



MANUAL TRANSMITTAL

Department of the Treasury
Internal Revenue Service

1.1.29

FEBRUARY 15, 2024

EFFECTIVE DATE

(02-15-2024)

PURPOSE

- (1) This transmits new IRM 1.1.29, Organization and Staffing, Office of Online Services.

MATERIAL CHANGES

(1)	IRM 1.1.29	various editorial changes throughout IRM
	IRM 1.1.29..2	IRM section removed due to an operational reorganization.
	IRM 1.1.29.3	IRM section removed due to operational an reorganization.
	IRM 1.1.29.4	IRM section renamed to Program Management and renumbered to 1.1.29.1.1 due to an operational reorganization.
	IRM 1.1.29.5	IRM section renumber to 1.1.29.1 due to an operational reorganization. Expanded on Front Office responsibilities and added branches to Front Office.
	IRM 1.1.29.5.1	IRM section removed due to an operational reorganization.
	IRM 1.1.29.5.2	IRM section removed due to an operational reorganization.
	IRM 1.1.29.3	IRM section added due to an operational reorganization.
	IRM 1.1.29.3.1	IRM section added due to an operational reorganization.
	IRM 1.1.29.3.2	IRM section added due to an operational reorganization.
	IRM 1.1.29.3.3	IRM section added due to an operational reorganization.
	IRM 1.1.29.3.4	IRM section added due to an operational reorganization.
	IRM 1.1.29.4	IRM section added due to an operational reorganization.
	IRM 1.1.29.4.1	IRM section added due to an operational reorganization.

IRM 1.1.29.4.2	IRM section added due to an operational reorganization.
IRM 1.1.29.4.3	IRM section added due to an operational reorganization.
IRM 1.1.29.5	IRM section added due to an operational reorganization.
IRM 1.1.29.5.1	IRM section added due to an operational reorganization.
IRM 1.1.29.5.2	IRM section added due to an operational reorganization.
IRM 1.1.29.5.3	IRM section added due to an operational reorganization.

EFFECT ON OTHER DOCUMENTS

IRM 1.1.29 dated August 16, 2018 is superseded.

AUDIENCE

All employees in all business units

/s/ Karen Howard
Director, Office of Online Services

1.1.29

Office of Online Services

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1.1.29.1

(02-15-2024)

Office of Online Services

- (1) The Office of Online Services (OLS) was established to help lead business transformation efforts focused on digital tax administration, improvements to the tax experience, and consistent enterprise-wide digital service options.
- (2) OLS is composed of four units that work together, along with partners, to create and improve the taxpayer experience. These division are:
 - Operations
 - Digital Products
 - IRS.gov
 - User Experience Services
- (3) Coordinates with Business Units (BU) and Information Technology (IT) leadership to help facilitate change by:
 - Creating transformational services
 - Encouraging adoption and integration of digital tools
 - Incorporating business processes into IRS operation .
- (4) **Vision:** Continuously partner to innovate and transform the taxpayer experience side of interaction experiences.
- (5) **Mission:** Advocate for customers and lead digital transformation by aligning people and processes.
- (6) **Goals:**
 - Driving efficient operations by empowering taxpayers to digitally self-serve
 - Advancing data and analytics in the areas of online behavior tracking, qualitative and quantitative research, and sentiment analysis to deepen awareness of the customer .
- (7) **Cross-organizational responsibilities:**
 - Enhance content management and search capabilities
 - Enhance personas, journey maps, and customer research
 - Develop cross-channel customer feedback and analytics
 - Advance consistent experiences per the 21st Century Integrated Digital Experience Act (IDEA)
 - Ensure consistent application of Service wide standards and industry best practices for digital content creation
 - Advance internal operations (e.g., moving forward AGILE/SAFe release cycles, championing use of collaboration tools, etc.)
 - Recruit and retaining core skills
 - Expand OLS outreach programs (e.g., Digital Days, etc.)
- (8) The Director of Online Services reports to the Deputy Commissioner for Services and Enforcement (DCSE).

