database of passport and visa photos, allowing officials to quickly verify passengers' identities.

Since the summer of 2017, the program has screened more than 13 million travelers with a nearly 99% accuracy rate. Travelers who do not have a photographic match with the database are required to present traditional documentation. The program also helped identify more than 7,000 visa overstays and revealed that 45 people were traveling with fraudulent documents.

While the agency is still working to address the security, transparency and privacy concerns posed by biometric technology, this effort is simplifying and speeding the screening experience for travelers, and could eliminate the need to present identification as they make their way through airports.

A key component of the effort's success was the attention paid to the experience of travelers as well as the interests of airlines, airports, the Transportation Security Administration and other partners, according to John Wagner, CBP's deputy executive assistant commissioner.

Earlier efforts to meet a congressional mandate to screen international travelers using biometrics struggled. Critical partners, including officials at airports and airlines, worried the program would slow boarding processes and create airport gridlock. But by focusing the program on goals such as creating a smoother experience for travelers and easing operations for airports and airlines, partners were clamoring to join the program rather than resisting, according to Wagner.

"We have taken a seemingly impossible security mandate, and we are accomplishing it by focusing on the traveler experience," Wagner said.

## Website Experience: How Easy Is It to Navigate and Understand Online Information?

In April 2019, the Partnership and Accenture partnered with the Center for Plain Language, a nonprofit organization that champions clear language, to conduct an analysis of selected CBP web pages. The center evaluated pages providing information on choosing and applying for CBP's trusted traveler programs as well as pages travelers use to submit applications for permission to enter the United States, which go through the Electronic System for Travel Authorization, an automated system used to determine visitor eligibility.

This review is distinct from the customer survey data from CBP's website, aiming instead to get a deeper understanding of people's experiences with key CBP web pages. Reviewers looked at the sites from the perspectives of three potential users: a Canadian trying to pick the best trusted traveler program; a member of the Global Entry program trying to log into the trusted traveler web page, through which travelers can apply for programs that allow members to use expedited lines at U.S. airports; and a person from Ireland who plans to travel for 60 days and seeks information about the Electronic System for Travel Authorization.

See page 8 for more information on our methodology.

**CBP GRADE  
(APRIL 2019)**

**B-**

**Note:** In a separate study, the center examines a range of government websites annually and issues a Federal Plain Language Report Card. The average grade in calendar year 2018 was a "C."

## What the Analysis Found

Overall, the site with information on the trusted traveler program enables users to complete the task of finding the most appropriate program efficiently. For example, users provide answers to a simple quiz to help them identify the best program for their circumstances. The content in the introductory pages is direct and functional, as is the design. However, the tone and the writing become bureaucratic and dense as users click into the site to access more information, and use of the passive voice makes the writing less lively.

The design of the pages is adequate but could be improved. For example, there are pages on which spacing makes it difficult for users to see the available information at a single glance. They may not be aware additional information exists if they do not scroll down.

The Trusted Traveler Programs (Global Entry, TSA Pre✓®, SENTRI, NEXUS, and FAST) are risk-based programs to facilitate the entry of pre-approved travelers. All applicants are vetted to ensure that they meet the qualifications for the program to which they are applying. Receiving a "Best Match" or program recommendation based on eligibility or travel habits does not guarantee acceptance into any Trusted Traveler program.

Not sure which one? Find the program that best suits your travel needs.

Citizenship	Average flights per year		Other considerations	
Which country are you a citizen of?	International Air	Domestic Air	Yearly trips to Canada	Yearly Trips to Mexico
<input type="text"/>	<input type="text"/> 0 Trips	<input type="text"/> 0 Trips	<input type="text"/> 0 Trips	<input type="text"/> 0 Trips
Do you have a passport (machine-readable)?	<input type="text"/>			
Are you a commercial driver?	<input type="text"/> No			
<input type="button" value="Show Best Match"/>			<input type="button" value="Reset"/>	

**Figure 1:** Easy tool to find the best trusted traveler program.

### WHAT IS THE ELECTRONIC SYSTEM FOR TRAVEL AUTHORIZATION (ESTA)?

To strengthen the security of travel to the United States under the Visa Waiver Program, requirements to travel visa-free have been enhanced. Nationals of Visa Waiver Program countries will still be eligible to travel without a visa but will have to obtain an approved travel authorization prior to their travel to the United States.

The Department of Homeland Security and the United States Customs and Border Protection have provided a secure public Web site with an automated form for you, or a third party, to complete in order to apply for a travel authorization. Once you enter the required biographic, travel, and payment information on the secure Web site, your application is processed by the system to determine if you are eligible to travel to the United States under the Visa Waiver Program without a visa. The system will provide you with an automated response, and prior to boarding, a carrier will electronically verify with the United States Customs and Border Protection that you have an approved travel authorization on file.

The Electronic System for Travel Authorization (ESTA) is an automated system used to determine the eligibility of visitors to travel to the United States under the Visa Waiver Program (VWP) and whether such travel poses any law enforcement or security risk.

ESTA approval authorizes a traveler to board a carrier for travel to the United States under the VWP. Private carriers must be a signatory visa waiver program carrier. See list of Signatory Carriers. CBP recommends that you apply for ESTA at the time you book your travel, but no less than 72 hours prior to boarding.

ESTA is not a visa. It does not meet the legal requirements to serve in lieu of a U.S. visa when a visa is required. Travelers that possess a valid U.S. visa may travel to the United States on that visa for the purpose it was issued. Travelers traveling on valid visas are not required to apply for an ESTA. In the same way that a valid visa does not guarantee admission to the United States, an approved ESTA is not a guarantee of admission to the United States.

ESTA became mandatory January 12, 2009. VWP applicants are required to complete a blue Customs declaration upon arrival in the U.S. whether or not they have an ESTA authorization. VWP travelers are no longer required to complete the green I-94W card.

Approved ESTA applications are valid for a period of two years, or until the passport expires, whichever comes first, and multiple trips to the United States without the traveler having to re-apply for another ESTA. When traveling to the U.S. with the approved ESTA, you may only stay for up to 90 days at a time - and there should be a reasonable amount of time between visits so that the CBP Officer does not think you are trying to live here. There is no set requirement for how long you must wait between visits.

Travelers whose ESTA applications are approved, but whose passports will expire in less than two years, will receive an ESTA valid until the passport's expiration date.

**Figure 2:** Dense and bureaucratic language.






## Indicators That Customer Experience Is a High Priority

The Partnership and Accenture developed the following list of indicators to understand how agencies are prioritizing the customer experience, and steps they can take to improve. The list is based on research about effective customer experience practices in both government and the private sector, and aligns with practices in a customer experience maturity self-assessment for agencies developed by the Office of Management and Budget. Leaders who participate in the Partnership's federal customer experience roundtable provided input.

See Appendix IV for more details on our methodology.





### Commitment to customer experience

The agency:

-  **Includes high-quality customer experience in its strategic goals.**
-  **Specifies customer feedback as a key measure of the organization's performance.**
-  **Has a senior executive with the responsibility and authority to lead efforts to improve customer experience across the organization.**  
*CBP has an executive who leads the stakeholder experience initiative as part of the agency's strategic plan, but stakeholder experience is not that position's primary responsibility.*
-  **Has a process for standardizing across channels the information and guidance provided to customers.**
-  **Shares meaningful customer feedback with the public.**




### Customer service basics

For the most common services provided, customers can:

-  **Complete frequently used transactions online.**  
*People can complete online applications for trusted traveler programs such as Global Entry, but for security purposes must do in-person interviews at enrollment centers to verify identity.*
-  **Easily find information to call an appropriate representative.**  
*A phone number for the CBP Info Center is easy to find on the website, but there is no description of the types of issues callers can inquire about.*
-  **Schedule in-person appointments.**  
*People can schedule appointments for visits to trusted traveler enrollment centers.*
-  **Obtain status updates.**  
*Customers can check online for the status of their trusted traveler applications.*

### Customer feedback

The agency collects and analyzes data and information on customer perceptions:

-  **Of specific interactions, including website visits, phone calls and in-person appointments.**
-  **Of the customer journey through a series of interactions or multistage processes.**
-  **Of the overall service the organization provides.**
-  **Through qualitative research, such as customer interviews, focus groups, analysis of social media comments or direct observation.**

 Yes  No  Partially

# Federal Student Aid Application Services

Office of Federal Student Aid, Department of Education



## Summary

The federal government administers critical financial aid programs for Americans and, with college costs skyrocketing, financial assistance is vital for many students. In the fall of 2018, more than 12 million students who headed off to college received grants, loans or work-study funds from the Office of Federal Student Aid.

A good customer experience with FSA can ensure students are able to complete the Free Application for Federal Student Aid form, get the financial aid they need, understand their repayment obligations and repay their loans. The office was one of the first federal government organizations to create a chief customer experience officer position, making customer experience a top strategic priority.

FSA does not publish much of the customer feedback it receives, possibly due to restrictions from the Paperwork Reduction Act. But officials report high customer satisfaction with the financial aid application process based on customer surveys. FSA streamlined the process over the past 10 years, making it easier for people to complete the financial aid form and retrieve the tax data they need to do so. In addition, web pages related to applying for student aid offer clear, easily understandable information, according to our analysis.

Yet challenges remain. FSA surveys and other customer research indicate the complex and fragmented nature of the student aid system can confound people seeking assistance for themselves or others. They often must interact with multiple loan-servicing providers and websites in their attempts to apply for, access or repay student aid. FSA is addressing this issue through its Next Generation Financial Services Environment initiative, a single online platform for customers aimed at simplifying the process of applying for and managing student loans.

### DID YOU KNOW?

Nearly 60% of high school seniors apply for a federal student loan.

## Service Overview<sup>1</sup>

### Key Services for Federal Student Aid

- Acceptance and processing of applications for federal student aid.
- Information and answers to questions about aid programs and the application process.
- Borrower assistance for managing and repaying student loans (e.g., estimating payments, understanding repayment options and processes, assisting borrowers struggling to repay loans).
- Disbursement of student aid payments to colleges, universities, and career and technical schools.
- Outreach and training students, families, schools and communities about federal student aid programs, products and services.
- Assistance through a neutral, informal and confidential ombudsman group for resolving disputes about federal student aid.

### PRIMARY CUSTOMERS

Students and their families who need financial assistance for higher education, and borrowers who are repaying student loans.

<sup>1</sup> Data provided by FSA for fiscal year 2018.

**CALLS****>30 million**calls typically received at FSA  
contact centers annually**WAIT TIME****—**

not provided by FSA

**ONLINE VISITS****44.5 million**

visits to StudentAid.gov

**FACE-TO-FACE CONTACTS****N/A**FSA does not have  
field offices**APPLICATIONS FOR STUDENT  
AID PROCESSED****18.6 million****TOTAL BORROWERS WITH FEDERAL  
STUDENT LOANS OUTSTANDING****43 million****Social Media Presence**

Twitter and Facebook accounts help FSA find and fix student aid issues quickly, before they become larger problems, with the help of a social media team that troubleshoots challenges that arise. “Our team is often the canary in the coal mine. We are able to hear about issues on social media before they even hit our call centers,” said Ed Pacchetti, director of customer analytics at FSA. “This enables us to flag any issues that come in and send them to our website developers, so we can fix anything right away.”

