



# Internal Revenue Service

## Affirmative Action Plan for the Recruitment, Hiring, Advancement, and Retention of Persons with Disabilities



Fiscal Year  
2023

## Affirmative Action Plan for the Recruitment, Hiring, Advancement, and Retention of Persons with Disabilities

To capture agencies' affirmative action plan for persons with disabilities (PWD) and persons with targeted disabilities (PWTD), EEOC regulations (29 C.F.R. § 1614.203(e)) and MD-715 require agencies to describe how their affirmative action plan will improve the recruitment, hiring, advancement, and retention of applicants and employees with disabilities.

### Section I: Efforts to Reach Regulatory Goals

*EEOC regulations (29 CFR §1614.203(d)(7)) require agencies to establish specific numerical goals for increasing the participation of persons with disabilities and persons with targeted disabilities in the federal government*

1. Using the goal of 12% as the benchmark, does your agency have a trigger involving PWD by grade level cluster in the permanent workforce? If "yes", describe the trigger(s) in the text box.

- a. Cluster GS-1 to GS-10 (PWD) Answer No
- b. Cluster GS-11 to SES (PWD) Answer No

• The PWD participation rate (13.62%) exceeded the 12% benchmark for the grade cluster GS-1 to GS-10 so it is not a trigger. • The PWD participation rate ( 13.97%) exceeded the 12% benchmark for the grade cluster GS-11 to SES so it is not a trigger.

\*For GS employees, please use two clusters: GS-1 to GS-10 and GS-11 to SES, as set forth in 29 C.F.R. § 1614.203(d)(7). For all other pay plans, please use the approximate grade clusters that are above or below GS-11 Step 1 in the Washington, DC metropolitan region.

2. Using the goal of 2% as the benchmark, does your agency have a trigger involving PWTD by grade level cluster in the permanent workforce? If "yes", describe the trigger(s) in the text box.

- a. Cluster GS-1 to GS-10 (PWTD) Answer No
- b. Cluster GS-11 to SES (PWTD) Answer No

• The PWTD participation rate (3.44%) exceeded the 2% benchmark for the grade cluster GS-1 to GS-10 so it is not a trigger. • The PWTD participation rate (2.79%) exceeded the 2% benchmark for the grade cluster GS-11 to SES so it is not a trigger.

Grade Level Cluster(GS or Alternate Pay Planb)	Total	Reportable Disability		Targeted Disability	
	#	#	%	#	%
Numarical Goal	--	12%		2%	
Grades GS-11 to SES	36220	5061	13.97	1012	2.79
Grades GS-1 to GS-10	51321	6989	13.62	1768	3.44

3. Describe how the agency has communicated the numerical goals to the hiring managers and/or recruiters.

The Internal Revenue Service (IRS) continues to uphold its commitment to being a model employer by ensuring participation of people with disabilities in the workforce aligns with the numerical goals as established by the Equal Employment Opportunity Commission (EEOC). During FY 2023, the IRS continued to share hiring summaries on a biweekly basis with the Veteran Employment and Schedule A coordinators within each business unit for dissemination throughout the IRS. Additionally, the numerical goals were briefed to senior leadership and front-line managers during annual commitment meetings. Some of the following activities demonstrate our efforts to further improve the recruitment, hiring, advancement, and retention of applicants and

employees with disabilities: Managers are required to take annual training delivered by the internal Integrated Talent Management (ITM) training modules, which include a large range of topics that cover a broad scope of disability protocol, noncompetitive hiring authority regulations and the processing of reasonable accommodation requests; Training on the Schedule A hiring authority was provided by the IRS Policy and Execution office in November of 2022; The Human Capital Office (HCO) stood up a new Special Emphasis Program Branch which falls under the Strategic Talent Analytics and Recruitment Solutions (STARS) Department was stood up in 2022 and has 15 Recruiter and HR Specialist allocations dedicated to hiring Veterans, Disabled Veterans, Person with Disabilities (PWD), and Persons with Targeted Disabilities (PWTD).

## Section II: Model Disability Program

Pursuant to 29 C.F.R. § 1614.203(d)(1), agencies must ensure sufficient staff, training and resources to recruit and hire persons with disabilities and persons with targeted disabilities, administer the reasonable accommodation program and special emphasis program, and oversee any other disability hiring and advancement program the agency has in place.

