

CY 2025 OPERATIONAL KEY PERFORMANCE INDICATORS (KPIs)

ANNEX A

KPI	TARGET	FORMULA	KPI Weight	Applicable KPI Weight for Implementing Offices			Monitoring Office
				RRs	RDOs	LTS	
1 Collection Performance	100% collection of assigned goal	$\frac{\text{Actual Collections}}{\text{Assigned Goal}} \times 100$	50.00	50.00	50.00	50.00	Collection Service (CS)
2 Percentage Increase in Collection	10% increase from previous year's collection	$\frac{(\text{Actual collection} - \text{Previous year's collection})}{\text{Previous year's collection}} \times 100$	5.00	5.00	5.00	5.00	CS
3 Reduction of Tax Arrears	4% of the total number of cases handled are closed thru full payment including penalties and/or with partial payments and cancelled thru Authority to Cancel Assessment ATCA	$\frac{A}{B + C + D - E} \times 100$ <p>Where: A - AR/DA Cases Closed and/or Cancelled thru ATCA for the Current Year B - Total Number of Cases as Outstanding Balance of the Previous Year C - Total Number of Cases of New Accounts Created for the Current Year D - Total Number of Cases Transferred-in from other Service/Region for the Current Year E - Total Number of Cases Transferred-out to other Service/Region for the Current Year</p>	2.00	2.00	N/A	2.00	CS
Collection	4% of the total amount of accounts handled are collected either in full or partial	$\frac{A}{B + C + D - E - F} \times 100$ <p>Where: A - Total Amount of Arrears Collected for the Current Year B - Total Net Amount of Outstanding Balance of the Previous Year C - Total Amount of New Accounts Created for the Current Year D - Total Net Amount of Transferred-in from other Service/Region for the Current Year E - Total Net Amount of Transferred-out to other Service/Region for the Current Year F - Total Net Amount of Approved Cannot be Located Taxpayer for the Current Year</p>	3.00	3.00	N/A	3.00	

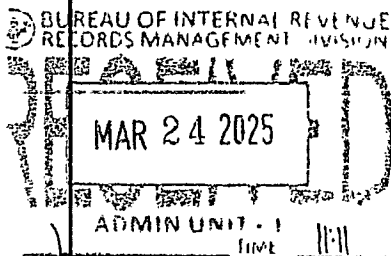
~~BUREAU OF INTERNAL REVENUE~~
~~RECORDS MANAGEMENT DIVISION~~

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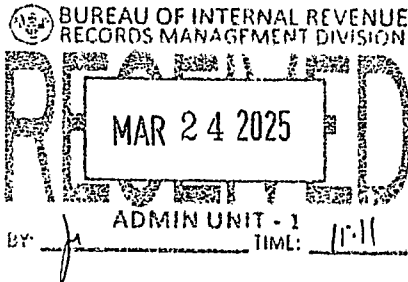
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4 Batch Control Sheet (BCS) Validation/Return Retrieval Efficiency	100% of Authorized Agent Bank (AAB) - Unuploaded BCS validated by RDO	<u>BCS Validation</u> $\frac{\text{Number of Uploaded/Resolved BCS previously rejected}}{\text{Total Number of Rejected BCS for resolution during the period}} \times 100$	2.00	2.00	2.00	N/A	CS
	100% of BCS retrieved by RDO from the AAB are transmitted to DPD	<u>BCS Return Retrieval</u> $\frac{\text{Number of BCS Retrieved by RDO}}{\text{Number of Uploaded and Rejected BCS}} \times 100$	3.00	3.00	3.00	N/A	
	100% of BCS transmission to DPD	<u>BCS Transmission to DPD</u> $\frac{\text{Number of BCS Received by DPD}}{\text{Number of BCS for Transmission by RDO}} \times 100$	2.00	2.00	2.00	N/A	
5 Increase in number of active registered business taxpayers	3% increase in the number of active registered business taxpayers	$\frac{\text{Total No. of Active Registered Business Taxpayers at the End of the Semester or Calendar Year} - \text{Total No. of Active Registered Business Taxpayers at the End of the Previous Calendar Year}}{\text{Total Number of Active Registered Business Taxpayers at the End of the Previous Calendar Year}} \times 100$ <p>Note: The source data for the number of active registered business taxpayers is from the TAS report No. 007 being submitted by the RDOs to TSPMD, if submitted on the prescribed deadline. The total number is net of business taxpayers whose TIN status has been deregistered, business taxpayers who have been transferred out to other RDO, and inactive business taxpayers successfully tagged in the registration system.</p>	2.00	N/A	2.00	N/A	Client Support Service (CSS)
6 Validation of Inactive Business Taxpayers	5% of inactive business taxpayers validated	$\frac{\text{Total number of inactive business taxpayers with validated and End dated Tax Types and Form Types}}{\text{Number of inactive business taxpayers determined by ISG}} \times 100$	2.00	2.00	2.00	N/A	CSS
7 Overall Satisfaction Feedback of Taxpayer	Overall Satisfaction Rating of 4.00 (Manual and online from other channels)	$\frac{\text{Total Level of Satisfaction}}{\text{Total number of respondents}}$ <p>*Total Level of Satisfaction = Sum of all ratings given by taxpayers per customer satisfaction survey form</p>	2.00	N/A	2.00	N/A	Planning and Management Service - RSD