The team also responds to questions, points customers in the right direction for information and periodically holds Twitter chats to answer questions about the financial aid process. Along with using Twitter and Facebook to distribute content and answer questions, FSA also engages with customers through a YouTube channel.

As of September 2019, the agency’s social media presence includes:

**TWITTER****@FAFSA**

Joined: September 2010

Followers:

**152.3K**

Tweets:

**43.9K****FACEBOOK****@FederalStudentAid**

Joined: October 2011

Followers:

**448.6K**

Likes:

**450.1K****YOUTUBE****Federal Student Aid**

Joined: January 2007

Subscribers:

**26.3K**

Views:

**7.6M**



## Customer Feedback

Federal Student Aid publishes an overall customer satisfaction score for the entire student aid life cycle, which includes the perspectives of customers from three points in that cycle: applying for aid, currently attending school and repaying loans. FSA does not publish more detailed feedback possibly due to restrictions imposed by the Paperwork Reduction Act.



### Customer satisfaction score across the student aid life cycle: **70.6 out of 100** (fiscal 2018)<sup>2</sup>

*This score is slightly higher than the office's 2017 score of 69.9 as well as the federal government's 2018 average score on the American Customer Satisfaction Index of 68.9.*

*Additional customer feedback information and insights were garnered through interviews with agency officials.*

<sup>2</sup> The survey was conducted by the American Customer Satisfaction Index. FSA's score is weighted based on the volume of borrowers (70% of the measure), applicants (25% of the measure) and students (5% of the measure) using FSA's services.

## Customer Experience Highlights

- FSA has made strides over the past 10 years to make it **quicker and easier for customers to complete the Free Application for Federal Student Aid**. They have done so by streamlining the form and enabling users to automatically import key information.
- **Customers give FSA positive feedback on the financial data retrieval tool** that is a part of the application for federal student aid. The tool was created out of a partnership with the Internal Revenue Service and enables applicants to automatically import their verified tax data into the application.

Our scan of approximately 13,000 social media comments about federal student aid services found examples of posts that can help understand the customer experience, such as people expressing confusion with eligibility criteria for aid, highlighting technical errors or login issues when submitting information through FAFSA.gov, and conveying gratitude after receiving student aid. Here, we provide one example of a post that reinforces a theme in customer feedback identified in this profile. Along with other topics, our scan found many instances of customers citing confusion with the FAFSA.

For example:

**“You would think after doing it for four years of undergrad, I would understand all this loan application and FAFSA nonsense and wouldn’t stress cry constantly? But you would be wrong.”**

*See page 10 for more information about our methodology.*

## Opportunities to Improve the Customer Experience

- **Customers remain frustrated by the fragmented nature of the student aid system,** FSA officials said. The system requires users to interact with multiple loan repayment contractors and websites over the life of a student loan. In November 2017, the office launched NextGen, a multiyear initiative to consolidate and simplify this end-to-end process using leading human-centered design methods and tools.
- Despite a high score for FSA's website in our analysis below, and its efforts to streamline the FAFSA application, some customers still complain about **jargon and difficult terms in the application.** "We are working to find clearer ways to ask certain questions but, in many cases, we are legally required to word certain questions certain ways," Pacchetti said.

### PROMISING PRACTICE

#### SIMPLIFYING A FRAGMENTED, COMPLEX PROCESS

Through its NextGen initiative, FSA is responding to customer complaints about the complex and fragmented system they must navigate over the life of their student loans. The initiative seeks to create a single online platform through which customers can apply and manage their loans until they are paid off.

Since the initiative was launched in November 2017, among other projects, FSA has rolled out a new mobile application for customers to submit a FAFSA form, view their federal student loan history and compare information about schools, such as tuition costs and graduation rates, activities that previously required visits to multiple sites. The app has received positive feedback, and the agency continues to make improvements based on user feedback, according to FSA officials. As of August 2019, the mobile app had a rating of 4 out of 5 stars for Android users, and 3.1 out of 5 stars for Apple users.

# Website Experience: How Easy Is It to Navigate and Understand Online Information?

In April 2019, the Partnership and Accenture partnered with the Center for Plain Language, a nonprofit organization that champions clear language, to conduct an analysis of how easy it would be for student aid applicants to understand and navigate selected FSA web pages. Reviewers looked at the sites from the perspective of a high school junior trying to learn about student aid options. We did not review content in the FAFSA application itself.

See page 8 for more information on our methodology.

**Note:** In a separate study, the center examines a range of government websites annually and issues a Federal Plain Language Report Card. The average grade in calendar year 2018 was a “C.”

FSA GRADE  
(APRIL 2019)

A

## What the Analysis Found

The FAFSA site is a model of clarity, organization and brevity. It allows users to confidently find their way through an unfamiliar and potentially overwhelming process of estimating eligibility for aid, submitting an application and maintaining eligibility over time. The website is easy to navigate and well-designed, and uses plain language.

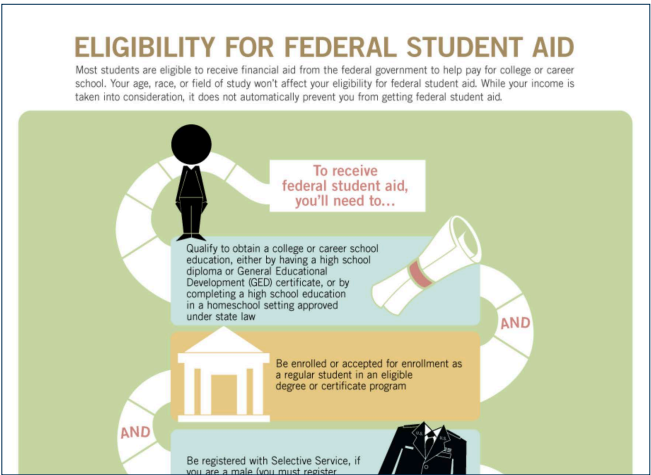


Figure 1: An engaging chart that guides users.

Coverdell Education Savings Account
A <a href="#">Coverdell Education Savings Account</a> allows up to \$2,000 a year to be put aside for a student's education expenses (elementary, secondary, or college or career school).
Qualified Tuition Programs (QTPs; also known as 529 Plans)
A QTP/529 plan is established by a state or school so that you can either prepay or save up to pay education-related expenses. Once you're in college or career school and you withdraw money from your account to pay your education expenses, the money you withdraw will not be taxed. Learn more about <a href="#">state 529 plans</a> ®. To find out whether the college you plan to attend participates in a QTP, ask the financial aid or admissions staff.
Student Loan Interest Deduction

Figure 2: Jargon and difficult terms are defined clearly.

## Indicators That Customer Experience Is a High Priority

The Partnership and Accenture developed the following list of indicators to understand how agencies are prioritizing the customer experience, and steps they can take to improve. The list is based on research about effective customer experience practices in both government and the private sector, and aligns with practices in a customer experience maturity self-assessment for agencies developed by the Office of Management and Budget. Leaders who participate in the Partnership's federal customer experience roundtable provided input.

See Appendix IV for more details on our methodology.

### Commitment to customer experience

The office:

- ✓ **Includes high-quality customer experience in its strategic goals.**
- ✓ **Specifies customer feedback as a key measure of the organization's performance.**  
*Overall satisfaction throughout the student aid life cycle is a key performance measure.*
- ✓ **Has a senior executive with the responsibility and authority to lead efforts to improve customer experience across the organization.**
- ✗ **Has a process for standardizing across channels the information and guidance provided to customers.**  
*Efforts are underway through the Next Generation Financial Services Environment initiative.*
- ✗ **Shares meaningful customer feedback with the public.**  
*FSA publishes only high-level customer survey results, possibly due to restrictions imposed by the Paperwork Reduction Act.*

### Customer service basics

For the most common services provided, customers can:

- ✓ **Complete frequently used transactions online.**  
*Customers can apply for student aid online, estimate repayment costs, get updates on the status of their loans and payments, and apply for income-driven repayment plans.*
- ~ **Easily find information to call an appropriate representative.**  
*Due to the fragmented nature of federal student aid, customers must call different contact centers and phone numbers to address different topics. FSA's website provides descriptions of which numbers to call to get help with specific issues.*
- N/A **Schedule in-person appointments.**  
*Not applicable. Federal Student Aid does not have field offices.*
- ✓ **Obtain status updates.**  
*Customers can check the status of their student aid applications online.*

### Customer feedback

The office collects and analyzes data and information on customer perceptions:

- ✓ **Of specific interactions, including website visits, phone calls and in-person appointments.**
- ✓ **Of the customer journey through a series of interactions or multistage processes.**
- ✓ **Of the overall service the organization provides.**
- ✓ **Through qualitative research, such as customer interviews, focus groups, analysis of social media comments or direct observation.**

✓ Yes ✗ No ~ Partially

# Individual Taxpayer Services

Internal Revenue Service  
Department of Treasury



## Summary

Virtually every U.S. worker interacts with the Internal Revenue Service at least once a year, and many of them have far more contact as they seek help with finding the right tax forms, figuring out what tax information they need to submit and resolving other issues. In fiscal 2018, taxpayers filed an estimated 250 million tax returns, called the agency for service more than 77 million times, and made nearly 3 million visits to Taxpayer Assistance Centers.

The IRS, whose vital role is to collect the taxes that help pay for our national defense, federal infrastructure, medical research and other important national needs, got high marks from customers for some services in fiscal 2018. Nearly 90% of customers were satisfied with their interactions with IRS employees they reached by phone or visited at assistance centers. Equally impressive is the fact that customers waited an average of only seven minutes to talk with an IRS representative in fiscal 2018 compared with 30 minutes in fiscal 2015. This reduction in wait time can be attributed to an infusion of resources and staffing after several years of budget cuts.

Despite these improvements, the 2019 tax filing season presented challenges, mostly due to factors outside of the agency's control. The IRS had to implement sweeping new tax law provisions for the 2019 tax season, while also dealing with the effects and aftereffects of a partial government shutdown that sent more than 85% of its workforce home for the majority of the five-week period from December 2018 to January 2019. The agency had to cancel thousands of taxpayer appointments and, when it reopened, callers experienced longer wait times and more difficulty getting through to representatives than they had during the 2018 filing season.

The agency took steps to ensure tax law changes did not negatively affect customer service during the 2019 filing season, implementing a proactive communications campaign to get ahead of frequent taxpayer questions and partnering with professionals who help taxpayers with their tax law questions. Consistent, accurate information disseminated through these channels reduced the need for people to call the agency, according to IRS officials.

The IRS' web pages could be more user friendly, according to our analysis of selected pages. Additionally, taxpayers were sometimes unable to take advantage of online services because they lacked the documentation needed to meet the requirements for verifying their identity. The IRS is exploring more convenient ways to provide needed security for its online services.

### DID YOU KNOW?

We estimate that in tax filing season, the IRS averages about 254 calls every minute.

## Service Overview<sup>1</sup>

### Key Services

- Tax-return processing.
- Tax payment collection and processing.
- Tax refund processing and assistance with inquiries about refund status.
- Access to tax records for individuals and businesses.
- Answers to taxpayer questions about how to fulfill tax responsibilities.