### A. PLAN TO PROVIDE SUFFICIENT & COMPETENT STAFFING FOR THE DISABILITY PROGRAM

1. Has the agency designated sufficient qualified personnel to implement its disability program during the reporting period? If “no”, describe the agency’s plan to improve the staffing for the upcoming year.

Answer No

See MD-715, Part H. B.4

2. Identify all staff responsible for implementing the agency's disability employment program by the office, staff employment status, and responsible official.

Disability Program Task	# of FTE Staff By Employment Status			Responsible Official (Name, Title, Office Email)
	Full Time	Part Time	Collateral Duty	

3. Has the agency provided disability program staff with sufficient training to carry out their responsibilities during the reporting period? If “yes”, describe the training that disability program staff have received. If “no”, describe the training planned for the upcoming year.

Answer Yes

The IRS continues to regularly provide its disability program staff with the most up to date training available to ensure superior performance and service to its customers. All newly hired Reasonable Accommodation Coordinators (RACs) are required to complete a comprehensive curriculum of RA training and receive "On the Job Instruction (OJI)" to successfully perform their duties. In FY 2023, the RACs attended a three-day Continuing Professional Education (CPE) in-depth training event and received briefings throughout the year on significant case decisions to further inform their activities. Furthermore, the IRS Integrated Talent Management (ITM) training system, provides ongoing access for self- covering a broad scope of disability protocol, non-competitive hiring authority regulations, and case processing. Training was also provided on the Schedule A Hiring Authority on November 9, 2022.

### B. PLAN TO ENSURE SUFFICIENT FUNDING FOR THE DISABILITY PROGRAM

Has the agency provided sufficient funding and other resources to successfully implement the disability program during the reporting period? If “no”, describe the agency’s plan to ensure all aspects of the disability program have sufficient funding and other resources.

Answer No

Equity, Diversity and Inclusion's (EDI) Disability Services Division hired 10 Reasonable Accommodation Coordinators (RACs) to

augment its current resources in response to a deluge of RA requests made in connection with the Service's evolving approach to accomplishing its mission in the pandemic environment including where work is performed. EDI's Request for organizational change to create a fourth Reasonable Accommodation Team was approved and EDI is now in the process of establishing Territory Manager and Senior RAC positions to manage the additional RACs. The additional staffing is expected to contribute to significant reductions in RA case inventories and ultimately to reduced processing times. As of September 29, 2023, the number of RA cases in inventory has decreased by 22.32% from 3,086 to 2,397 cases respectively. The IRS will assess to what extent additional staffing is needed to address the current RA workload as well as the expected increase in demand for services due to the IRS's plans to hire significant numbers of employees in the coming months and years.

