

IRS Software Developer Conference



Online Services

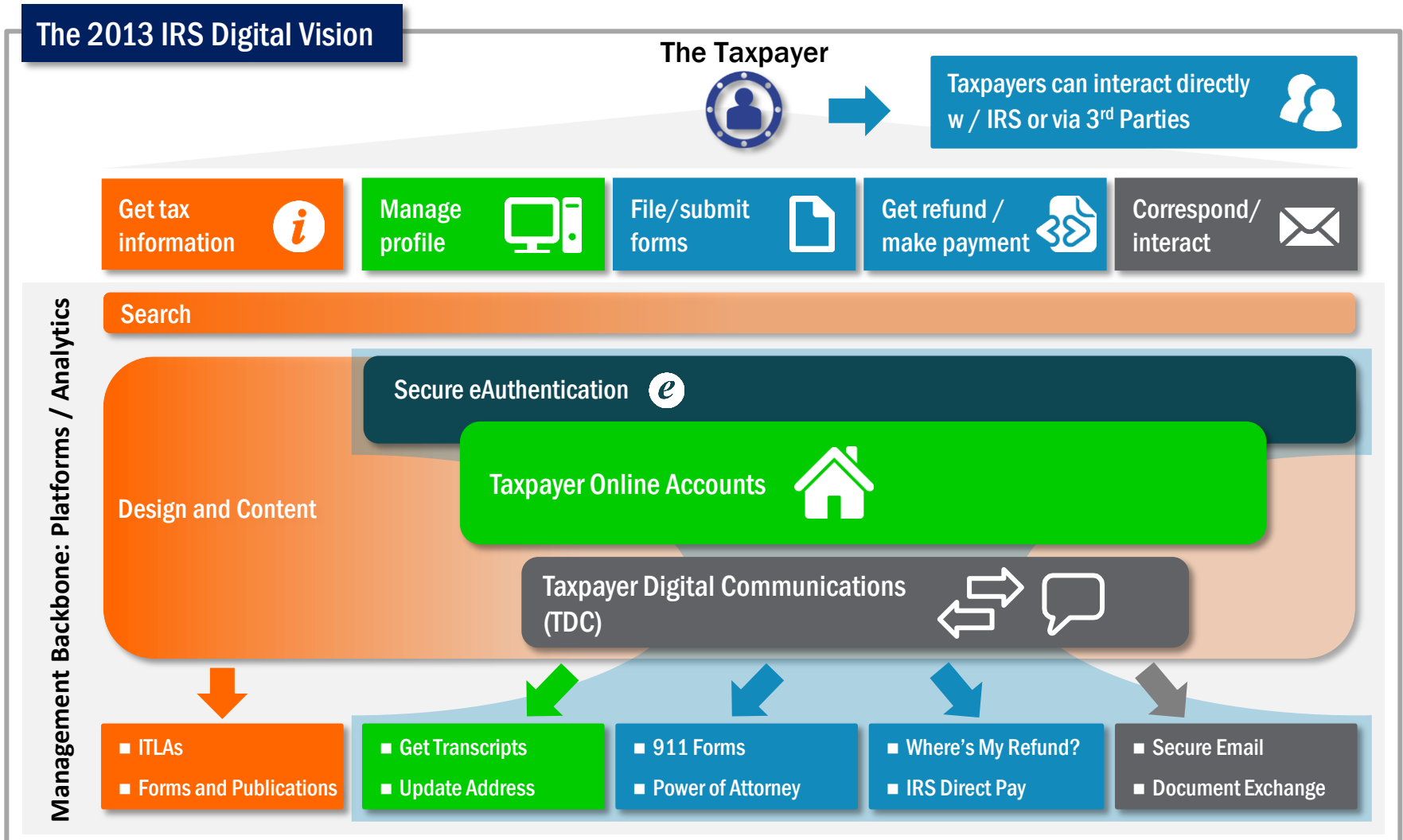
**New Carrollton Federal Building
Lanham, MD
June 17, 2015**

Agenda

- Opening Remarks
Kevin Morehead
Acting Director, Accounts Management

Jim Weaver
Director, Product Management
- Taxpayer Digital Communications
Trish Evans & David Ellison
- Account
Michael Lin, Karl Reed, &
Kevin Morehead
- Wrap up
Kevin Morehead & Jim Weaver

Search, improved content, the online account, taxpayer digital communications, and eAuthentication are the key elements of the digital future on IRS.gov



IRS Digital 2015

Taxpayer Digital Communications (TDC)

Communicating with the IRS digitally provides taxpayers with service channels already common elsewhere.