### PRIMARY CUSTOMERS

Individuals, businesses, nonprofits and charities that must file taxes as well as tax professionals and organizations that help prepare taxes.

<sup>1</sup> Data is from fiscal 2018.

**CALLS<sup>2</sup>****77.7 million**attempted calls to the IRS  
customer service line**WAIT TIME<sup>3</sup>****7.5 minutes**average time to speak with  
a representative**ONLINE VISITS<sup>4</sup>****608.8 million**

visits to IRS.gov

**FACE-TO-FACE CONTACTS<sup>5</sup>****2.9 million**contacts through IRS  
Taxpayer Assistance Centers**RETURNS<sup>6</sup>****>250 million**tax returns and supplemental  
documents filed

<sup>2</sup> Internal Revenue Service, "National Taxpayer Advocate Annual Report to Congress: 2018," 23-29. Retrieved from <http://bit.ly/2KJAc8N>

<sup>3</sup> Ibid.

<sup>4</sup> Internal Revenue Service, "2018 Data Book." Retrieved from <http://bit.ly/2OX807F>

<sup>5</sup> Internal Revenue Service, "National Taxpayer Advocate Annual Report to Congress: 2018," 26. Retrieved from <http://bit.ly/2KJAc8N>

<sup>6</sup> Internal Revenue Service, "2018 Data Book." Retrieved from <http://bit.ly/2OX807F>

## Social Media Presence

The IRS engages with customers on Twitter, Facebook, Instagram and YouTube. The agency uses social media primarily to inform and educate the public about tax-related issues and to identify common questions and concerns that can be addressed through other channels. Social media comments often provide an early indication of problems or concerns taxpayers are experiencing with an IRS-related matter. The IRS does not resolve or address individual customer issues through social media, given privacy concerns.

As of September 2019, the agency's social media presence includes:

**TWITTER****@IRSnews**Joined:  
September 2009

*IRS news and guidance  
for the public, press and  
practitioners, such as  
accountants or others  
who represent taxpay-  
ers before the IRS.*

Followers:

**108K**

Tweets:

**39.3K****@IRStaxpros**

Joined: March 2009  
*IRS news and guidance  
for tax professionals.*

Followers:

**59.6K**

Tweets:

**12.3K****@IRSenEspanol**

Joined: May 2009

Followers:

**9.3K**

Tweets:

**4.4K****INSTAGRAM****@IRSNews**

Joined: November 2018

Followers:

**10.1K**

Posts:

**227****FACEBOOK****@IRS**

Joined: September 2010

Followers:

**127K**

Likes:

**114K****FACEBOOK****@IRSenEspanol**

Joined: September 2017

Followers:

**1.2K**

Likes:

**1.0K****YOUTUBE****IRSVideos**

Joined: April 2009

Subscribers:

**32.5K**

Views:

**3.3 Million**

**Note:** The IRS has two other Twitter handles: @IRSsmallbiz, @IRSTaxSecurity; and two other YouTube channels: IRSVideosmultilingua and IRSVideosASL.



## Customer Feedback

The IRS collects customer feedback from many of the channels the agency offers to the public. While it does not publish much of this feedback, possibly due to restrictions imposed by the Paperwork Reduction Act, it does publish the following high-level customer satisfaction scores.



Satisfaction rate for taxpayers who talked with an agent on the IRS' primary customer service line (fiscal 2018)<sup>7</sup>



Customer satisfaction with walk-in taxpayer assistance centers (fiscal 2018)<sup>8</sup>

Additional customer feedback information and insights were garnered through interviews with agency officials, our own analysis of IRS online tools and websites, and reports from the Taxpayer Advocate, an independent unit within the IRS that gives voice to taxpayer concerns.

<sup>7</sup> Internal Revenue Service, "2018 Data Book," 57. Retrieved from <http://bit.ly/2OX807F>

<sup>8</sup> Metric provided by the IRS.

## Customer Experience Highlights

- **Customers can easily check the status of their tax refunds.** The agency provides multiple ways to check refund status, including a "Where's my refund?" tool on IRS.gov, the IRS2Go mobile app and the IRS refund hotline. Customers use these options extensively—more than 350 million refund status updates were requested through the IRS2Go mobile app and the IRS.gov website between January and June 2019.
- **The IRS has reduced the wait time for in-person appointments** by helping more people resolve their issues over the phone. In fiscal 2017, IRS contact center representatives began scheduling taxpayer appointments for its Taxpayer Assistance Centers, with the goal of helping these callers address their issues over the phone without having to come in. In fiscal 2018, representatives were able to resolve taxpayers' issues by phone during more than half the calls. Wait times for in-person appointments fell by 30% and 94% of walk-ins and customers with appointments met with an IRS representative within 30 minutes in fiscal 2018.

Our scan of nearly 26,000 social media comments about taxpayer services found examples of posts that can help understand the customer experience, such as people expressing confusion about what tax form to use and complimenting the agency on delivering a speedy refund. Here, we provide one example of a post that reinforces a theme in customer feedback identified in this profile. Along with other topics, our scan revealed positive comments about services provided at in-person taxpayer assistance centers, including the process for scheduling appointments and the quality of service representatives provided.

For example:

**"Wow I am pleasantly surprised and never expected an interaction to go so well with the IRS. I came to the San Jose branch this morning and noticed signs for 'appointments only.' So I called the appointment line to schedule, and got someone on the line in less than 5 minutes! Not only that but the agent asked why I wanted to schedule an appointment and when I told her, she pulled up my account and answered my questions!!! Amazing experience!"**

*See page 10 for more information about our methodology.*

- **Increases in the budget and staff at call centers, and operational efficiencies, reduced caller wait times.** The average wait time dropped to seven minutes in fiscal 2018 from 30 minutes in fiscal 2015. The IRS' budget was cut by nearly 7% in the five years leading up to fiscal 2015, but starting in fiscal 2016, the IRS received additional funding, including \$176 million toward improving taxpayer services.
- **Taxpayers commend the professionalism of IRS employees,** consistently giving high ratings to the people they interact with at both call centers and taxpayer assistance centers, according to Jim Clifford, the IRS director of customer account services, and Dietra Grant, director of customer assistance, relationships and education, both in the IRS' Wage and Investment Division.

## Opportunities to Improve the Customer Experience

- **Stringent security measures hinder taxpayers' online access to their accounts and IRS services**, requiring them to call or visit an assistance center. Only 20% of customers' first attempts to verify their identity through the IRS' online system are successful, according to the National Taxpayer Advocate. In many cases, customers did not realize how much documentation they needed to verify their identity. In some cases, they did not have the required documentation, such as an account number for a credit card or a home mortgage in their name.

The IRS is striving to improve its secure online services by using “step-up” authentication, according to Clifford. This approach enables taxpayers to access basic information without a rigorous identity check. However, they must pass more rigorous authentication to resolve detailed, account-specific questions.

- **Some IRS website pages are cluttered with dense and complex information**, making it harder for taxpayers to find information quickly and efficiently, according to our analysis. According to agency officials, the IRS continually evaluates the experiences of website visitors through surveys, user testing, evaluation of operational data and other methods, and uses that feedback to improve the online experience. For example, the IRS redesigned website content around the top reasons people call the agency, so people can more easily find the information they need and will not have to call the agency for answers.
- **It can be difficult to reach an IRS representative for assistance during the busy tax season.**

While the IRS has improved telephone access for tax services during most of the year, during the 2019 tax season about one-third of callers to the accounts management line who were routed to an agent for assistance were unable to get through, according to the National Taxpayer Advocate.<sup>9</sup> This number was 13% higher than the previous year, partially due to the long-term impact of the 2018-2019 government shutdown, when many IRS employees were furloughed.

Our scan of comments on social media found many instances of people struggling to reach an IRS representative.

For example:

**“@IRSnews I need help, if I am expecting a refund and my banking info was wrong , is it possibly to call and correct the info? I am not having any luck reaching a person and I've been calling for a week”**

*See page 10 for more information about our methodology.*

- **The agency had to cancel more than 16,000 taxpayer appointments during the partial government shutdown** that ran from December 2018 to January 2019, according to a report by the National Taxpayer Advocate. When the agency reopened, callers experienced longer wait times, and fewer calls to representatives got through compared with the 2018 filing season.

### PROMISING PRACTICE

#### GETTING AHEAD OF TAXPAYER QUESTIONS ABOUT TAX LAW CHANGES

In response to tax law changes passed in fiscal 2015, the IRS launched coordinated communication campaigns to educate citizens and lessen the need for people to call the agency. The IRS posted information on its website and social media accounts on how taxpayers would be affected by the new law, and partnered with private sector businesses, such as tax-software companies, to ensure taxpayers were getting useful and consistent information.

Rather than seeing an increase in calls to the IRS in fiscal 2017 about the law's effect on taxpayers, the number of calls dropped by nearly 19% from the previous year. Other factors may have contributed to the drop, but agency leaders believe the communications strategy played a significant role.

During the 2019 tax filing season, this same approach helped limit the number of calls about the major tax reform legislation passed in late 2017, according to Jim Clifford, the IRS director of customer account services. In fact, the IRS received nearly 2 million fewer calls in the 2019 filing season compared with the 2018 filing season, despite the changes in tax law.

<sup>9</sup> Internal Revenue Service, “Fiscal Year 2020 Objectives Report to Congress – Volume 1.” Retrieved from <http://bit.ly/2H9hk1Q>

## Website Experience: How Easy Is It to Navigate and Understand Online Information?

In April 2019, the Partnership and Accenture partnered with the Center for Plain Language, a nonprofit organization that champions clear language, to conduct an analysis of selected IRS web pages that provide information on how to file taxes. Reviewers looked at the pages from the perspectives of two taxpayers: one who wants to e-file for the first time and take a mortgage deduction, and one who wants to learn about options for paying taxes owed.

IRS GRADE  
(APRIL 2019)

C+

**Note:** In a separate study, the center examines a range of government websites annually and issues a Federal Plain Language Report Card. The average grade in calendar year 2018 was a “C.”

See page 8 for more information on our methodology.

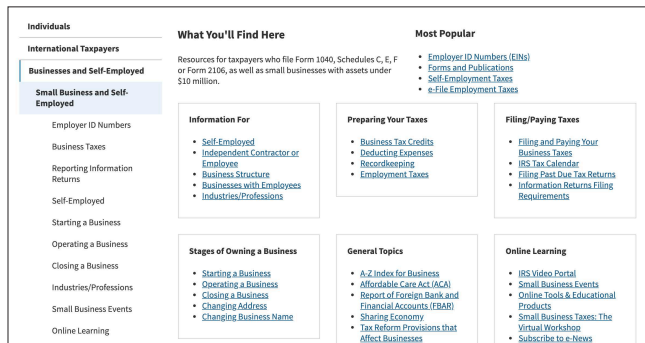
### What the Analysis Found

Taxpayers can find a range of useful information and resources on the IRS website. For example, the high-level navigation options on the sites primary pages work well. These options focus on major taxpayer needs, such as “File” and “Pay.”