### Section III: Program Deficiencies In The Disability Program

<b>Brief Description of Program Deficiency</b>	B.4.a.4. to provide all supervisors and employees with training on the EEO program, including but not limited to retaliation, harassment, religious accommodations, disability accommodations, the EEO complaint process, and ADR? [see MD-715, II(B) and III(C)] If not, please identify the type(s) of training with insufficient funding in the comments column.
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<b>Brief Description of Program Deficiency</b>	B.4.a.8. to effectively administer its special emphasis programs (such as, Federal Women's Program, Hispanic Employment Program, and People with Disabilities Program Manager)? [5 USC § 7201; 38 USC § 4214; 5 CFR § 720.204; 5 CFR § 213.3102(t) and (u); 5 CFR § 315.709]
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<b>Brief Description of Program Deficiency</b>	C.2.b.5. Does the agency process all initial accommodation requests, excluding ongoing interpretative services, within the time frame set forth in its reasonable accommodation procedures? [see MD-715, II(C)] If “no”, please provide the percentage of timely-processed requests, excluding ongoing interpretative services, in the comments column.
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<b>Objective</b>	The Agency will take steps to re-examine the current Reasonable Accommodation procedures and establish appropriate metrics to ensure accurate timeframes are in place in an effort to improve the agency’s timely processing of reasonable accommodation cases.	
<b>Target Date</b>	Sep 30, 2019	
<b>Completion Date</b>	Dec 31, 2021	
<b>Planned Activities</b>	<u>Target Date</u>	<u>Completion Date</u> <u>Planned Activity</u>
<b>Accomplishments</b>	<u>Fiscal Year</u>	<u>Accomplishment</u>
	2019	The Reasonable Accommodation Coordinators are making more effective and consistent use of applicable suspense codes in the reasonable accommodations request tracking systems (ALERTS). As a result of more accurate tracking and case handling enhancements, the IRS has experienced slight increases this fiscal year in the number of requests for accommodation resolved within 30 days of the original request.
	2022	On June 11, 2021, the Service published updated reasonable accommodation procedures which in part, changed the processing timeframe from 15 to 20 workdays. This change brought the IRS’s timeframe in line with that of the Department of the Treasury and is less likely to create unrealistic expectations in light of the complex nature of many reasonable accommodation requests. In 2021, the IRS concluded a Lean Six Sigma (LSS) assessment of its reasonable accommodation process that began in February of 2020. Following data gathering, including eliciting input from all Business Units, the LSS team identified several process modifications which were socialized with all Business Units and implemented. The process modifications pertained to expediting accommodation request assessment and approval/denial, as well as fulfillment of accommodation needs involving adaptive technology or furniture and workspace modifications. Preliminary data suggests the modifications are yielding beneficial results as the average processing time in Fiscal Year 2020 was 89 workdays, 58 workdays in FY21 and 45 workdays FY22, Year to Date. It is, however, also important to note that the reasonable accommodation process is neither a static nor closed system. While previously the Service could be expected to address less than 1,000 requests for accommodation annually, beginning in the autumn of 2021 following the issuance of Executive Order 14043, the IRS received more than 6,700 requests for accommodation based either on medical needs or reported religious beliefs. The IRS has also made a variety of policy and program changes that have prompted a substantial number of accommodation requests, including, completing a phased return to the office for all employees. The unprecedented RA inventory levels, coupled with addressing novel issues such as those pertaining to balancing individual medical concerns with the risk of the spread of disease and balancing respect for religious beliefs with the need to carry out the Service’s mission have strained resources. While the data suggest the IRS has made progress towards the goal, the Service remains committed to further exploring opportunities to expedite RA request processing. Some of those opportunities include, exploring adding staff or contract support personnel to facilitate the interactive dialogue between employees or applicants for employment with disabilities and IRS management, as well as navigating the various support functions involved with assessing and fulfilling many accommodation needs.

<i>Fiscal Year</i>	<i>Accomplishment</i>
2020	<p>The IRS updated its reasonable accommodation procedures, making editorial changes such as adding program control information, fixing/eliminating broken hyperlinks, changing office names and contact information etc. These changes did not alter the timeframe for processing accommodation requests. The IRS’s contract with the union representing Bargaining Unit employees prescribes a 15-day period for implementing reasonable accommodations. The IRS also generally has an obligation to bargain with the union concerning implementation of changes to processes that impact Bargaining Unit employees. The Service must remain cognizant of its Labor obligations when modifying the timeframe(s) or making other changes to reasonable accommodation processes. The IRS is undertaking a review and analysis of its reasonable accommodation decision making and fulfillment processes to identify opportunities for enhancing efficiency and effectiveness. In February 2020 the IRS began a Lean Six Sigma evaluation of its RA processes. In July 2020 the LSS team concluded the data gathering phase of the study. In order to better position the LSS team to analyze the data and formulate recommended changes to processes best calculated to increase efficiency in the fulfillment of reasonable accommodation needs the IRS moved to include senior subject matter experts from the Facilities Management &amp; Security Services as well as Information Technology functions in the LSS effort. The LSS team expects to present its findings and recommendations for changes to processes in early Fiscal Year 2021. Those recommendations will need to be vetted with partner support functions and might necessitate either contract or impact bargaining with the union before implementation.</p>
2021	<p>The IRS continued a Lean Six Sigma evaluation of its RA processes. The LSS team identified and implemented quick hits with all Business Units. Preliminary data suggests that the quick-hits are yielding beneficial results, including a 47% decrease in cycle time. On June 11, 2021, the Service published updated reasonable accommodation procedures. Editorial changes were made for clarity and accuracy, including updating titles, website addresses, and legal and other references. The updates clarified:</p> <ul style="list-style-type: none"> <li>• If an accommodation can be provided in less than the maximum amount of time permitted, then it must be provided as soon as possible. Failure to do so might result in a finding that the agency violated applicable law.</li> <li>• The agency will not be expected to adhere to its usual timelines if an individual’s health professional fails to provide needed documentation in a timely manner; moreover, the status of a pending request may be ascertained by contacting the servicing Reasonable Accommodation Coordinator.</li> <li>• Changed the processing timeframe from 15 to 20 workdays and clarified that the processing timeframe is not tolled while a determination is made as to whether medical documentation is needed.</li> <li>• Eliminated a provision authorizing a Deciding Official up to five days to provide written notice of a denial decision.</li> </ul>