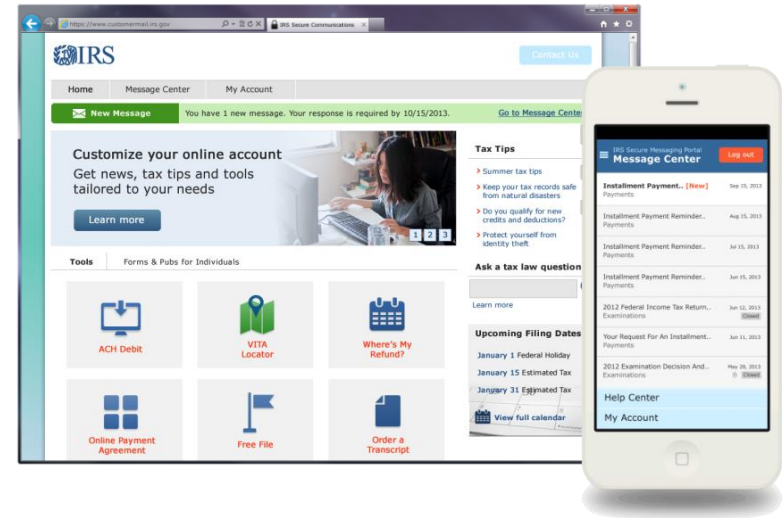
IRS Today








Traditional Communications

- Mail
- Phone
- Fax
- In-Person

IRS of the Future



Taxpayer Digital Communications

-  Secure Messaging
-  Video Meetings
-  Text Chat
-  Co-browsing
-  Click to Call

TDC Funding and Supporting IT Initiatives

TDC Platform Procurement

- Software-as-a-Service (SaaS) delivery model
- Will be certified as NIST/IRS Cyber-Security, Privacy compliant



Supporting IT Efforts

- eAuth for Service Providers (Mini-Federation)
 - **Launch Dependency for Pilots**
 - Extends eAuth to externally hosted apps
 - **Work underway**
- NOTCON xPression Enhancements
 - Digital delivery of CP521, other notices
 - **Pending Scheduling**
- 3. Authorization Webservice
 - Allows online applications to honor CAF permissions
 - **Pending Scheduling**
- 4. Document Upload
 - Allows upload and submission of documents outside of pre-defined correspondence processes
 - **Pending Scheduling**

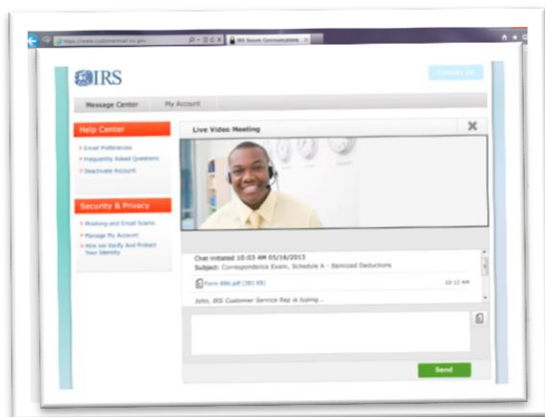
TDC Capability and Pilot Recap

Secure Messaging Pilot: Use Case Summaries



- **Correspondence Exam:** Use secure messaging to replace paper and phone correspondence between the taxpayer and the tax examiner for Schedule A - Itemized Deductions exams.
- **Installment Agreement Monthly Reminder Notice:** Migrate taxpayers from receiving monthly paper CP521 reminder notices to a webmail notice/reminder.
- **ACA Insurance Provider Fee (IPF) & Branded Prescription Drug (BPD) Correspondence:** Accelerate correspondence with drug manufacturers and health insurance providers using secure digital correspondence.
- **TAS Levy & EITC:** Reduce case time by using secure messaging for taxpayer correspondence and digital document transfer. Add efficiencies to TAS work with internal IRS for case resolution.