But as the customer drills down into the website, the information and presentation become denser and more complex. We found that tasks often take more clicks than necessary, and the site’s busy appearance can be overwhelming.

In places, the site is missing key terms, such as “mortgage deduction,” in the headers of relevant sections. Use of familiar terms to identify content would help users find information more easily. Reviewers also found it difficult to locate the appropriate number to call the IRS.

The agency could improve customers’ ability to file their taxes, an already complex task, by making it easier and quicker to use the site.



**Figure 1:** An overwhelming page with many hyperlinks.



**Figure 2:** Mortgage deduction information is hard to find because it is grouped under “itemized deductions,” which may be an unfamiliar term for some users.

## Indicators That Customer Experience Is a High Priority

The Partnership and Accenture developed the following list of indicators to understand how agencies are prioritizing the customer experience, and steps they can take to improve. The list is based on research about effective customer experience practices in both government and the private sector, and aligns with practices in a customer experience maturity self-assessment for agencies developed by the Office of Management and Budget. Leaders who participate in the Partnership's federal customer experience roundtable provided input.

See Appendix IV for more details on our methodology.

### Commitment to customer experience

The agency:

- ✓ **Includes high-quality customer experience in its strategic goals.**
- ✓ **Specifies customer feedback as a key measure of the organization's performance.**  
*The IRS includes customer satisfaction with its accounts management line and its Taxpayer Assistance Centers in its strategic plan.*
- ✗ **Has a senior executive with the responsibility and authority to lead efforts to improve customer experience across the organization.**  
*The IRS has a commissioner for the Wage and Investment Division whose work spans some, but not all, of the agency's primary service delivery channels.*
- ✓ **Has a process for standardizing across channels the information and guidance provided to customers.**  
*The IRS uses a Customer Early Warning System that allows staff who work with customers to identify issues and update information across channels.*
- ✗ **Shares meaningful customer feedback with the public.**  
*The IRS publishes only high-level customer survey results, possibly due to restrictions imposed by the Paperwork Reduction Act.*

### Customer service basics

For the most common services provided, customers can:

- ✓ **Complete frequently used transactions online.**  
*Customers can go online and check the status of tax refunds, view their tax accounts, make payments and ask questions about tax law.*
- ~ **Easily find information to call an appropriate representative.**  
*The IRS provides phone numbers for its services, our review of the agency website found it was difficult to find these numbers.*
- ✓ **Schedule in-person appointments.**
- ✓ **Obtain status updates.**  
*Customers can get online updates on the status of their tax refunds.*

### Customer feedback

The agency collects and analyzes data and information on customer perceptions:

- ✓ **Of specific interactions, including website visits, phone calls and in-person appointments.**
- ✓ **Of the customer journey through a series of interactions or multistage processes.**
- ✓ **Of the overall service the organization provides.**
- ✓ **Through qualitative research, such as customer interviews, focus groups, analysis of social media comments or direct observation.**

✓ Yes ✗ No ~ Partially

# Medicare Customer Support Services



Centers for Medicare and Medicaid Services  
Department of Health and Human Services

*This profile focuses on the range of online and over-the-phone customer support services provided to people with Medicare, and does not address health care services people receive at doctors' offices, hospitals or other providers. The profile does not discuss the experience with Medicaid, a state-based health coverage program for low-income people.*

## Summary

Signing up for Medicare is a big turning point in the lives of Americans who become eligible for the largest health insurance provider in the United States when they turn 65. The program currently serves more than 60 million customers, also providing health insurance to people younger than 65 who have certain disabilities and illnesses.

To get Medicare information and services, people can call the 1-800-MEDICARE contact center or use Medicare's website and mobile applications. Customers express satisfaction with many of their Medicare interactions, such as getting answers to their questions about covered services and the enrollment support they get through the 1-800-MEDICARE line, according to customer feedback and CMS survey responses. Customers also commend contact center representatives for being courteous, well-informed and helpful.

Medical and health insurance language can be highly technical, and our analysis of select Medicare web pages reveals CMS could do better at using plain language to communicate with customers. In October 2018, CMS identified Medicare online services as an area for improvement and launched a major initiative called eMedicare to help people complete tasks and get online information more easily.

### DID YOU KNOW?

Approximately 10,000 people enroll in Medicare every day.

## Service Overview<sup>1</sup>

### Key Services

- Answers to questions about the medical services, tests and drugs Medicare covers.
- Help with understanding coverage options and shopping for, comparing and enrolling in Medicare health plans or Medicare prescription drug plans or both.
- Information about Medicare premiums.
- Assistance with finding and comparing Medicare health care providers.
- Assistance with coordinating Medicare benefits.
- Information and answers to questions about claims and payments.

### PRIMARY CUSTOMERS

Individuals enrolled or seeking to enroll in Medicare, and their caregivers.

<sup>1</sup> Data provided by the CMS for fiscal 2018.

**CALLS****23.8 million**

calls to the  
1-800-MEDICARE  
call center

**WAIT TIME****3.5 minutes**

average time to speak with  
a representative at the  
1-800-MEDICARE  
call center

**ONLINE VISITS****412.8 million**

visits to  
Medicare.gov

**FACE-TO-FACE CONTACTS****N/A**

Medicare does not have  
field offices

---

**Social Media Presence**

CMS has a social media presence for the Medicare program on Facebook and Twitter that keeps people updated on programs and benefits. For example, social media posts have highlighted new online tools, informed customers about Medicare access when abroad and provided reminders to get flu shots.

For the protection and security of people's personal and potentially sensitive health information, the agency does not answer individual Medicare account questions or resolve account issues on social media channels. Instead, the agency redirects customers to Medicare's website and call center for individual questions.

As of September 2019, Medicare's social media presence includes:

**TWITTER****@MedicareGov**


---

 Joined: June 2011

Followers:

**32K**

Tweets:

**6K****FACEBOOK****@medicare**


---

 Joined: February 2015

Followers:

**411K**

Likes:

**412K**



## Customer Feedback

CMS collects data and feedback from customer interactions but does not publish any of that data possibly due to restrictions imposed by the Paperwork Reduction Act. However, interviews with agency officials provided the following information on progress and challenges:

### Customer Experience Highlights

- **Call center representatives received high marks for their courtesy and knowledge** about the services covered under different Medicare plans, according to surveys offered at the end of calls. Nearly 90% of respondents rate their overall experience with Medicare customer service as “very good” or “excellent.” Callers are typically pleased with the support they get from Medicare representatives over the phone, said Erin Bradshaw of the Patient Advocate Foundation, an organization that helps guide patients through health care issues, including their interactions with Medicare.
- **People appreciate the “Medicare and You” handbook**, according to CMS officials. The handbook helps customers understand how to apply for and renew Medicare coverage, what tests and services are covered under the program, and more. Customers can download a digital handbook or request a hard copy from the Medicare contact center.

#### PROMISING PRACTICE

##### CREATING A SEAMLESS EXPERIENCE BY CONNECTING CUSTOMER CONTACT POINTS

CMS leadership strives to create a good customer experience, particularly for people calling the agency’s 1-800-MEDICARE line, since many people with Medicare prefer receiving services over the phone.

That said, about two-thirds of people with Medicare use the internet daily or almost daily, according to data CMS collects. With CMS’s eMedicare initiative enabling people to go online and text with Medicare representatives, the agency plans to integrate those options with the contact center for a unified experience.

“Our intent is not to replace traditional channels that beneficiaries trust and depend on, but to improve and enhance them with the emerging digital options to create a user-centered, seamless consumer experience,” said CMS Administrator Seema Verma in a press release about eMedicare.

As one example, the agency recently launched new capabilities to send callers text messages following a call to help them complete tasks discussed during the interaction. For example, a Medicare text could provide instructions on changing an address, a task the Social Security Administration, not Medicare, manages.

CMS is also improving a webchat option launched several years ago on the website MyMedicare.gov, which enables users to create accounts and access personalized information. The webchat feature originally helped users connect with contact center representatives for help with logging in, navigating the website or completing other basic online tasks.

After evaluating the experiences of individuals who used the webchat feature, officials learned many of them had to call the 1-800-MEDICARE phone line because the webchat agent was not authorized to address the issue. Medicare recently expanded the scope of services available through a webchat. For example, the agents now advise people which Medicare plan might be best for them and answer basic questions about differences among plans and the types of drugs that are covered.

These changes contributed to a drop in the number of webchats that led to a referral to the contact center, according to agency officials, suggesting more customers were able to resolve their issues online. With more people taking care of their tasks online, Medicare officials can focus contact center resources on the more complex issues people have.

## Opportunities to Improve the Customer Experience

- **Customers can find it difficult to understand the various Medicare plan options and determine the best one for them.** Medicare has many different types of plans available, and CMS provides a tool to help people sort through the options. Based on customer research and testing, the agency launched an upgraded version of this tool in August 2019 that enables people to enter information about themselves (e.g., where they live, how frequently they travel) and receive tailored suggestions for Medicare plans to meet their needs.
- **People can struggle to understand technical health insurance language about their Medicare coverage.** CMS officials noted that the agency strives to make complex medical terms easy for customers to understand, and regularly assesses ways to improve online content through user testing and other research.
- **The Medicare online experience could be improved.** For example, Medicare's two primary websites—Medicare.gov, which offers general information, and MyMedicare.gov, which enables users to create accounts and access personalized information—can feel different to users and create confusion, according to CMS officials.

The agency is working to create a more consistent experience across these sites through its eMedicare initiative. As part of this work, CMS has rolled out several new online tools, including the “What’s Covered” mobile application, which gives customers information about what tests, items or services Medicare covers. The agency also launched a new “lookup tool” for checking the price of medical procedures to help patients compare payments and copayments for procedures at different hospitals enrolled in Medicare.

Our scan of more than 12,000 online posts about Medicare customer support services found examples of posts that can help understand the customer experience, such as people commenting on the complexity of Medicare billing statements and citing delays in receiving new Medicare cards. Here, we provide two examples of posts that reinforce themes in customer feedback identified elsewhere in the profile. Along with comments on other topics, our scan found instances of customers both praising and providing constructive feedback on online features, including the “What’s Covered” app and the plan finder tool.

For example:

**“Medicare.gov now has a great app I recommend that is named What’s Covered? to help you determine coverage under Medicare health plans? Download it today!”**

**“Have you tried to use the Medicare plan finder tool? It is very complicated! To improve elderly decision making, we need improved information, less complexity, greater transparency, better use of defaults & personal reminders.”**

*See page 10 for more information about our methodology.*

## Website Experience: How Easy Is It to Navigate and Understand Online Information?

In April 2019, the Partnership and Accenture partnered with the Center for Plain Language, a nonprofit organization that champions clear language, to conduct an analysis of selected CMS web pages. We analyzed selected Medicare.gov pages that provide information on getting drug coverage or filing a claim to see how easy they were to understand and navigate. Reviewers from the Center for Plain Language assessed the sites from the perspective of three different people: someone enrolling for coverage, someone already enrolled but looking to add coverage, and someone submitting a claim for durable medical equipment.

MEDICARE GRADE  
(APRIL 2019)

C

**Note:** In a separate study, the center examines a range of government websites annually, and its 2018 Federal Plain Language Report Card gave the sites reviewed an average grade of “C.”