<i>Fiscal Year</i>	<i>Accomplishment</i>
2023	<p>Over the last two years, IRS' Office of Equity, Diversity, and Inclusion (EDI) has experienced an increase in program caseload while facing increasing attrition, directly impacting the ability for the Service to successfully implement the full scope of EDIA program responsibilities. Specifically, the Reasonable Accommodation Coordinators (RAC) staff shortage has contributed to the untimely processing of RA cases. IRS hired 10 RACs in response to a deluge of RA requests made in connection with the pandemic environment. Additional staffing is expected to contribute to significant reductions in RA case inventories and ultimately to reduced processing times. Since June 12, 2023, the number of RA cases in inventory has decreased by nearly 10% from 3,086 to 2,782 as of August 18, 2023. IRS will assess to what extent additional staffing is needed to address its workload as well as an expected increase in demand for services due to the IRS's plans to hire a significant number of employees in the coming months and years. IRS is also adjusting processes to increase efficiency and reduce the amount of time needed to fully address accommodation needs and afford effective accommodations for employees/applicants with disabilities. Further, IRS is targeting its education and outreach efforts to its managers, to include an emphasis on the need to promptly make decisions and furnish either interim or more long-term accommodations, as well as the importance of managers to exhibit grace, empathy and flexibility when responding to accommodation requests. IRS' EDI and HCO are collaborating to deliver an all-manager CPE targeted for the 1st quarter of Fiscal Year 2024.</p>

## Section IV: Plan to Recruit and Hire Individuals with Disabilities

Pursuant to 29 C.F.R. §1614.203(d)(1)(i) and (ii), agencies must establish a plan to increase the recruitment and hiring of individuals with disabilities. The questions below are designed to identify outcomes of the agency's recruitment program plan for PWD and PWTD

### A. PLAN TO IDENTIFY JOB APPLICATIONS WITH DISABILITIES

1. Describe the programs and resources the agency uses to identify job applicants with disabilities, including individuals with targeted disabilities.

The IRS continues to promote the improvement of recruitment, hiring, retention and advancement of individuals with disabilities in the federal workforce. The USAJOBS Agency Talent Portal is used to recruit individuals with disabilities for jobs and to promote IRS careers and participation. All applications to IRS vacancy announcements allow candidates to self-identify disabilities, although this is not a requirement for applicants to complete. Additionally, a repository announcement was re-posted to USAJobs in October 2022 to collect resumes from potential job seekers who may have eligibility for the Schedule A Hiring Authority (fiscal year to date, there re over 13,000 applicants). This repository is used to allow managers the ability to submit requests for resumes of those eligible for the Schedule A hiring authority. The repository is reposted in October of each new fiscal year. In FY 23, the Strategic Talent Analytics & Recruitment Solutions (STARS) Office continued to maintain its commitment to attract and retain qualified, diverse candidates to reflect the population we serve. During this time, the IRS conducted a total of 103 recruitment events, 29 onsite Direct Hiring Authority (DHA) events, 46 Schedule A Recruitment Events and 2 Ability Virtual Job Fairs. The IRS conducted an in-person workshop titled "Providing Reasonable Accommodation for Qualified Individuals with Disabilities" at the 2023 Deaf In Government (DIG) National Training Conference held at American University, School of Law in June 2023 (45 attendees). The theme for the conference was "Advancement Through Accessibility" and built upon Executive Order 14035: Diversity, Equity, Inclusion and Accessibility (DEIA) in the Federal Workforce. The overarching goal for the event was to build a bridge within the government using the "A" in DEIA by collaborating with agencies to support Deaf, Deaf/Blind, and Hard of Hearing employees throughout all levels of government. Due to medical requirements for law enforcement positions in the Criminal Investigations Division, the IRS Specialty Hiring Team focused on enhancing internships and the hiring of transitioning military members, veterans, PWD, and PWTD. The IRS continues to assess risks and potential liabilities in the disability area for Special Agents to ensure that all leaders, managers, and employees working in this job series (1811) are aware that applicants can be individuals with a disability and request a reasonable accommodation to meet both the qualifications for the job and the required medical standards required as a law enforcement official.