Live Communications Key Features



Real-time online **Text Chat**



Click-to-Call using IP voice communication



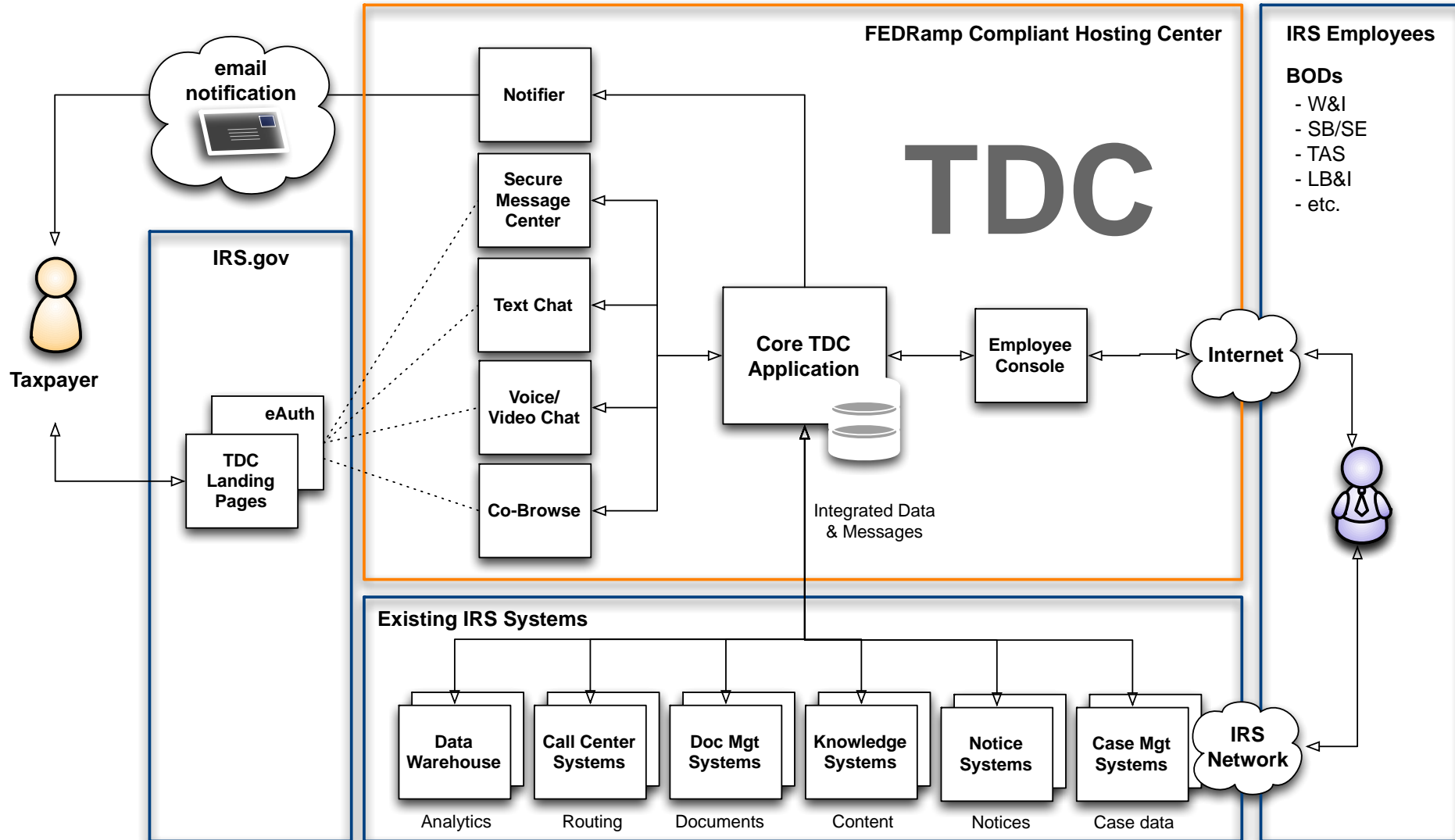
Online **Video Conferencing** for scheduled meetings