See page 8 for more information on our methodology.

### What the Analysis Found

It can be difficult to find, understand or act on the information the CMS site provides. For example, a user seeking to file a Medicare claim would find a page explaining it is up to Medicare doctors and suppliers to file claims. What is missing is information on the exceptions, that is, when the beneficiary actually does need to file a claim, such as when a physician is not a Medicare provider. For that information, a website user must go halfway down the page and click to open a claim form. On that form, a third of the way down the first page, are details on when it is up to the beneficiary to file the claim.

Several pages related to getting drug coverage are heavy with text, use a lot of jargon and acronyms and, in some places, are overwhelmingly busy. The web pages lack pictures, graphics or charts to support the content.

The information is organized—to a point—and follows several plain-language principles, such as consistently calling the user “you,” rather than “Medicare beneficiary” or another similarly impersonal term. Yet the site could be more user-friendly. Experienced users, and users familiar with the Medicare system and plan options, probably could make their way to useful information, but people unfamiliar with the complex range of Medicare choices would likely find the site difficult to use.

#### 2 ways to get prescription drug coverage

1. Medicare Prescription Drug Plan (Part D) . These plans (sometimes called “PDPs”) add drug coverage to Original Medicare, some Medicare Cost Plans, some Medicare Private Fee-for-Service (PFFS) Plans, and Medicare Medical Savings Account (MSA) Plans.
2. Medicare Advantage Plan (Part C) (like an HMO or PPO) or other Medicare health plan that offers Medicare prescription drug coverage. You get all of your Medicare Part A (Hospital Insurance) and Medicare Part B (Medical Insurance) coverage, and prescription drug coverage (Part D), through these plans. Medicare Advantage Plans with prescription drug coverage are sometimes called “MA-PDs.” You must have Part A and Part B to join a Medicare Advantage Plan.

**Figure 1:** Pages are dense and use unnecessary acronyms.




## Indicators That Customer Experience Is a High Priority

The Partnership and Accenture developed the following list of indicators to understand how agencies are prioritizing the customer experience, and steps they can take to improve. The list is based on research about effective customer experience practices in both government and the private sector, and aligns with practices in a customer experience maturity self-assessment for agencies developed by the Office of Management and Budget. Leaders who participate in the Partnership's federal customer experience roundtable provided input.

See Appendix IV for more details on our methodology.





### Commitment to customer experience

The agency:

-  **Includes high-quality customer experience in its strategic goals.**  
*CMS does not publish a strategic plan, though it includes 16 strategic initiatives on its website, some of which address customer experience issues.*
-  **Specifies customer feedback as a key measure of the organization's performance.**  
*While CMS does not publish customer feedback on Medicare as one of the agency's overall performance measures, it does use customer feedback when measuring the performance of Medicare customer service programs.*
-  **Has a senior executive with the responsibility and authority to lead efforts to improve customer experience across the organization.**  
*CMS coordinates customer experience efforts across the agency through its Office of Communications, and the head of this office has customer experience as one responsibility.*
-  **Has a process for standardizing across channels the information and guidance provided to customers.**
-  **Shares meaningful customer feedback with the public.**  
*Possibly due to restrictions imposed by the Paperwork Reduction Act.*

### Customer service basics

For the most common services provided, customers can:

-  **Complete frequently used transactions online.**  
*Customers can go online to shop for and enroll in Medicare plans, and get information about the costs and services that are covered.*
-  **Easily find information to call an appropriate representative.**
-  **Schedule in-person appointments.**  
*Not applicable. Medicare does not have field offices.*
-  **Obtain status updates.**  
*People can get online information on the status of their Medicare enrollment, and can check personalized information, such as the status of claims on MyMedicare.gov.*

### Customer feedback

The agency collects and analyzes data and information on customer perceptions:

-  **Of specific interactions, including website visits, phone calls and in-person appointments.**
-  **Of the customer journey through a series of interactions or multistage processes.**
-  **Of the overall service the organization provides.**
-  **Through qualitative research, such as customer interviews, focus groups, analysis of social media comments or direct observation.**

 Yes  No  Partially

# Outpatient Health Care Services for Veterans



Veterans Health Administration, Department of Veterans Affairs

## Summary

The Department of Veterans Affairs has undertaken a concerted effort during the past several years to change its culture to better serve veterans in the largest integrated health care system in the United States. In the wake of highly publicized accounts of long wait times for care and difficulties locating information on websites, the department has placed increased emphasis on improving the customer experience for veterans.

In 2015, the VA established a central veterans experience office that has helped the Veterans Health Administration launch a major effort to improve its online and in-person customer experience. This office, in partnership with the VHA, has enhanced inpatient and outpatient services at the 1,200 facilities that serve more than 9 million veterans each year. Taking its efforts a step further, in 2019 the VA also incorporated customer experience principles into its core values and regulations, highlighting its priority to improve how veterans experience VA services.

During the past few years, the VA has cut wait times for appointments at its medical centers, consolidated hundreds of its websites into one and provided volunteers to help veterans find their way around medical facilities. And in 2016, the VHA began offering same-day access to emergency mental health care at all its medical centers.

Average wait times at VHA hospitals dropped by nearly five days during a three-year period, according to a 2019 study published in JAMA, an international peer-reviewed general medical journal, whose authors included current and former VA officials. In 2017, the average wait time to see a provider was 177 days, down from 22.5 days in 2014. That is 12 days shorter than wait times for appointments at private sector medical offices, which averaged 29.8 days in 2017, according to the study.

To improve the online experience, the department in 2018 merged hundreds of VA websites and redesigned its VA.gov website, basing the changes on extensive user testing and human-centered design. The redesigned websites provide clearer and more accessible information on a range of veterans' needs, including how to apply for VA health care, according to our review of selected web pages.

The focus on the customer experience likely contributed to an improvement in how veterans who went to a VA health care facility perceive the department. In September 2019, 88% of veterans said they "trust the VA for their health care needs" when responding to an outpatient health care survey, up from 85% two years earlier.

The department still has work to do on ensuring veterans can access care quickly, particularly specialty medical services provided by either the VHA or community providers outside the VA system, according to outpatient health care surveys.

Veterans may soon experience advances in access to care due to the VA Mission Act of 2018, which focuses on consolidating and streamlining how veterans receive care from community providers.

### DID YOU KNOW?

The VA has more outpatient facilities than CVS has Minute Clinics.

## Service Overview<sup>1</sup>

### Key Services

- Assistance with applying for VHA health care.
- Assistance with scheduling and viewing health care appointments.
- A wide-variety of health care services ranging from surgery and physical therapy to dental, mental health and vision care.
- Assistance with refilling and tracking prescriptions, and viewing lab and tests results.

### PRIMARY CUSTOMERS

Veterans and their families, caregivers and surviving spouses.

<sup>1</sup> Data provided by the Department of Veterans Affairs for fiscal 2018.

**CALLS****>41 million**

calls to VHA's outpatient services contact centers.

This includes calls to schedule appointments, for pharmacy services and for other needs.

**WAIT TIME****56 seconds**

average wait time to speak with a representative at outpatient services contact centers

**ONLINE VISITS****280.1 million**

visits to VA.gov

**FACE-TO-FACE CONTACTS****85.9 million**

outpatient visits

---

**Social Media Presence**

The VHA engages with veterans on Twitter, Facebook and YouTube. The agency collects and analyzes information and feedback from the veterans' social media posts, and combines it with information and feedback from other sources for insights on what is working well and how VHA can improve services. Additionally, the VHA analyzes social media posts to identify and offer help to veterans who may be in crisis.

As of September 2019, the agency's social media presence includes:

**TWITTER****@VeteransHealth**


---

Joined: November 2008

Followers:

**106K**

Tweets:

**29.5K****FACEBOOK****@VeteransHealth**


---

Joined: October 2008

Followers:

**250K**

Likes:

**252K****YOUTUBE****Veterans Health Administration**


---

Joined: March 2008

Subscribers:

**28.3K**

Views:

**27M**



## Customer Feedback<sup>2</sup>

The VHA collects customer feedback from many interactions with veterans. The results below are based on surveys about outpatient health care services as well as mail and in-person pharmacy services. Some survey categories had multiple questions. The results represent an aggregate percentage for that category, calculated by the Department of Veterans Affairs.<sup>3</sup>

### KEY TAKEAWAY

Veterans rated most aspects of their outpatient health care experience highly, and were often particularly pleased with their interactions with VA health care providers.

	QUARTER 1	QUARTER 2
<b>Trust in VA Facilities</b> <i>I trust &lt;FacilityName&gt; to fulfill our country's commitment to Veterans.</i>	87.6%	87.6%
<b>Satisfaction</b> <i>I am satisfied with the service I received from [Facility Name].</i>	N/A	93.1%
<b>Service Effectiveness</b> <i>I got my appointment on a date and time that worked for me.</i> <i>After I checked in for my appointment, I knew what to expect.</i> <i>I felt comfortable requesting my mail-order prescription(s).</i> <i>My prescription(s) arrived at my preferred address.</i>	91.8%	92.4%
<b>Ease of Process</b> <i>It was easy to get my appointment.</i> <i>After I entered &lt;FacilityName&gt;, I found it easy getting to my appointment.</i> <i>After my visit, I knew what I needed to do next.</i> <i>It was easy to get my prescriptions filled at &lt;DivisionName&gt; Pharmacy.</i> <i>It was easy to request my mail-order prescription(s).</i> <i>I knew when to expect my prescription(s).</i> <i>It was easy to find the location for my lab tests or imaging.</i>	90.8%	91.2%
<b>Efficiency of Process</b> <i>My wait time was reasonable.</i> <i>My lab tests or imaging were completed within a reasonable time frame.</i>	89.7%	89.8%
<b>Transparency of Process</b> <i>When scheduling my appointment, I was treated with courtesy and respect.</i> <i>When I picked up my prescription(s), I was treated with courtesy and respect.</i> <i>When I got my lab tests (blood draw, etc.) or imaging (X-ray, MRI, CT scan) done, I was treated with courtesy and respect.</i>	94.2%	94.4%
<b>People and Employees</b> <i>My provider listened carefully to me.</i> <i>My provider explained things in a way that I could understand.</i>	94.2%	94.5%

<sup>2</sup> Data is from fiscal 2019 quarter 1 and quarter 2.

<sup>3</sup> Data is from a follow-up survey offered to customers upon receiving outpatient services in the first and second quarters of fiscal year 2019. Surveys are sent via email and offered online through both desktop and mobile devices. Response rate: 30.5%; Survey scale: five-point Likert scale ranging from "strongly disagree" to "strongly agree." The percentages for each category represent the aggregated percentage of customers who responded "agree" and "strongly agree" to the questions listed below each category.

## Customer Experience Highlights

- **VA staff who provide outpatient health care services treat veterans with courtesy and respect,** according to most veterans who responded to the survey. “I have been and continue to receive excellent care and courtesy from the staff and medical personnel at the clinic,” wrote one respondent about the experience with VA’s lab tests and imaging services. The comment was representative of a larger trend in the health care appointment survey responses. When VA patients feel they are consistently cared for and treated with respect, it builds trust and confidence in the VHA and the services it provides.