2. Pursuant to 29 C.F.R. §1614.203(a)(3), describe the agency’s use of hiring authorities that take disability into account (e.g., Schedule A) to recruit PWD and PWTD for positions in the permanent workforce

The IRS uses the Schedule A Hiring Authority and the 30% or more Disabled Veteran Hiring Authority to recruit and hire persons with disabilities. The Human Capital Office (HCO) takes disability into account (e.g., Schedule A) to recruit PWD and PWTD for positions in the permanent workforce. In response to an expected hiring surge, the IRS hired 11,293 employees under the Direct Hiring Authority DHA with an additional 3,823 new hires pending the onboarding process. These recruitment efforts targeted 127 Pathway candidates and 36 Schedule A candidates who qualified under special hiring authorities. The Special Emphasis Program Branch of the Strategic Talent Analytics and Recruitment Solutions (STARS) Department allocated 15 Recruiter and HR Specialist positions dedicated to hiring Persons with Disabilities (PWD) and Persons with Targeted Disabilities (PWTD). STARS manages the Veteran Program Office (VPO) who conducts monthly meetings with Veteran Employment Coordinators (VECs) from each Business Operating Division (BOD) in order keep all BODs engaged and informed on all veteran actions for IRS employees. This effort keeps all IRS Veterans informed on their benefits and upcoming actions that impacts them. The VPO also shares veterans recurring events with all BODs in an effort to meet their hiring needs as demonstrated by the hiring of 773 Veterans, 1,297 People with Disabilities, and 31 Military Spouses thus far in FY23. When management elects to fill a vacancy using non-competitive procedures, STARS provides them with qualified applicants from the repository in USAJobs. Documentation of the applicant's disability is required for appointments of person(s) with disabilities of intellectual, psychiatric, and severe physical disabilities and the Schedule A Certification must contain an official organizational letterhead, reference to 5 CFR 213 3129(u), and a physical signature of the signee. The IRS' recruitment strategy involves identifying best practices and looking for partnering opportunities within our business divisions during the recruitment process for both internal and external hires. The goal is to attract potential job candidates with culturally diverse backgrounds that reflects the taxpayers we service. The IRS holds monthly Human Capital Board meetings and participates in recurring meetings with the embedded Director of Human Capital Resources and the Language Service Executive Advisory Council (LSEAC) to address any identified impediments related to EDI. The IRS supports hiring by using non-competitive hiring authorities to identify and hire persons with disabilities. The broadest authority, Schedule A is open to all potential candidates who meet eligibility requirements. The IRS also identifies and hires eligible veterans using authorities addressing military service-connected disabilities - the 30% or More Disabled Veteran and the Veteran Recruitment Appointment authorities.

3. When individuals apply for a position under a hiring authority that takes disability into account (e.g., Schedule A), explain how the agency (1) determines if the individual is eligible for appointment under such authority; and, (2) forwards the individual's application to the relevant hiring officials with an explanation of how and when the individual may be appointed.

When management elects to fill a vacancy using non-competitive procedures, STARS provides them with qualified applicants from the repository in USAJobs. Documentation of an applicant's disability is required for appointments of person(s) with disabilities of intellectual, psychiatric, and severe physical disabilities. Schedule A Certification must contain the following: an official organizational letterhead, reference to 5 CFR 213 3129(u), and a physical signature of the signee. HCO determines if the individual is eligible for appointment under such authority and forwards the individual's application to the relevant hiring officials with an explanation of how and when the individual may be appointed. Managers may request resumes from persons with disabilities from the IRS Schedule A resume repository, the 30% or More Disabled Veteran resume repository, or from a focused recruitment effort. HR will qualify promising resumes submitted for review via a hiring request through USA Staffing. HR will send back to the hiring manager resumes of qualified applicants for review and potential selection.