Co-browsing allows digital content sharing and session recording



TDC Technology Schematic



TDC: A Gateway for End-To-End Digital Processes

1

Correspondence Exam via Secure Messaging & Electronic Signature

2

Leading to Online Payment Agreement

3

With Electronic Notices & Direct Pay Option

IRS

Jane Taxpayer | Settings | Logout

Secure Email

Inbox | Sent Mail

Last visit: April 2, 2014 10:07am

From	Subject	Status	Date
Smith, Sarah	Re: Taxpayer Advocate Assistance Request (Case #100100)	Open	3:02pm
Smith, Sarah	Re: Taxpayer Advocate Assistance Request (Case #100100)	Open	April 2
Smith, Sarah	Re: Taxpayer Advocate Assistance Request (Case #100100)	Open	March 17
			March 5
			March 5
			March 5

OTHER ACTIONS

Make a Payment

New Message

Notice: CP521e

Subject: Installment payment reminder, CP521e

From: Payments

08:00 AM 08/05/2013

Status: Open

Summary of Income Tax Examination Changes

1. Total Adjustments to Income	\$	4,512
2. Corrected Taxable Income	\$	59,159
3. Tax	\$	12,022
4. Less Credits	\$	11,522
5. Balance Due	\$	500

Electronically Sign Your Agreement

Sign

Elect Payment Option

Pay Now (Direct Pay) OR Establish Payment Agreement

Attachments

Final 4549.pdf (1.2 MB)

Request for Monthly Payment Plan

Total amount owed if paid within the next 10 days: **\$28,446.28**

Step 1: Payment Amount

Please enter your proposed monthly payment amount. Enter a whole dollar amount without commas or decimals.

Monthly Payment Amount

\$

Step 2: Payment Due Date

Step 3: Type of Monthly Payment Plan

Please select the type of monthly payment plan you would like to set up:

- ☐ Direct Debit Installment Agreement (\$52.00 user fee applies)
This agreement establishes automatic payments from your banking account.
- ☐ Payroll Deduction Installment Agreement (\$120.00 user fee applies)
This agreement establishes automatic payments from your paycheck.
- ☐ Installment Agreement with Paper Statements (\$120.00 user fee applies)
This agreement requires you to send in payments every month.
- ☒ **Installment Agreement with Electronic Statements (\$20.00 user fee applies)**
This agreement requires you pay online or send in payments every month.

IRS

Jane Taxpayer | Settings | Logout

Secure Email

Back to Inbox

New Message

Notice: CP521e

Subject: Installment payment reminder, CP521e

From: Payments

08:00 AM 08/05/2013

Status: Open

Notice Date: August 05, 2013

Social Security Number: 100-50-0133

Pay your installment payment now Online

Monthly payment due: **\$1,000.00**

Pay Online

Your monthly payment of \$1,000.00 is due on August 15, 2013. If you can't pay your month bill by this date, call us at 1-800-350-2400. If you wish to mail in a payment, print the attached stub.

Billing Summary

Tax you owed	\$4,396.50
Failure-to-pay penalty	\$14.75
Interest charges	\$36.50
Remaining balance	\$5,847.81
Monthly payment due by August 15, 2013	\$1,000.00

Welcome to Direct Pay!

Use this secure service to pay your tax bill or make an estimated tax payment directly from your checking or savings account at no cost to you. You'll receive instant confirmation that your payment has been submitted. Just follow the easy steps below. Bank account information is not retained in IRS systems after payments are made.

Note: You must have a valid Social Security Number (SSN) to use this application. This application cannot accommodate Individual Taxpayer Identification Numbers (ITINs).

It takes just 5 easy steps to make a payment:

Step 1	Step 2	Step 3	Step 4	Step 5
Provide your tax information	Verify your identity	Enter your payment information	Review and electronically sign the transaction	Print or record your online confirmation number

PAY NOW

Account

The Account Product vision, objectives, and key results focus on the individual taxpayer

Vision

Provide a ***modern, online and mobile product*** with increasingly robust capabilities available to Account users providing tax account status, payment functionality, compliance information, and on-demand self-service.