The VA trains employees to take responsibility for the experience veterans have when they receive VHA services, setting behavioral standards and expectations. For example, providers are encouraged to sit down when they meet with patients so people do not feel they are being rushed out of the office.

Our scan of nearly 2,000 social media comments about VHA services found many examples of posts that can help understand the customer experience. Here, we provide two examples of posts that reinforce themes in customer feedback identified in this profile. Along with other topics, our scan found many instances of customers praising services delivered at VHA facilities and commending online tools, such as those that let veterans and their health care providers send secure messages back and forth.

For example:

**“I’ve always got the best service and medical treatment at the San Diego VA facilities.”**

**“I used the @VeteransHealth #myHealtheVet secure messaging yesterday to ask a question of my @VANewOrleans #physician. He called me at 8:13am today. @DeptVetAffairs #EHR, I #ChooseVA. The new tools are expanding and improving, use them for great customer service.”**

*See page 10 for more information about our methodology.*

- **Veterans’ satisfaction with the VA’s website increased.** In November 2018, the department completed the redesign of its website around the needs of veterans using principles of human-centered design. The redesign entailed consolidating hundreds of separate VA websites into a simplified front door. Rather than loading the new site with information about the VA as an organization, it is centered around the top 20 tasks veterans come to the site to complete, based on user research. Veterans’ satisfaction with the website rose dramatically after the redesign, according to VA officials.
- **Navigating VHA facilities has become easier,** thanks to the VA’s Red Coat Ambassadors program, according to department officials. The VA learned many veterans found it stressful and frustrating to navigate VHA facilities and took steps to address the issue. The department now coordinates a program that places volunteers in VHA facilities. They wear easily recognizable red coats and are there to greet customers, guide them through the facility and provide information about services and programs, according to Barbara Morton, deputy chief at the Veterans Experience Office.
- **Veterans can get same-day access to emergency mental health care** at any VA medical center across the country, whether through an in-person appointment or through a telephone call. In fiscal 2018, 1.7 million veterans received mental health services through the VA, according to a VA press release. For veterans who do not take advantage of same-day mental health services, more than 90% are able to secure an appointment within 30 days.

## Opportunities to Improve the Customer Experience

- **Veterans would like to schedule appointments with non-VA community providers more quickly.** Eligible veterans can seek care at community providers outside of the VA system, but they often waited up to two months to receive such care, according to a 2018 GAO report.

The VA is addressing this issue through implementation of the 2018 VA Mission Act, which consolidates and streamlines the different programs veterans use to access community care. For example, the bill gives eligible veterans increased access to private clinics, allowing them to be walk-in patients, rather than requiring them to schedule an appointment.

- **Veterans would like it to be easier to schedule appointments for specialty services** such as dental care. “I was very disappointed with how long it took me to schedule my dental appointment. I had to make several phone call[s] to the call center and wait for dental to return my call ... ” wrote one survey respondent, which was representative of a broader trend in the health care appointments survey responses. The VHA is using several strategies to address this issue, such as modernizing the technology veterans use to make appointments, offering virtual “telehealth” services when appropriate, and providing increased access to care outside of the VHA when necessary, as required by the VA Mission Act.

## PROMISING PRACTICE: TURNING CUSTOMER EXPERIENCE DATA INTO ACTION

In the past five years, the Department of Veteran Affairs has emerged as a government leader in collecting and analyzing end-to-end customer experience data and information, and using the results to develop tools, initiatives and training to improve service to veterans.

When VA leaders set out to better understand veterans' experiences, they realized that although they were collecting and analyzing a lot of data, much of it was what the VA leaders thought was important. They needed to figure out if they were measuring what mattered most to veterans.

The Veterans Experience Office launched an extensive qualitative customer research effort that involved interviewing veterans in their homes and observing firsthand their interactions with VA services. This research effort identified what was most important to veterans, including being able to schedule appointments in a reasonable amount of time and navigate a VA facility. The department focused subsequent research on understanding how well it was doing in these areas. "The surveys are less about us and more about how we deliver services to veterans," said Tom Pasakarnis, a policy analyst in the VA's Veterans Experience Office.

To get a full picture of veterans' experiences, the VA supplemented the results of surveys and interviews with other information including, for example, comments veterans posted on social media or offered via digital comment cards after visits to VA facilities or the website. All this information goes into a single database that can generate real-time insights.

The VA's Veterans Experience Office used customer feedback from this database to train employees and create programs such as the Red Coat Ambassador program mentioned previously. The office also created an "Own the Moment" training session that instills a proactive customer service mindset and empowers employees to act if they see something that is creating a poor experience for veterans.

This data and feedback help the office to identify VA facilities that are providing a high-quality customer experience in particular areas, and replicate those practices across the VA.

## Website Experience: How Easy Is It to Navigate and Understand Online Information?

In April 2019, the Partnership and Accenture partnered with the Center for Plain Language, a nonprofit organization that champions clear language, to conduct an analysis of selected VA web pages that provide information on applying for VA health care. Reviewers looked at the pages from the perspective of a veteran looking into benefits for dental and mental health.

**Note:** In a separate study, the center examines a range of government websites annually, and its 2018 Federal Plain Language Report Card gave the sites reviewed an average grade of "C."

See page 8 for more information on our methodology.

VA GRADE  
(APRIL 2019)

A

## What the Analysis Found

The web pages are clear and well-focused on the task of applying for VA health care benefits. The content is concise and provides the information needed to complete the task. It anticipates potential questions about the health care application process, such as next steps after applying and the length of time it could take for the VA to make a decision, and provides a phone number for questions about application status. The pages use plain language and a simple, spare design that conveys the process will be simple and straightforward. For veterans in crisis, there is a prominently displayed red alert bar notifying users that a Veterans Crisis Line is available 24 hours a day.



Figure 1: Crisis link is prominently displayed.

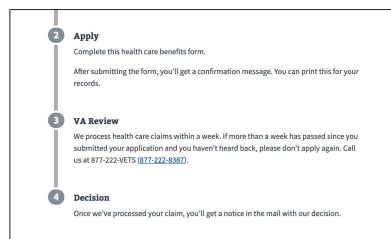


Figure 2: Process bar guides users who are applying for benefits.

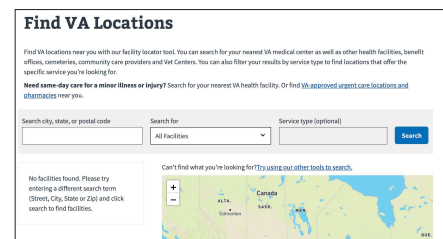


Figure 3: Interactive map to find VA locations.

## Indicators That Customer Experience Is a High Priority

The Partnership and Accenture developed the following list of indicators to understand how agencies are prioritizing the customer experience, and steps they can take to improve. The list is based on research about effective customer experience practices in both government and the private sector, and aligns with practices in a customer experience maturity self-assessment for agencies developed by the Office of Management and Budget. Leaders who participate in the Partnership's federal customer experience roundtable provided input.

See Appendix IV for more details on our methodology.

### Commitment to customer experience

The agency:

- ✓ **Includes high-quality customer experience in its strategic goals.**
- ✓ **Specifies customer feedback as a key measure of the organization's performance.**  
*The percent of veterans who agree with the statement, "I trust VA to fulfill our country's commitment to Veterans," is a key performance measure.*
- ✓ **Has a senior executive with the responsibility and authority to lead efforts to improve customer experience across the organization.**
- ~ **Has a process for standardizing across channels the information and guidance provided to customers.**  
*The VA is working to develop knowledge management systems to help standardize information and guidance across channels.*
- ✓ **Shares meaningful customer feedback with the public.**

### Customer service basics

For the most common services provided, customers can:

- ✓ **Complete frequently used transactions online.**  
*Veterans can apply for care, schedule an appointment, view lab and test results, and manage prescriptions online.*
- ~ **Easily find information to call an appropriate representative.**  
*The VA's health care website provides four different contact numbers with a limited description of which issues can be resolved by each.*
- ✓ **Schedule in-person appointments.**
- ✓ **Obtain status updates.**  
*Veterans can track the status of a health care claim or appeal online.*

### Customer feedback

The agency collects and analyzes data and information on customer perceptions:

- ✓ **Of specific interactions, including website visits, phone calls and in-person appointments.**
- ✓ **Of the customer journey through a series of interactions or multistage processes.**
- ✓ **Of the overall service the organization provides.**
- ✓ **Through qualitative research, such as customer interviews, focus groups, analysis of social media comments or direct observation.**

✓ Yes    ✗ No    ~ Partially

# Passport Services

Bureau of Consular Affairs  
Department of State



*This profile focuses exclusively on passport services to include the experiences of people who call the National Passport Information Center, get information from the [travel.state.gov](https://travel.state.gov) website and visit local passport offices. It does not address other services provided by the Bureau of Consular Affairs, such as support to U.S. citizens overseas.*

## Summary

The State Department's Bureau of Consular Affairs issues passports to Americans and visas to foreign visitors to the U.S., providing critical services to facilitate international travel and ensuring the integrity of the passport system.

In fiscal 2018, the bureau issued more than 21 million passports—about 5 million more than a decade earlier. Even with the substantial increase in demand, people reported high satisfaction with the services and support they received, according to bureau surveys. They highlighted the professionalism and knowledge of staff, both at passport offices they visited and contact centers they called.

In addition, web pages that offer information on applying for passports are easy to navigate and offer helpful explanations of the process, according to our review.

However, increased demand for passports and staffing shortages over the past two years have led to increased processing times for routine passport applications, which averaged about 16 days in August 2019, one of the highest average processing times in years. Additionally, the consular affairs bureau lacks online, self-service options for renewing or applying for a passport, although it hopes to launch an online renewal option in late 2020.

Since passport processing is funded by applicant fees, it was not affected by the partial government shutdown that began in December 2018, unlike other State Department activities.

### DID YOU KNOW?

About 42% of the U.S. population, or 137 million citizens, have valid U.S. passports.

## Service Overview<sup>1</sup>

### Key Services for the Bureau of Consular Affairs

- Information on and assistance with applying for, renewing and canceling passports.
- Processing of passport applications, renewals and cancellations, and passport issuance.
- Expedited passports for emergency travel.

### PRIMARY CUSTOMERS

Citizens applying for or holding U.S. passports.

<sup>1</sup> Data provided by the Bureau of Consular Affairs for fiscal year 2018.

**CALLS****4.3 million**calls to passport services  
contact centers**WAIT TIME****<1 minute**average time to speak with  
a representative**ONLINE VISITS****69.5 million**visits to  
[travel.state.gov/passport](https://travel.state.gov/passport)**FACE-TO-FACE CONTACTS****931,000**visits at local passport  
agencies and centers

---

**Social Media Presence**

The Bureau of Consular Affairs has more than a million followers across Twitter, Facebook and Instagram. The bureau primarily uses its platforms to share information critical for U.S. citizens traveling abroad, such as how to apply for a U.S. passport and international safety and security information. It hosts sessions on platforms such as Facebook to answer questions and provide tips about applying for passports. The bureau also uses its social media platforms to reach foreign nationals applying for visas to travel to the United States. It regularly assesses the performance of its social media content and efforts to inform future outreach strategies.