4. Has the agency provided training to all hiring managers on the use of hiring authorities that take disability into account (e.g., Schedule A)? If “yes”, describe the type(s) of training and frequency. If “no”, describe the agency’s plan to provide this training.

Answer Yes

Schedule A Employment Coordinators are invited to monthly planning meetings led by STARS and Schedule A Program Managers who provide training covering selection procedures and agency goals on hiring Schedule A, PWTD, and PWD applicants. Schedule A Employment Coordinators are encouraged to collaborate with the hiring managers on leveraging the Schedule A Hiring Authority to fill agency vacancies. The training covers legal use of the hiring authority, required documentation, how candidates are referred, and onboarding of these candidates. The IRS has a Veterans Outreach Plan that reminds staff of the need to continue to fully commit to the IRS hiring initiative to ensure that qualified veterans have employment opportunities when they transition to civilian

life. The outreach planned activities are designed to educate about the recruitment, hiring and retention of veterans (including disabled veterans) in our workforce. Hiring managers and analysts completed annual training for hiring veterans in Q3 and Q4, which included specific information on the non-competitive authorities available and the processes to hire disabled veterans. Hiring managers receive additional information about hiring persons with disabilities in the managerial curriculum. The IRS also presented information about Schedule A and Veteran Hiring Authorities to executives. The presentations emphasized the benefits of hiring persons with disabilities and veterans, while encouraging them to use Schedule A and Veteran hiring paths when announcing positions on USAJobs for competitive announcements or USAStaffing for non-competitive recruiting.

**B. PLAN TO ESTABLISH CONTACTS WITH DISABILITY EMPLOYMENT ORGANIZATIONS**

Describe the agency’s efforts to establish and maintain contacts with organizations that assist PWD, including PWTD, in securing and maintaining employment.

The IRS partners with the Workforce Recruitment Program (WRP) to locate candidates and post IRS vacancy announcements. The IRS also participates in the WRP's informational interviews for students with disabilities to provide them with career advice and opportunities for Federal employment. In partnership with AbilityJobs.com, the IRS hosts virtual hiring events for PWD as well as monthly Schedule A virtual information sessions with job seekers to assist with barriers they may encounter when entering the federal workforce. The IRS works closely with the leadership of the Council of State Administrators for Vocational Rehabilitation, and by extension, with the counselors who support local partners in states where IRS offices are located. The IRS also works with the National Industries for the Blind, SourceAmerica and other agencies to promote employment opportunities. Our points of contact encompass all 50 states including Washington, DC, and the territories and include over 710 rehabilitation services and agencies that include underserved populations. The IRS works closely with counselors from the Veteran Readiness and Employment program in the Department of Veterans Affairs and has an established partnership with other veteran service organizations such as the Paralyzed Veterans of America. As part of the initiative to gather the best practices from other federal agencies, the IRS participates in the quarterly Equal Employment Opportunity Commission Federal Exchange on Employment and Disability (FEED), Human Capital Board and Language Service Executive Advisory Council (LSEAC) meetings to discuss and address any identified impediments related to EDI. The IRS also prepares internal articles for EEO related issues, EDIA topics, work/life issues and special observance such as Hispanic Heritage Month, Black History Month, Women's History Month, Autism Acceptance Month, AANHPI Heritage Month, Pride Month and National Wellness Month. The IRS has active membership with the nationwide employee organization - "Deaf in Government" and internally participates in the agency's IRS-DEAF Empowerment Advocacy Forum. Internally, the Local Accessibility Coordinator (LAC) program continues to serve as a vital resource to ensure employees with disabilities receive or have the same access to services, programs, technology, electronic information, facilities and are included in activities and developmental opportunities as provided to those without disabilities.

**C. PROGRESSION TOWARDS GOALS (RECRUITMENT AND HIRING)**

1. Using the goals of 12% for PWD and 2% for PWTD as the benchmarks, do triggers exist for PWD and/or PWTD among the new hires in the permanent workforce? If “yes”, please describe the triggers below.