Objectives

- **Increase satisfaction among all individual taxpayer groups** (Ensuring taxpayer self-service needs are met efficiently and effectively online)
- **Increase internal IRS efficiency** (Shifting low value, high volume taxpayer service interactions online)
- **Consolidate IRS service options to a centrally accessible location online** (Position online self-service as the primary channel for all taxpayer interactions with the IRS)

Key Results

- Reduce IRS customer service costs
- Reduce call volumes
- Streamline more efficient cross-channel IRS customer care
- Integrated online and mobile IRS user experiences
- Higher online customer satisfaction
- Potential for improved taxpayer compliance and faster payments capture

The Services and Enforcement Executive Steering Committee approved 4 features for the first release of Account

Balance Due

Make a Payment

Payment History

Tax Records

Notional representation of Account screen presented to an individual taxpayer after authenticating – wireframes for interaction design and requirements elicitation purposes only – top and bottom views

Top view



The top view wireframe shows the IRS account interface for a user named Andre. It includes a header with the IRS logo, a profile icon, and a logout button. The main content area is divided into several sections: a welcome message, an account summary showing the 2014 tax return status and a balance due of \$644, payment options for bank account or card, and an overview by year table. The bottom of the screen features a footer with the IRS logo and 'Online Services' text.

IRS Profile | Logout

Welcome, Andre

Account Summary

Return Status
2014 tax return processed

Balance due as of 5/30/2015
\$644 [\(details\)](#)

Payment Options

[PAY BY BANK ACCOUNT](#)

[PAY BY CARD](#)

Debit card fees: \$3-4; Credit card fees: 1.87% - 2.35% of payment amount

Need more time to pay?
[SET UP A PAYMENT PLAN](#)

Overview by Year

Year	Status
2014	Taxes due: \$644 >
2013	Taxes paid in full >
2012	Refund sent >

IRS Online Services

Bottom view



The bottom view wireframe shows the IRS account interface for a user named Andre, focusing on tax records and payments. It includes a header with the IRS logo, a profile icon, and a logout button. The main content area is divided into several sections: recent payments, tax records for 2013, filing status, adjusted gross income, total exemptions, deductions, taxes due for 2013, payments made, and taxes paid. The bottom of the screen features a footer with the IRS logo, privacy policy, and accessibility links, and a user profile section with icons for Andre, John, and Kylie.

Recent Payments

Date	Year	Amount
April 8, 2014	2013	\$580

Tax Records

Key information from your tax return as originally filed

2013

[Filing Status](#): **Single**

[Adjusted Gross Income](#) \$38,000

[Total Exemptions](#) 1

[Deductions](#) \$6,300

Taxes due for 2013 \$3,544

Payments Made (incl. withholding) \$3,000

Taxes paid **\$544**

[DOWNLOAD TAX RECORDS](#)

IRS Privacy Policy | Accessibility

Andre John Kylie

Notional representation of Account – present the taxpayer with information about his **cumulative balance due**, and view the years for which a **balance** exists with the details about each year.

Account Summary

Return Status
2014 tax return processed

Balance due as of 5/30/2015
\$644 ([details](#))

Balance Details ✕
Original balance \$532
Penalties \$100
Interest \$12
Balance due \$644

Debit card fees: \$3-4; Credit card fees:
1.87% - 2.35% of payment amount

Need more time to pay?

[SET UP A PAYMENT PLAN](#)

Overview by Year

Year	Status	
2014	Taxes due: \$644	>
2013	Taxes paid in full	>
2012	Refund sent	>

Notional representation of Account – present the taxpayer with information about his **payment history** for prior years...

Recent Payments

Date	Year	Amount
April 8, 2014	2013	\$580

Notional representation of Account – present the taxpayer with information about his tax records

Tax Records

Key information from your tax return as originally filed

2013


▼

Filing Status: **Single**

<u>Adjusted Gross Income</u>	\$38,000
<u>Total Exemptions</u>	1
<u>Deductions</u>	\$6,300

Taxes due for 2013	\$3,544
Payments Made (incl. withholding)	\$3,000

Taxes paid	\$544
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 **DOWNLOAD TAX RECORDS**

Download Tax Records

View, print, or download your tax records using the IRS online application **Get Transcript**.

CONTINUE

This will open in a new browser tab or window.

CANCEL



Thank you for the opportunity to be here – please share your thoughts with us.