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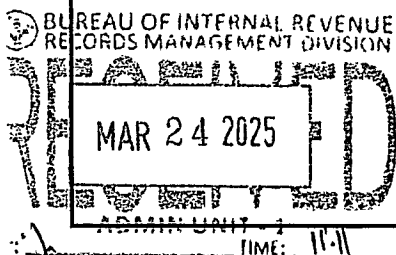
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8 Taxpayer Awareness Program	At least 10 points per month	<p><i>Number of taxpayer awareness activities conducted per month</i></p> <p>*An amended RMO will be issued (Amendment to RMO No. 27-2022)</p>	2.00	N/A	2.00	N/A	CSS
9 Percent of administrative cases acted upon	80% of the total number of administrative complaints/cases were acted upon	<p>$\frac{\text{Number of administrative cases acted upon}}{\text{Total number of administrative cases filed}} \times 100$</p> <p>(Note: "Acted upon" pertains to cases with decision and order)</p>	2.00	2.00	N/A	N/A	Internal Affairs Service
10 RATE cases	One (1) significant case per semester per RDO	<p>$\frac{\text{Number of cases filed}}{\text{Target for the period}} \times 100$</p>	2.00	2.00	2.00	N/A	Enforcement and Advocacy Service
11 Oplan Kandado	<p>One (1) accomplished case* per semester per RDO</p> <p>*The subject establishment either: a. Was approved for closure; or b. Fully complied with and paid the findings contained in the 48-Hour Notice/5-Day VAT Compliance Notice.</p>	<p>$\frac{\text{Number of Accomplished cases}}{\text{Target for the period}} \times 100$</p> <p>  </p>	3.00	3.00	3.00	N/A	ODCIR - Operations Group
12 Audit Effort	3% of assigned collection goal achieved RDOs, RLTD, ELTAD, and LTDO	<p>$\frac{\text{Collection from Audit (eLAs & TVNs)}}{\text{Assigned Collection Goal}} \times 100$</p> <p>(*Net of voluntary compliance collections from withholding tax on compensation income, TRA of NGAs, withholding taxes of LGUs, SARO and Taxes on ONETT)</p>	3.00	3.00	3.00	3.00	Assessment Service (AS)/Large Taxpayer Service (LTS)

CY 2025 OPERATIONAL KEY PERFORMANCE INDICATORS (KPIs)