- a. New Hires for Permanent Workforce (PWD) Answer Yes
- b. New Hires for Permanent Workforce (PWTD) Answer Yes

• The PWD new hires rate (11.33%) was less than the 12% benchmark so it is a trigger. • The PWTD new hires rate (1.87%) was less than the 2% benchmark so it is a trigger.

New Hires	Total (#)	Reportable Disability		Targeted Disability	
		Permanent Workforce (%)	Temporary Workforce (%)	Permanent Workforce (%)	Temporary Workforce (%)
% of Total Applicants	0				
% of Qualified Applicants	0				

% of New Hires	0			
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2. Using the qualified applicant pool as the benchmark, do triggers exist for PWD and/or PWTD among the new hires for any of the mission- critical occupations (MCO)? If “yes”, please describe the triggers below. Select “n/a” if the applicant data is not available for your agency, and describe your plan to provide the data in the text box.

- a. New Hires for MCO (PWD) Answer N/A
- b. New Hires for MCO (PWTD) Answer N/A

Treasury and the bureaus do not have accurate Applicant Flow data required to submit a response to this question. Given Treasury's commitment to provide accurate and reliable data, based on the challenges identified in the Executive Summary, Treasury made the decision to exclude Applicant Flow data from the FY 2023 submission. OCRE is hopeful that efforts made in FY 2024 will provide Treasury the opportunity to submit accurate Applicant Flow data and Part J responses for the FY 2024 report.

New Hires to Mission-Critical Occupations	Total (#)	Reportable Disability	Targetable Disability
		New Hires (%)	New Hires (%)
Numerical Goal	--	12%	2%

3. Using the relevant applicant pool as the benchmark, do triggers exist for PWD and/or PWTD among the qualified internal applicants for any of the mission-critical occupations (MCO)? If “yes”, please describe the triggers below. Select “n/a” if the applicant data is not available for your agency, and describe your plan to provide the data in the text box.

- a. Qualified Applicants for MCO (PWD) Answer N/A
- b. Qualified Applicants for MCO (PWTD) Answer N/A

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4. Using the qualified applicant pool as the benchmark, do triggers exist for PWD and/or PWTD among employees promoted to any of the mission- critical occupations (MCO)? If “yes”, please describe the triggers below. Select “n/a” if the applicant data is not available for your agency, and describe your plan to provide the data in the text box.

- a. Promotions for MCO (PWD) Answer N/A
- b. Promotions for MCO (PWTD) Answer N/A

Treasury and the bureaus do not have accurate Applicant Flow data required to submit a response to this question. Given Treasury's commitment to provide accurate and reliable data, based on the challenges identified in the Executive Summary, Treasury made the decision to exclude Applicant Flow data from the FY 2023 submission. OCRE is hopeful that efforts made in FY 2024 will provide Treasury the opportunity to submit accurate Applicant Flow data and Part J responses for the FY 2024 report.

## Section V: Plan to Ensure Advancement Opportunities for Employees with Disabilities

Pursuant to 29 C.F.R. §1614.203(d)(1)(iii), agencies are required to provide sufficient advancement opportunities for employees with disabilities. Such activities might include specialized training and mentoring programs, career development opportunities, awards programs, promotions, and similar programs that address advancement. In this section, agencies should identify, and provide data on programs designed to ensure advancement opportunities for employees with disabilities.

### A. ADVANCEMENT PROGRAM PLAN

Describe the agency’s plan to ensure PWD, including PWTD, have sufficient opportunities for advancement.

The IRS considers PWD/PWTD for advancement opportunities in various career developmental opportunities such as non-competitive details, promotions and internal merit promotions available to all employees agency wide. By proactively identifying barriers that could prohibit advancement of persons with disabilities, the IRS ensures sufficient opportunities for advancement exist. The Service adheres to established policies for advertising advancement opportunities as widely as possible and provides assistance to all employees in identifying and using tools and resources that will assist them in preparing for advancement opportunities in a fair and consistent manner. All IRS USA Job announcements contain language indicating the Federal hiring process is setup to be fair and transparent. Each announcement contains Equal Employment Opportunity guidance which states in part that the U.S. Government does not discriminate in employment on the basis of disability. The announcements also contain Reasonable Accommodation Policy guidance for applicants and employees. The IRS adheres to these policies to ensure PWD, including PWTD have sufficient opportunities for advancement. A link to the OPM.gov Policy, Data, Oversight -Disability Employment webpage is included in each announcement. All IRS employees are provided information on the IRS RA Policy to ensure PWD, including PWTD have sufficient opportunities for advancement. Adaptive equipment, services, training and maintenance that makes it possible for IRS employees with a qualified disability is granted to fulfill their job duties. For example, this reporting period a ramp for an employee with a qualified disability was constructed. In FY 23, due to an increase in RA requests for 100% remote work (permanent and temporary), proactive steps were taken to assist with the prompt processing of the requests. This included regular collaborations with management and HQ Disability Services Division, the implementation of a newly established internal RA Flow Charts for Managers outlining the RA process, and the implementation of an internal policy that included Human Capital Board (HCB) decisions on RA requests for 100% remote work (permanent or temporary) in providing efficient internal RA accommodations.