1.1.29.2

(02-15-2024)

Operations Division

- (1) Operations unit is responsible for supporting the Director of Online Services and the OLS operating divisions to ensure consistent operations and the effective management of resources.
- (2) **Branches:**
 - Program Management Office

(3) **Responsibilities:**

- Plan and execute the OLS annual budget by supporting development of investment requests
- Support employees' software and hardware needs
- Oversees recruitment, employee development, hiring, performance management, policy, and training
- Respond to requests from within OLS for internal and external stakeholders
- Communicate and Engage to develop, modify, and execute the OLS Communication Strategy by integrating OLS Division personnel and activities where appropriate to coordinate messaging, assess results, plan for future activities, provide status to stakeholders, solicit feedback and ensure the development and maintenance of a wide range of digital engagements, tools, products, and processes
- Lead audit activities to facilitate and track responses to oversee requests and audits related to OLS programs
- Support for OLS employees by securing equipment, supplies and facilities

(4) The Functional Chief of the Operations unit reports to the Director of Online Services

1.1.29.2.1
(02-15-2024)

**Program Management
Office Branch**

(1) The Program Management Office (PMO) branch provides Program Management guidance and support for OLS initiatives.

(2) **Responsibilities:**

- Ensures effective execution and strategic alignment
- Enhances project management capabilities, standardizes processes, improves the success rate of projects
- Provides several vital functions and benefits
- Aligns all projects with the IRS's strategic objectives
- Develops and implements standardized project management methodologies, practices, and processes
- Optimally allocates and utilizes project resources
- Monitoring project performance against predefined metrics and Key Performance Indicators (KPIs)
- Fosters continuous improvement and learning by facilitating knowledge sharing among project managers and teams
- Identifies, assesses, and mitigates project risks
- Supports change management efforts
- Facilitates effective communication between project stakeholders

(3) The PMO enables OLS to navigate complex projects and dynamic business environments while improving project outcomes.

(4) The supervisor of the Program Management Office reports to the Functional Chief of Operations Unit.

1.1.29.3

(02-15-2024)

Digital Products Division

- (1) Digital Products (DP) combines a pursuit of the IRS mission with a drive for innovation and a motivation to improve the customer experience in order to deliver a streamlined and integrated experience for all audiences served by the IRS.
- (2) **Branches:**
 - Account Experiences
 - Open Access Experiences
 - Product Strategy
 - Taxpayer Digital Communications
- (3) **Mission:** Engage internal and external partners, and apply modern design practices, proven product management techniques, and agency-wide user research to new and existing initiatives.
- (4) **Vision:** Strategy, Roadmap, and feature definition for online tools, and their supporting business processes, in support of the IRS's strategic plan and customer service experience.
- (5) **Responsibilities:**
 - Identify the heart of the customer need or business challenge
 - Bring innovative solutions to fruition
 - Collaborate with end users and business stakeholders to validate concepts and ensure customers' needs are met
 - Analyze results and continuously improve digital services to empower and enable taxpayers to understand and meet tax responsibilities online
 - Managers work with technology teams to ensure the product is being implemented according to the requirements and user stories
- (6) The Director of the Digital Products unit reports to the Director of Online Services.

1.1.29.3.1

(02-15-2024)

Account Experiences Branch

- (1) Provides product management leadership for authenticated services available to a variety of taxpayers.
- (2) **Sections:**
 - Individual Taxpayers
 - Business Products
- (3) Works with internal business and IT stakeholders to develop and prioritize features, craft requirements, highlight business process changes and develop and deploy solutions aimed at improving taxpayer digital services.
- (4) Serve as product managers responsible for the overall success of the products, with a focus on building tools, processes and services based on customer needs, insights, and user experiences.
- (5) Services that require positive identity verification and authentication of users before access is granted:
 - Individual Online Account
 - Business Tax Account
 - Tax Professional Account

- (6) The Functional Chief of the Account Experiences branch reports to the Director of Digital Products.

1.1.29.3.1.1
(02-15-2024)

**Individual Taxpayers
Section**

- (1) Support Product Management activities related to Individual Online Account. This includes, but is not limited to supporting the Product Manager for Individual Online Account with the following:
- Metrics and analytics (in partnership with User Experience Services division)
 - Roadmap updates
 - Product backlog maintenance and grooming
 - Application content support
 - Outreach support (in partnership with the Product Strategy branch)
 - Research and analysis
 - Product performance monitoring
- (2) Crosses over with work supported by the Business Products section where both sections may support the development of a feature that cross applications.
- (3) The manager of the Individual Taxpayers section reports to the Functional Chief of the Account Experiences branch

1.1.29.3.1.2
(02-15-2024)

**Business Products
Section**

- (1) Support Product Management activities related to Business Products and Tax Pro Accounts. This includes, but is not limited to supporting the Product Manager for Business Tax Account and Tax Pro Account with the following:
- Metrics and analytics (in partnership with User Experience Services division)
 - Roadmap updates
 - Product backlog maintenance and grooming
 - Application content support
 - Outreach support (in partnership with the Product Strategy branch)
 - Research and analysis
 - Product performance monitoring
- (2) Crosses over with work supported by the Individual Taxpayers section where both sections may support the development of a feature that cross applications.
- (3) The manager of the Individual Taxpayers section reports to the Functional Chief of the Account Experiences branch

