

Projects

Gaps Addressed

Customer Account Data Engine (CADE)

- Provide timely, accurate account updates and settlement with complete and integrated data
- Shorten time between receipt of info and sending out notice to taxpayer
- Clarify notices
- Increase electronic means of notification
- Provide daily processing and real-time posting
- Accelerate refunds and notices and improve customer service
- Increase level of early fraud detection

Customer Relationship Management (CRM) Core

- Provide timely, accurate account updates with complete and integrated data
- Provide universal access to case history
- Provide capability to assign cases based on skill
- Provide broad view of customer contact
- Provide risk-based case prioritization
- Provide daily processing and real-time posting
- Receive and respond to inquiries via multiple media
- Provide complete history of contact

CRM Outreach

- Provide focused outreach to taxpayer segments
- Provide automated informing capability
- Clarify forms and publications
- Leverage external organizations with proactive outreach activities

Correspondence and Document on Demand Imaging (CADDI)

- Increase electronic means of corresponding with the IRS
- Accelerate transmission of correspondence to the appropriate case-worker and improve document tracking
- Reduce overall manual effort and physical storage
- Support improved customer service

CRM Collection

- Significant cycle time reduction and resolution of cases
- Improved probability for collection as a result of resolving collection cases earlier
- Empowerment of employees to vary case treatments

CRM Examination

- Reduce exam cycle time to 12-18 months
- Risk-based case selection allows for more efficient allocation of resources

e-Services

- Increase level of electronic filing
- Provide more convenient methods of filing
- Increase accuracy of data capture

CRM Registration

- Provide automated method for status tracking

Integrated Financial Systems

- Need for improved receivables collection
 - Need for accurate receivables management and documentation
 - Need sub-ledger of revenue, refunds, receivables and payables integrated with general ledger
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