
Appendix 3: Business Systems Modernization Projects Descriptions

The Business Systems Modernization projects that directly support business goals are briefly described below. Some of these already exist and have teams identified.

Customer Communication

The focus of this project is to provide centralized national call management capability so that taxpayer calls can be routed to any IRS assistor in the country. In addition, this project will concentrate on improved self-service telephone and Internet services for taxpayers.

e-Services

The goal of this project is to foster easy to use electronic products and services which provide the taxpayer the ability to conduct all of their interactions electronically and allows account management among payers, employers and tax authorities. By 2007, IRS e-Services will enable the agency to exceed the Congressional mandate by electronically transacting with more than 80 percent of U.S. taxpayers while achieving a 90 percent customer and employee satisfaction rate.

Customer Account Data Engine (CADE)

This project will replace the master files and Integrated Data Retrieval System (IDRS) with new technology, new applications and new databases. CADE will allow employees to post transactions and update taxpayer accounts and return data from their desks. Updates will be immediately available to anyone who has authorized access to data and will provide a complete, timely and accurate account of the taxpayer's information. Taxpayers will be removed from the master files as they are added to modernized systems. Over several years, the master files and IDRS will shrink as CADE grows.

Correspondence and Document on Demand Imaging (CADDI)

This project will image taxpayer correspondence and selected paper tax returns to support more efficient customer service and case management. Today, correspondence is often not available to customer service representatives (CSRs) and examiners as they are inter-

acting with the taxpayer. Without access to this key information, IRS employees are not able to consider information provided by the taxpayer, so they do not get the service that they deserve. CADDI will allow employees to see an electronic image of correspondence in the electronic case folder.

Customer Relationship Management Core (CRM Core)

The CRM Core project will provide the central, shared electronic case folders needed for case management. Creating the case management information in a central and accessible repository will significantly benefit taxpayers and employees who are involved in any case management activity. CRM Core will enable an end-to-end view of the interactions between the IRS and its customers. Taxpayers expect the IRS to have this essential capability in place when they receive a call to discuss their account.

Customer Relationship Management Exam (CRM Exam)

The CRM Exam project focuses on reducing the time and increasing the quality in the exam process. The project will investigate using commercial-off-the-shelf (COTS) software and integration with common CRM Core capabilities and a risk-based approach to identifying workload. The goal is to reduce the current two-to-four-year cycle to a process that will be completed in 12 to 18 months while providing more support to exam to identify and resolve important issues.

Customer Relationship Management Collection (CRM Collection)

This project is focused on reengineering the entire collection process in two major ways. The first is using technology to intervene more quickly and in the most effective way, in every collection situation based on the history and risk in the taxpayer's account. The second is ensuring every employee has the information and the tools needed to resolve the taxpayer's issues quickly and efficiently while observing the taxpayer's rights. This may involve sending a notice, making a telephone call or having a revenue officer visit the taxpayer.

Customer Relationship Management Registration (CRM Registration)

This project will incrementally improve those processes that support taxpayer identification number assignments, S corporation elections, exempt organization status determinations, power of attorney and reporting agent assignments, bond approvals and transfer pricing approvals. It will reduce the elapsed time from application until assignment and incrementally develop systems supporting processes to provide integrated on-line support.

Integrated Research

This project will build systems to improve research to facilitate the early identification of new compliance issues, workload decisions and educational outreach. It will provide data-driven analysis of taxpayer behavior and enforcement activity, and enable continuous feedback from case resolution activities for use in pre-filing activities.

Customer Relationship Management Outreach (CRM Outreach)

CRM Outreach will build new processes and maximize the use of modernized and legacy electronic technology support for conducting proactive taxpayer outreach activities to inform, assist and educate.

Integrated Human Resource System (IHRS)

This project will acquire and implement a single system for IRS employee data and Human Resources (HR) services. The project is part of a Treasury-wide HR system integration utilizing commercial-off-the-shelf (COTS) technology. The project's strategic goals are to reduce the administrative burden associated with managing the IRS work force, improve development opportunities for IRS people and help improve job satisfaction.

IFS-ERP (Integrated Financial Systems-Enterprise Resource Planning)

The Integrated Financial Systems project will incrementally build an agency-wide system that collects and provides standards-compliant administrative and custodial financial management information. Step one is to build two corporate data warehouses. The first will manage taxpayer revenue data and to produce the associated required custodial sub-ledgers. The second will form the basis for corporate financial and performance measures information at the business unit level. This will provide a revised budgeting and performance measurement capability. In addition, a payment information database will be created to properly track and clarify payment at the time of receipt.