1.1.29.3.2
(02-15-2024)

**Open Access
Experiences Branch**

- (1) Drive critical user engagement and decision-making for the Service's unauthenticated applications – those that provide quick information and access to resources for taxpayers without necessitating identity proofing or authentication. These applications provide convenient and efficient resources for taxpayers who need to execute brief engagements with the IRS for simple or straightforward informational purposes.
- (2) Strive to support cross functional efforts to design, build, improve, and maintain applications in order to facilitate tax administration.
- (3) The Functional Chief of the Open Access Experiences branch reports to the Director of Digital Products.

- 1.1.29.3.3
(02-15-2024)
Product Strategy Branch
- (1) Focus on improving Digital Products' ability to offer tools and services to taxpayers via business units and other partners.
 - (2) Provide leadership and support in areas such as initiative planning, execution, process engineering and roadmap development and plays a major role in communications with partners and stakeholders.
 - (3) Play a leadership role in business development (i.e. identifying new opportunities for the introduction of online services) as well as outreach efforts, including the Nationwide Tax Forums.
 - (4) The Functional Chief of the Product Strategy bunch reports to the Director of Digital Products.
- 1.1.29.3.4
(02-15-2024)
Taxpayer Digital Communications Branch
- (1) Serves as a program office for product managers and thought leaders for customer-facing tools such as Secure Messaging and chat functionality.
 - (2) **Sections:**
 - Technical Solutions
 - Content and Engagement
 - (3) Collaborate with our internal partners to build services that allow taxpayers to engage directly with the IRS in depth and detail. Services range from direct, high-level scripted interactions with taxpayers to secure, authenticated tools for exchanging information – including Personally Identifiable Information (PII) and tax-related documents – between taxpayers and authorized IRS personnel.
 - (4) The Functional Chief of the Taxpayer Digital Communications bunch reports to the Director of Digital Products.
- 1.1.29.3.4.1
(02-15-2024)
Technical Solutions Section
- (1) **Responsibilities:**
 - Provides strategy and management for the continued expansion of Secure Messaging for taxpayers and within the service.
 - Configures Secure Messaging for new installations and for the expansion of existing installations.
 - Provides technical support to CCSD for O&M activities.
 - Collaborates with IT on integration efforts.
 - Delivers post installation support to IRS business units
- 1.1.29.3.4.2
(02-15-2024)
Content and Engagement Section
- (1) **Responsibilities:**
 - Supports TDC program activities including Secure Messaging use case analysis, prioritization and installation efforts, as well as the program's strategic and operational efforts.
 - Supports the visioning and planning for enterprise online chatbots
- 1.1.29.4
(02-15-2024)
IRS.gov Division
- (1) IRS.gov unit oversees the site's content on a day-to-day basis working with partners across the IRS to publish, promote and improve the quality, findability, accessibility and usability of the content on irs.gov. IRS.gov unit works to increase capabilities and usability for users across all types of devices.
 - (2) **Branches:**

- Publishing
- Operations
- Content Strategy

- (3) **Mission:** Identify, plan and initiate projects to improve the IRS.gov website search features and functionality with the support of appropriate partners and stakeholders.
- (4) **Vision:** Make data-driven decisions to create a simple, powerful IRS website where the public can find what they, understand what they find and use the information quickly, easily and with confidence.
- (5) **Responsibilities:**
- Support and educate program owners and content originators in the development and refinement of material for the IRS.gov website
 - Enforce consistent standards and best practices for digital content creation
 - Ensure that the website's authoritative content is best suited for today's online environment. IRS.gov personnel work with business units to streamline online content and implement a consistent, user-centric, data-informed approach to providing online information and services to all users of the website.
 - Develop and maintain the information architecture for the IRS.gov website
 - Post important and informational content on the IRS.gov website
 - Optimize web content design, delivery and findability for IRS.gov website visitors
 - Help content owners to craft useful and easily understood content by educating them on and ensuring compliance to content standards and best practices
 - Ensure accessibility of the website in all manners and functions required by law and driven by web management best practices
 - Deliver content for Limited English Proficiency and other communities
 - Support identification, testing and deployment of new website features
 - Partner with IT to ensure IRS.gov technical capabilities meet business and taxpayer needs
- (6) The Director of the IRS.gov unit reports to the Director of Online Services.