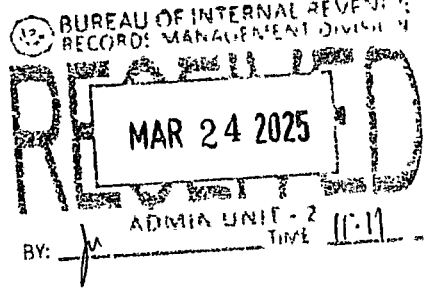
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				RRs	RDOs	LTS	
13 Increase in collection by 10% of previous year's audit collection goal	10% increase from previous year's audit collection goal for LTVAU, RRs with VATAS (RRs 5, 6, 7A, 7B, 8A and 8B) and Office Audit Section	Previous year's audit collection goal x 110%	3.00	3.00	N/A	3.00	AS/LTS
14 Audit Efficiency	75% of eLAs handled were transmitted by the investigating office and acknowledged by the reviewing office At least 75% of eLAs/cases received from investigating office were reviewed	$\frac{\text{Number of reported cases covered by eLAs transmitted by investigating office and acknowledged by the reviewing office}}{\text{Total number of cases covered by eLAs handled by the investigating office}} \times 100$ $\frac{\text{Number of reviewed eLAs/cases}}{\text{Total number of eLAs/cases received for review from investigating office (RDOs)}} \times 100$	3.00	3.00	3.00 N/A	3.00 N/A	Assessment Service (AS)/Large Taxpayer Service (LTS)
15 Expedite recruitment of new personnel and promotion of qualified employees	<u>Recruitment</u> Filled up Entry Level Positions at the rate of: • 100% for twenty (20) or less vacant positions, and/or • 80% for more than twenty (20) vacant entry level positions. <u>Promotions</u> 100% of employees included in the list of promotable employees with complete documents submitted	<u>Recruitment</u> $\frac{\text{Number of signed appointments for vacant entry level positions}}{\text{Total number of vacant entry positions}} \times 100$ or $\frac{\text{Number of signed appointments for vacant entry level positions}}{80\% \text{ of the total number of vacant entry level positions}} \times 100$ <u>Promotions</u> List of Promotables with complete documents to be submitted on or before: 1st Semester - August 31st of the current year 2nd Semester - February 28th of the following year	1.50 1.50	1.50	N/A N/A	N/A 1.50	Human Resource Development Service



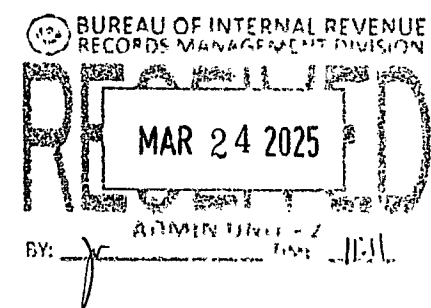
CY 2025 OPERATIONAL KEY PERFORMANCE INDICATORS (KPIs)

ANNEX A

KPI	TARGET	FORMULA	KPI Weight	Applicable KPI Weight for Implementing Offices			Monitoring Office
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16 Budget Utilization Rate (BUR)	Obligation BUR: 90% budget utilized	Obligation BUR:(Net of Personnel Services) $\frac{\text{Total Obligations}}{\text{Total allotment}} \times 100$	1.50	1.50	N/A	N/A	Finance Service
	Disbursement BUR: 80% budget obligations paid	Disbursement BUR:(Net of Personnel Services) $\frac{\text{Total disbursement (cash and non - cash)}}{\text{Total obligations (Net of Not Yet Due and Demandable Obligations)}} \times 100$	1.50	1.50	N/A	N/A	
17 Posting of procurement and award to PhilGeps	Quantity: 100% of Invitation To Bid, Request for Expression of Interest, Request for Quotations if the ABC of the items to be procured is P50,000.00 and above, Notice of Award, approved and notarized Contract with Notice to Proceed and approved Purchased/Job Order with Supplier/ Contractor/Consultant's conforme as required by law posted Quality: 100% compliance	$\frac{\text{Actual posting}}{\text{Required posting}} \times 100$ 	3.00	3.00	N/A	N/A	Admin. Service
TOTAL			100.00	94.00	81.00	70.50	