Additionally, all passport agencies and centers have a presence on Yelp and use the site to analyze customer feedback and respond to questions and concerns.

As of September 2019, the bureau's social media presence includes:

**TWITTER****@TravelGov**

Joined: July 2008

Followers:

**574K**

Tweets:

**20.1K****FACEBOOK****@travelgov**

Joined: February 2008

Followers:

**477K**

Likes:

**456K****INSTAGRAM****@travelgov**

Joined: February 2015

Followers:

**6.5K**

Posts:

**147****YELP****Passport Agencies**

Joined: June 2016

Reviews of passport  
agencies and centers in  
the last 12 months:**3K**

Average star rating:

**4.5 out of 5**



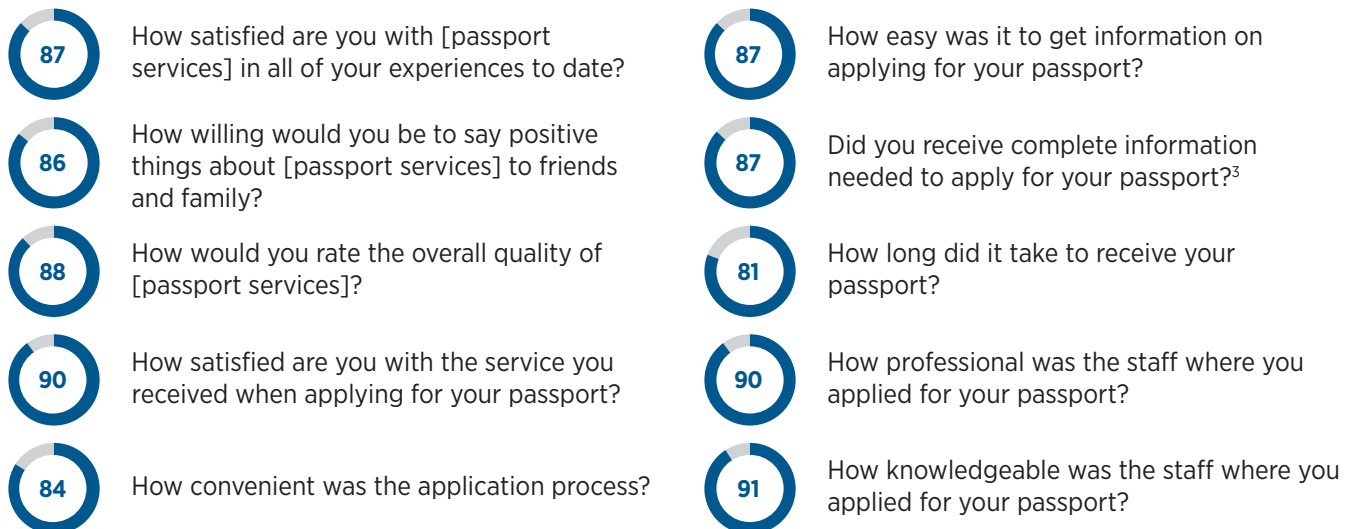
## Customer Feedback

The Bureau of Consular Affairs collects customer feedback on passport services from its contact center, website and other channels it uses to interact with the public. Although each of the surveys conducted by the bureau and highlighted below received more than 1,000 responses, low response rates—of 6% and less—may affect the reliability of the data.

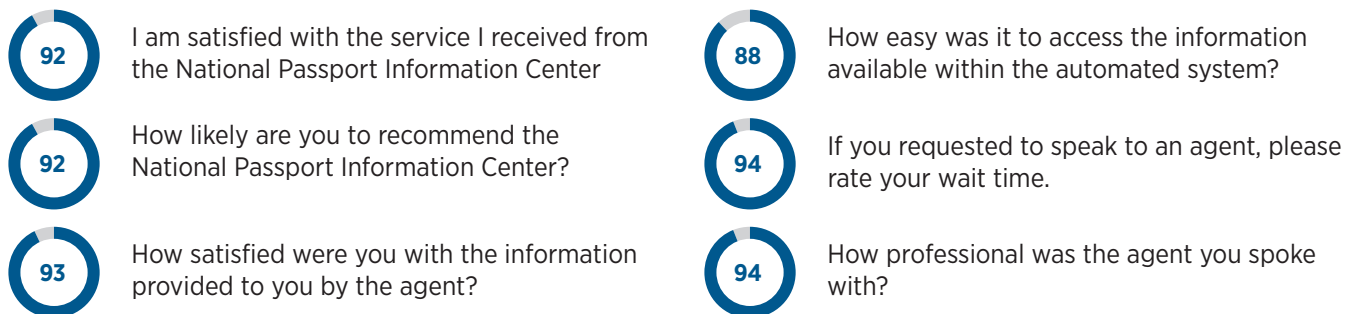
### KEY TAKEAWAY

Most people are satisfied overall with their experiences applying for a passport, receiving help from the passport services contact center and getting information online.

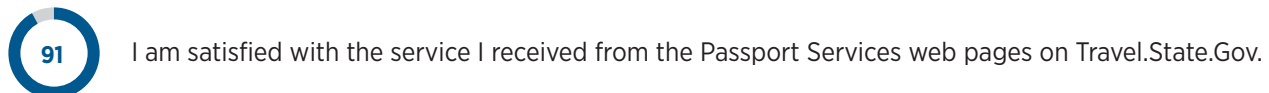
### Passport Services Application Process Survey Fiscal 2019 Q1<sup>2</sup>



### Passport Services Contact Center Survey Fiscal 2019 Q1<sup>4</sup>



### Passport Services Website Survey Fiscal 2019 Q1<sup>5</sup>



2 Data is from a survey emailed to customers after they have applied for or renewed a passport. Response rate: 6.07%; Survey scale: 1-10-point scale, unless noted otherwise. The responses for each question are used to calculate a score between 0-100.

3 Question uses a Yes/No scale.

4 Data is from a postcall survey administered through IVR after customers interact with Passport Services' contact center. Response rate: 3%; Survey scale: 1-9-point scale. The responses for each question are used to calculate a score between 0-100.

5 Data is from a follow-up survey offered to customers upon interacting with web pages on the travel.state.gov website. Response rate: 0.25%; Survey scale: seven-point Likert scale ranging from "extremely dissatisfied" to "extremely satisfied." The percentage for the question represents the percentage of customers who responded "extremely satisfied", "moderately satisfied", or "slightly satisfied."

## Customer Experience Achievements

- **People value the knowledge and professionalism of passport services staff,** according to the bureau's customer surveys. Staff at both contact centers and local passport offices receive extensive training to resolve customer issues, and the organization celebrates examples of excellent service through awards and newsletters. The bureau also works to ensure staff members have consistent website and contact center information to support customers. This ensures people get the same guidance no matter how they get their information.
- **Passports can be issued quickly for emergency travel.** Customers appreciate the expedited service, even though there is an additional fee, according to bureau officials. People who have an urgent need to travel internationally can make an appointment at a local passport office, and their application typically gets processed within two or three days. Routine processing typically takes six to eight weeks.

The bureau is considering an automatic reminder system to alert people when their passports are about to expire. Building such a new capability could reduce the need for expedited renewals.

Our scan of more than 7,000 social media comments about passport services found many examples of posts that can help understand the customer experience, such as people noting inaccuracies when checking the delivery status of their passport online and expressing confusion about the process for renewing passports. Here, we provide one example of a post that reinforces a theme in customer feedback identified in this profile. Along with other topics, our scan found many instances of customers seeking help when they have a pressing need for a passport.

For example:

**"Hello Sir/Madam,**

**My daughters passport expired, i gave it for renewal 3 days back, my father passed away today. we need to travel on 1/28/2019, please let us know what needs to be done, Our departure is 4pm on 1/28/2019**

**Thanks for understanding"**

*See page 10 for more information about our methodology.*

## Opportunities to Improve the Customer Experience

- **Customers cannot apply for or renew a passport online** due to constraints with the department's technology. Bureau officials said they hope to roll out online passport renewal in late 2020 and also make it possible eventually for individuals to apply online for their first passport.
- **People may have inconsistent experiences at independent facilities that provide passport services,** such as post offices and libraries. Many people complete and submit passport applications at one of approximately 8,000 "acceptance facilities," which are authorized by the State Department but are not under its direct control. The bureau develops training materials and conducts inspections of these facilities to promote high levels of service, but it has limited insights into what customers experience there.
- **Passport application processing times are rising** due to an increased number of applications and a reduced number of passport specialists. It took the bureau 16 days on average to process routine passport applications in August 2018, among the highest average processing times in more than a decade.<sup>6</sup> These processing times do not include the time the documents are in the mail or at a contract facility where the information is catalogued.

Bureau officials helped the situation by setting clear expectations for customers about how long it was going to take to receive their passports. Customers were informed in 2019 that the standard wait time would be from six to eight weeks, whereas in previous years they had been told four to six weeks.

6 Government Executive, "Passport Processing at State Slows as Staffing Levels Fall," August 13, 2019. Retrieved from <http://bit.ly/33u7aCJ>

**PROMISING PRACTICE****IMPROVING SECURITY BY MAKING IT EASIER FOR CUSTOMERS TO REPORT LOST OR STOLEN PASSPORTS**

Criminals buy or pilfer passports to steal identities, and terrorists, as well as others who intend to cause harm or escape detection, use stolen passports to cross borders, so it is vital for citizens to immediately report a lost or stolen passport. Before 2015, however, there was no online option for doing so. Citizens could report lost or stolen passports only over the phone, through the mail or by appearing in person.

Officials at the Bureau of Consular Affairs were concerned the inconvenience of those methods was keeping citizens from reporting missing passports. So in 2015, the bureau offered an online tool to make it easier and more convenient for people to file a report. Once it became available, the bureau experienced an immediate spike of more than 1,000 additional reports each week. Over the next two years, the bureau experienced a 46% increase in the number of missing or stolen passports reported from around the world.

This initiative not only enabled passport services to strengthen national security but also improved the experience for passport customers. For example, people submitting a report online generally get confirmation within 48 hours as opposed to waiting several weeks for a mailed confirmation.

## Website Experience: How Easy Is It to Navigate and Understand Online Information?

We partnered with the Center for Plain Language to conduct an analysis of how easy it is for customers to navigate and understand a Bureau of Consular Affairs website that provides information on obtaining a passport. Reviewers looked at the site for the perspective of a potential user: a citizen applying for a passport for the first time.

**Note:** The center examines a range of government websites and issues an annual Federal Plain Language Report Card. The average grade in 2018 was a “C.”

See page 8 for more information on our methodology.

**PASSPORT SERVICES  
GRADE (APRIL 2019)**

**A-**

### Summary of Results

The site offers clear directions to users who need different types of services, such as renewing a passport or obtaining a new passport for a child. It uses plain language and offers features that help users get what they need quickly and easily, such as simple navigation bars, step lists, engaging graphics and useful charts and videos. The site has a few pages with dense text but is mostly uncluttered.

Answer a few questions and we'll direct you to your U.S. passport form.