1.1.29.4.1
(02-15-2024)

Publishing Branch

- (1) The Publishing branch publishes digital content on IRS.gov at the request of content owners representing all IRS business units. Content owners request publication of new content or modifications to existing content through the Content Management Request System (CRMS).
- (2) **Section:**
- IRS.gov Web Publishing
- (3) **Responsibilities:**
- Provide user acceptance testing (UAT) in support of development and functional deployment
 - Investigate and resolve broken links on IRS.gov

- Manage the annual content recertification process by providing notice to business units of content scheduled to unpublish within 90 days and act on business unit instructions to recertify and maintain content
- Provide quality assurance reviews for grammar, 508 compliance, spelling errors, and correct formatting for all requests prior to publishing
- Liaison with business stakeholders for large projects
- Work on special projects with business units
- Provide training for the CMRS to business units
- Provide WCMS training for new Producers and Strategists.
- Update the secondary navigation, megamenu, and footer as requested.
- Update the IRS.gov homepage as requested.
- Create and modify webforms
- Provide customer service to business units

(4) The Functional Chief of the Publishing branch reports to the Director of IRS.gov.

1.1.29.4.1.1
(02-15-2024)
**IRS.gov Web Posting
Section**

(1) **Responsibilities**

- Monitor the CMRS tickets and work them as they are submitted
- Review CMRS tickets to ensure understanding of the publishing requirements.
- Reach out to the content owner if the CMRS is unclear or missing information
- Assess the requested content to confirm the request aligns with publishing governance and standards
- Confirm impact of modifications to English language content on translated content and work with Linguistic Services to receive translations
- Update or create multilingual translations for content for all seven languages supported on IRS.gov
- Access WCMS to create, modify, archive, or recertify content as requested
- Provide a preview of the new or modified content if requested by the content owner
- Conduct section 508 testing to confirm published documents comply with regulations, remediate non-compliances where possible or refer the business unit to internal IRS resources responsible for 508 compliance
- Publish the new or modified content to live production on IRS.gov with business unit approval.
- Confirm the content renders as required and meets the online design guidelines
- Conduct quality assurance review to confirm technical quality standards are met

1.1.29.4.2
(02-15-2024)
Operations Branch

(1) Operations branch serves as the product owner for the IRS.gov WCMS, and technical team for the OLS IRS.gov Division.

(2) **Responsibilities:**

- Partner with internal and external stakeholders to understand business needs
- Perform technical analysis to transform functional needs into technical requirements

- Collaborate with Applications Development (AD) and stakeholders on the technical level to ensure business and taxpayer needs are understood and met
- Partner with AD to ensure business stakeholders understand technical functionality and system constraints.
- Leverage Agile methodologies to ensure stakeholders are in sync, and work is delivered through a standard and consistent process
- Set priorities and negotiate project schedules

(3) Operations branch lead the UAT process to:

- Establish and maintain UAT standards
- Interface with Subject Matter Expert (SME) to understand base testing needs
- Work with AD developers, AD testers, and SME to understand base testing
- Partner with Publishing and Content Strategy branch to ensure delivered system changes have testing coverage
- Partner with IT on regression testing scope

(4) Operations branch serves as technical and business analysts to support the division's strategic initiative goals and future system capabilities by:

- Providing technical analysis and proposals on new concepts
- Leveraging technical capability to research and prototype new functionality
- Serving as technical reviewer on IRS.gov WCMS contracts to ensure IRS business and technical needs are addressed

(5) System operations:

- Manage IRS.gov WCMS technical interfaces with external business partners ensure we minimize negative impacts to the system and taxpayer.
- Provide technical analysis on production issues.

(6) The Functional Chief of the Operations branch reports to the Director of IRS.gov

1.1.29.4.3
(02-15-2024)

Content Strategy Branch

(1) **Sections:**

- Concepts
- Solutions.

(2) Content Strategy branch works with these stakeholders to ensure the public can find, understand, and use the information they need to fulfill their tax obligations:

- IRS business units
- IT stakeholders
- External stakeholders such as Treasury and other government agencies

(3) **Responsibilities:**

- Establish content strategy for the IRS.gov website and applications
- Ensure the website content is accessible to everyone no matter how they choose to interact with IRS.gov including: People with disabilities,

Limited English Proficiency, Low-income or underserved people, People using mobile devices, and Other communities.