ACCOMPLISHMENT REPORT ON OPERATIONAL KEY PERFORMANCE INDICATORS (KPIs)
FOR THE PERIOD OF (SEMESTER/CY)
OFFICE (LTNOADs/LTDs Cebu & Davao/ELTFOD/LTVATAU/LTCED/ RDOs/Regional Divisions)

Annex B

Operational KPIs	Target	Accomplishment			Remarks (Explanation of under/over performance)
		A= Numerator	B = Denominator	C= $\frac{(A) / (B) \times 100\%}{\text{Target}}$	
(As indicated in Annex A)	(As indicated in Annex A)	(Refers to the numerator of the formula in Annex A)	(Refers to the denominator of the formula in Annex A)		

NOTE: All figures should be expressed in two decimal places.

I attest to the accuracy of the information contained herein.

 (Signature Over Printed Name)
 (RDOs/Regional Divisions/LT-Divisions)

CONSOLIDATED ACCOMPLISHMENT REPORT ON OPERATIONAL KEY PERFORMANCE INDICATORS (KPIs)
FOR THE PERIOD OF (SEMESTER/CY)

Annex C

OFFICE (Large Taxpayers Service/Revenue Region No.)

Operational KPIs	Target	Accomplishment			Remarks (Explanation of under/over performance)
		A= Numerator	B= Denominator	C = $\frac{(A) / (B) \times 100\%}{\text{Target}}$	
<i>(As indicated in Annex A)</i> Sample: 1. Collection Performance RR No. 1 RDO 1 RDO 2 RDO 3 LTS LTD Cebu LTD Davao	<i>(As indicated in Annex A)</i>				

NOTE: All figures should be expressed in two decimal places.

I attest to the accuracy of the information contained herein.

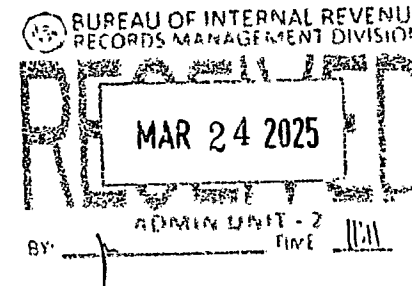
 (Signature Over Printed Name)
 (Regional Director/ACIR-LTS)

EVALUATION REPORT ON OPERATIONAL KEY PERFORMANCE INDICATOR (KPI)

Annex D

Operational Key Performance Indicator: (Pls refer to Annex A)

Office	Target	Percentage of Accomplishment (%)	KPI Weight (Assigned KPI Weight)	Score (Score = % of accomplishment X KPI weight)	Ranking of Offices (Highest to lowest)
A. Revenue Region and LTS	(As indicated in Annex A)				
B. RDOs and LT Divisions					



NOTE: All figures should be expressed in two decimal places.

I attest to the accuracy of the information contained herein.

 (Signature Over Printed Name)
 (Assistant Commissioner/Measure Owner)

CONSOLIDATED EVALUATION REPORT FOR THE CY ____ OPERATIONAL KEY PERFORMANCE INDICATORS
 (Large Taxpayers Service, Revenue Region Nos 1 to 19 and Revenue District Office Nos. 1 to 115)
BUREAU OF INTERNAL REVENUE

Annex E

Name of Office	KPI Score										TOTAL		OVERALL RATING (%)
	Applicable KPI Weight										KPI SCORE (A)	APPLICABLE KPI WEIGHT (B)	C = $\frac{(A)}{(B)} \times 100$
	KPI __	KPI __	KPI __	KPI __	KPI __	KPI __	KPI __	KPI __	KPI __	KPI __			
LTS RRs 1 to 19													

NOTE: All figures should be expressed in two decimal places.

I attest to the accuracy of the information contained herein.

Prepared by:

 Chief, Planning and Programming Division

Approved by:

 ACIR, Planning and Management Service