Step 2 of 3

**Estimate Your Cost**

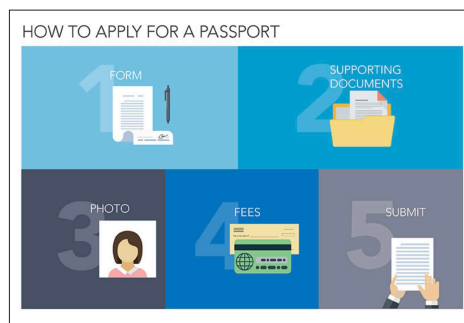
To calculate the total cost of your new passport, select the passport type(s) and the method of processing you would like to use. Please note, the application cost is non-refundable and is retained by the Department of State whether or not the passport is issued. You cannot pay online for passport services at this time.

Passport Type: **Book**

Processing Method: **Expedited**

Passport Book	\$80.00
Expedited Processing	\$60.00
1-2 Day Delivery	\$16.48
<b>Total Payable to Department of State</b>	<b>\$156.48</b>

**Figure 1:** An interactive tool that answers key user questions.



**Figure 2:** The overview page would be more helpful if users could click on the blocks they see.






## Indicators That Customer Experience Is a High Priority

The Partnership and Accenture developed the following list of indicators to understand how agencies are prioritizing customer experience, and the steps they can take to improve. The list is based on research about effective customer experience practices in both the government and the private sector, and aligns with practices in a customer experience maturity self-assessment for agencies developed by the Office of Management and Budget. Leaders who participate in the Partnership's federal customer experience roundtable provided input.

See Appendix IV for more details on our methodology.





### Commitment to customer experience

The bureau:

-  **Includes high-quality customer experience in its strategic goals.**  
*However, customer experience is included as a focus area in the bureau's goals around innovation and modernization.*
-  **Specifies customer feedback as a key measure of the organization's performance.**  
*The bureau has a key performance measure based on the timeliness of passport processing, but does not include customer feedback.*
-  **Has a senior executive with the responsibility and authority to lead efforts to improve customer experience across the organization.**  
*The deputy assistant secretary of state for passport services oversees all aspects of passport delivery, and improving customer experience is a part of that role.*
-  **Has a process for standardizing across channels the information and guidance provided to customers.**  
*Changes to the website and contact center knowledge base are done on an ad hoc basis through coordination with the content managers.*
-  **Shares meaningful customer feedback with the public.**


### Customer service basics

For the most common services provided, customers can:

-  **Complete frequently used transactions online.**  
*People can access passport applications online but cannot submit the complete application electronically.*
-  **Easily find information to call an appropriate representative.**
-  **Schedule in-person appointments.**  
*Customers can schedule appointments online to visit passport agencies.*
-  **Obtain status updates.**  
*People can track the status of passport applications online.*

### Customer feedback

The bureau collects and analyzes data and information on customer perceptions:

-  **Of specific interactions, including website visits, phone calls and in-person appointments.**
-  **Of the customer journey through a series of interactions or multistage processes.**
-  **Of the overall service the organization provides.**
-  **Through qualitative research, such as customer interviews, focus groups, analysis of social media comments or direct observation.**

 Yes  No  Partially



# Appendix I: Acknowledgments

---

The individuals listed below generously offered their input on this report. We greatly appreciate their time and counsel. However, the contents of this report do not necessarily reflect the views of those we interviewed. Additionally, the views of participating federal officials do not necessarily reflect positions or policies of the federal government or its agencies.

## Department of Education

### Federal Student Aid

Abraham Mariñez, Chief of Staff,  
Customer Experience Office

Chris Greene, Chief Customer Experience Officer

Ed Pacchetti, Director of Customer Analytics

Jennifer Douglas, Deputy Chief Customer Experience  
Officer

## Department of Homeland Security

### Customs and Border Protection

Jeremy Wendte, Branch Chief of the Traveler  
Communications Center

John Wagner, Deputy Executive Assistant Commissioner,  
Office of Field Operations

William Begenyi, Strategic Transformation Office, Office  
of Field Operations

### Office of the Citizenship and Immigration Services Ombudsman

Allison Posner, Chief of Casework

### Transportation Security Administration

Michelle Cartagena, Director, Traveler Engagement  
Division, Office of Civil Rights and Liberties, Ombudsman,  
and Traveler Engagement

Nicole French, Acting Customer Service Branch Manager,  
Office of Civil Rights and Liberties, Ombudsman, and  
Traveler Engagement

### U.S. Citizenship and Immigration Services

Mary Herrmann, Acting Chief, Public Services Division

Vashon Citizen, Chief, Contact Center Solutions, Public  
Services Division

## Department of State

### Bureau of Consular Affairs

Carl Siegmund, Program Analyst, Community  
Relations Division

Dan Alessandrini, Director, Office of Program  
Management and Operational Support

Nancy Pace, Chief, Customer Service Division

## Department of Treasury

### Internal Revenue Service

Cindy Jones, Chief, Program Management Office, Wage  
and Investment

Dietra Grant, Director, Customer Assistance, Relationships  
and Education

John Hannas, Project Manager, Customer Experience,  
Cross Agency Priority Goal 4

Jim Clifford, Director, Customer Account Services, Wage  
and Investment

## Department of Veterans Affairs

Barbara Morton, Deputy Chief, Veterans Experience Office

Lee Becker, Chief of Staff, Veterans Experience Office

Thomas Pasakarnis, Policy Analyst, Veterans  
Experience Office

### Singer Immigration Law

Eric H. Singer, Principal

### Patient Advocate Foundation

Erin Bradshaw, Chief of Mission Delivery

### Maryland Higher Education Commission

Benée' Edwards, Grants Management Manager



# Appendix II: Project Team

---

## Partnership for Public Service

Samantha Donaldson, Vice President, Communications;  
Acting Vice President, Research, Analysis and Evaluation

Eric Keller, Senior Manager

Tim Markatos, Associate Design Manager

Meroe Park, Executive Vice President

Ellen Perlman, Senior Writer and Editor

Audrey Pfund, Senior Design and Web Manager

Emma Rhodes, Intern

Taylor Shotwell, Intern

Max Stier, President and CEO

Rachel Whitaker, Intern

Cassie Winters, Associate Manager

## Accenture Federal Services

Kathy Conrad, Director of Digital Government

Dave Nation, Service Transformation Lead

Christopher Zinner, Managing Director, Digital &  
Customer Experience

# Appendix III: High-Impact Service Providers as Identified by the Office of Management and Budget

---

## Department of Agriculture

U.S. Forest Service  
Farm Service Agency  
Natural Resources Conservation Service

## Department of Commerce

U.S. Patent and Trademark Office (Trademarks)  
U.S. Patent and Trademark Office (Patents)

## Department of Education

Federal Student Aid

## Department of Health & Human Services

Centers for Medicare and Medicaid Services (Health Insurance Marketplace)  
Centers for Medicare and Medicaid Services (Medicare)

## Department of Homeland Security

Transportation Security Administration  
U.S. Customs and Border Protection  
Citizenship and Immigration Services  
Federal Emergency Management Agency

## Department of Housing and Urban Development

FHA Single Family Loans and Resources Center

## Department of Interior

Trust Beneficiary Call Center, Office of the Special Trustee for American Indians  
U.S. Fish and Wildlife Service

## Department of Labor

Occupational Safety and Health Administration  
Office of Workers' Compensation Programs

## Department of State

Bureau of Consular Affairs

## Department of Treasury

Internal Revenue Service

## Department of Veterans Affairs

Veterans Health Administration  
Veterans Benefits Administration

## Office of Personnel Management

Federal Employment Services  
Retirement Services

## Social Security Administration

## Small Business Administration

Field Operations

## Interagency Initiative

Recreation.gov (U.S. Forest Service, National Park Service, U.S. Fish and Wildlife Service, Bureau of Land Management, Bureau of Reclamation, U.S. Army Corps of Engineers, National Archives)

# Appendix IV: Detailed Methodology for Our Review of Indicators That Customer Experience Is a High Priority

---

We reviewed each agency and service against indicators that customer experience is a high priority using the following criteria.

## Commitment to customer experience

The agency, subagency or bureau:

1. Includes high-quality customer experience in its strategic goals.

**Criteria:** 1) Customer experience with the agency's services is listed in the strategic plan as one of the organization's top priorities, or a supporting goal of one of the priorities; 2) the strategic plan provides specific actions the agency will take to improve customer experience.

2. Specifies customer feedback as a key measure of the organization's performance.

**Criteria:** There is a performance measure included in the agency's strategic plan, annual performance report or on performance.gov that is based on feedback directly from customers.

3. Has a senior executive with the responsibility and authority to lead customer experience efforts.

**Criteria:** Based on a review of the agency organizational chart and online descriptions of leadership positions, the agency has an executive who meets the following criteria: 1) customer experience is their primary responsibility; 2) they report to the head of their organization, or a deputy; 3) their work spans all major service delivery channels (e.g., online services, contact centers, face-to-face services).

4. Has a process for standardizing across channels the information and guidance provided to customers.

**Criteria:** At least two service delivery channels have integrated knowledge management systems so that when content for customers on one channel is updated, it is updated on the other channel.

5. Shares meaningful customer feedback with the public.

**Criteria:** In alignment with the Office of Management and Budget's guidance on CX measurement, the agency makes public customer feedback that: 1) represents multiple service delivery channels; 2) provides details into different aspects of the experience (e.g., beyond overall customer satisfaction).

## Customer service basics

For the most common services provided, customers can:

1. Complete frequently used transactions online.

**Criteria:** Based on a review of the agency's website, customers can complete all major services or transactions online.

---

2. Easily find information to call an appropriate representative.

**Criteria:** The agency's website provides a clear explanation of which number to call for specific issues or provides one number that customers can call to get routed to the appropriate person.

3. Schedule in-person appointments.

**Criteria:** Based on a review of the agency's website, customers have the ability to schedule appointments for in-person services.

4. Obtain status updates.

**Criteria:** Customers can get real-time updates through an online or self-service channel.

### **Customer feedback**

The agency, subagency or bureau collects and analyzes data and information on customer perceptions:

1. Of specific interactions, including website visits, phone calls and in-person appointments.
2. Of the customer journey through a series of interactions or multistage processes that build toward a specific goal.
3. Of the overall service the organization provides.
4. Through qualitative research, such as customer interviews, focus groups, analyzing comments on social media, or direct observation.









**PARTNERSHIP  
FOR PUBLIC SERVICE**

1100 New York Avenue NW  
Suite 200 East  
Washington DC 20005

(202) 775-9111  
[ourpublicservice.org](http://ourpublicservice.org)  
CFC# 12110

 [partnershipforpublicservice](https://www.facebook.com/partnershipforpublicservice)


 [@RPublicService](https://twitter.com/RPublicService)

 [rpublicservice](https://www.instagram.com/rpublicservice)



800 North Glebe Road  
Suite 300  
Arlington VA 22203

(877) 889-9009  
[accenture.com/federal](http://accenture.com/federal)

 [accenture](https://www.facebook.com/accenture)

 [@AccentureFed](https://twitter.com/AccentureFed)

 [accenture](https://www.instagram.com/accenture)