- Train and communicate for the content community
- Help content stakeholders and subject matter experts (SMEs) Service-wide to write and edit useful and easily understood content for the IRS.gov website and applications
- Review and apply analytics to content improvement
- Develop and maintain the information architecture, taxonomy and nomenclature
- Establish and enforce web standards and best practices
- Maintain Internal Revenue Manual
- Optimize web content design, delivery and findability for IRS.gov website visitors
- Support and train GovDelivery

- (4) The Functional Chief of the Content Strategy branch reports to the Director of IRS.gov.

1.1.29.4.3.1
(02-15-2024)
Concepts Section

- (1) Concepts section focuses on the following functional areas:

- Editorial
- Communications
- Information Architecture

- (2) Concepts section supports the following business units:

- Communications & Liaison (C&L)
- Tax Exempt and Government Entities (TEGE)
- Inflation Reduction Act (IRA) Tax Credits and Provisions

1.1.29.4.3.2
(02-15-2024)
Solutions Section

- (1) Solutions section focuses on the following functional areas:

- Operational Analytics
- Governance (Internal Revenue Manual)
- Web Strategy Practice and Training
- Granicus (GovDelivery) Support

- (2) Solutions section supports on the following business units:

- Wage & Investment (W&I)
- Business: Small Business Self Employed (SBSE) and Large Business and International (LB&I)
- Inflation Reduction Act (IRA) Tax Credits and Provisions
- Everyone else: National Headquarters (NHQ)

1.1.29.5
(02-15-2024)
User Experience Services Division

- (1) User Experience Services (UES) unit is responsible for defining integrated, human-centered customer experience strategies and solutions that merge data analytics, modern design principles, and user-focused research, testing, and analysis.

- (2) **Branches:**

- Analytics
- User Experience
- Design

(3) **Responsibilities:**

- Establish design intent
- Ensures brand consistency
- Deliver improved usability for IRS products and services
- Work with product managers, business owners, and delivery partners to empower the IRS to evolve with changing customer needs
- Make interacting with the IRS easier, clearer, and better for its customers
- Share tools, processes, and knowledge that drive a consistent customer experience across channels
- Accelerate the ideation process, providing conceptualization and pro to typing tools
- Ensure data-driven decision making that is informed by user research

(4) The Director of the User Experience Services unit reports to the Director of Online Services.

1.1.29.5.1
(02-15-2024)
Analytics Branch

(1) User Experience Analytics branch is responsible for analytics across the OLS.

(2) **Responsibilities:**

- Work with other OLS units, IRS stakeholders and the Department of Treasury to increase access to and use of valuable analytics
- Analytics requirements gathering activity, data governance, and engineering of reports
- Google Analytics platform at the IRS
- Apply subject matter expertise in analytics, data science, machine learning and artificial intelligence to improve data-driven decisions throughout OLS and across the IRS.
- Work with product managers, business owners, and delivery partners to empower them with valuable analytics, fit for purpose, and operationalized following best practice and data governance

(3) The Functional Chief of the User Experience Analytics unit reports to the Director of the User Experience Services.branch

1.1.29.5.2
(02-15-2024)
User Experience Branch

(1) User Experience Research branch is responsible for user research and usability testing to inform effective, human-centered design solutions across the IRS digital services portfolio.

(2) **Sections:**

- Research Strategy
- Experience Modeling

(3) **Responsibilities:**

- Apply qualitative and quantitative research methods to understand the behaviors, needs and expectations of users interacting across IRS digital service channels
- Conduct iterative usability testing at all levels of fidelity to ensure that design solutions are validated and aligned with user needs throughout the product delivery lifecycle
- Provide synthesized, actionable insights and recommendations to inform product enhancements and priorities

- Manage the User Experience Survey Program to collect, analyze and communicate data related to customer satisfaction and experience across IRS digital service channels

(4) The Functional Chief of the User Experience Research branch reports to the Director of the User Experience Services unit.

1.1.29.5.3
(02-15-2024)
Design Branch

(1) User Experience Design branch is responsible for delivery of effective, consistent, user-centered design solutions across the IRS digital services portfolio.

(2) **Sections:**

- UI Design
- Design Standards

(3) **Responsibilities:**

- Manage IRS Online Design Guide (ODG) standards to ensure accessible,
- Ensure consistent interface and interaction design across IRS websites and digital products
- Align with broader IRS brand guidelines
- Produces design solutions for IRS websites and digital services and products informed by user research and analytics
- Follows best practices to ensure IRS digital services are inclusive and accessible to meet the needs of all taxpayers in their digital interactions with the IRS

(4) The Functional Chief of the User Experience Design branch reports to the Director, User Experience Services.

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Exhibit 1.1.29-1 (08-16-2018)**Online Services Organizational Chart**