**B. CAREER DEVELOPMENT OPPORTUNITES**

1. Please describe the career development opportunities that the agency provides to its employees.

The IRS participates in the Leadership Succession Review to ensure all employees are prepared for leadership positions of increased scope of responsibility. Additionally, the IRS has agency-wide career development programs that support employee development in both technical and leadership competencies. Career development tools include but are not limited to: Details offered through the Service-wide Opportunity Listing website; Career Learning Plans (CLP) jointly developed by employees and their managers; Leadership Succession Review (LSR) process, which provides the opportunity for all employees interested in becoming managers to become actively involved with their development; Front Line Readiness Program (FLRP), designed to develop employees for front line manager positions; Senior Manager Readiness Program (SMRP), designed to develop competencies and skills necessary to prepare participants for Senior Manager (SM) positions; Executive Readiness (XR) Program, designed to identify and develop those interested in becoming an executive; SES Candidate Development Program (CDP), used to identify, develop, and select career Senior Executive Service (SES) members. In addition, IRS has mentoring and coaching programs available to those interested in improving their skills. Although the programs are not competitive, management approval is required. The IRS advertises career developmental opportunities such as the Mock Interview process, On-the-Job training (OJT) and Classroom Instructor Training (CIT) for Case Advocates and Technical Advisors. Help is available to employees who need assistance applying. Monthly Lunch & Learn sessions are held virtually as an effective way to communicate and educate employees on EEO policy, career development opportunities, and to emphasize the contributions of persons with disabilities. The IRS also has other programs to support career development for all employees in both technical and leadership competencies. Career development tools include, but are not limited to: 1. Detail assignment opportunities offered through the Service-wide Opportunity Listing website 2. Career Learning Plans (CLP) developed jointly by employees and their managers 3. Leading Leaders designed to develop competencies and skills necessary to prepare participants for Senior Manager (SM) positions

2. In the table below, please provide the data for career development opportunities that require competition and/or supervisory recommendation/ approval to participate.

Career Development Opportunities	Total Participants		PWD		PWTD	
	Applicants (#)	Selectees (#)	Applicants (%)	Selectees (%)	Applicants (%)	Selectees (%)
Mentoring Programs	na	1003	na	21.73%	na	4.19%
Other Career Development Programs		483		9.32%	na	2.48%

Career Development Opportunities	Total Participants		PWD		PWTD	
	Applicants (#)	Selectees (#)	Applicants (%)	Selectees (%)	Applicants (%)	Selectees (%)
Training Programs	na	na	na	na	na	na
Fellowship Programs	na	na	na	na	na	na
Internship Programs	na	118	na	28.81%	na	3.39%
Coaching Programs	na	222	na	10.36%	na	2.25%
Detail Programs	10850	435	2168	14.94%	433	3.22%

3. Do triggers exist for PWD among the applicants and/or selectees for any of the career development programs? (The appropriate benchmarks are the relevant applicant pool for the applicants and the applicant pool for selectees.) If “yes”, describe the trigger(s) in the text box. Select “n/a” if the applicant data is not available for your agency, and describe your plan to provide the data in the text box.

- a. Applicants (PWD) Answer No
- b. Selections (PWD) Answer Yes

Internship Programs: Applicant data is not available. There were 118 participants in various IRS Internship and Recent Grads programs; 34 (28.81%) were PWD which is above the 12% goal. Therefore, no trigger exists for selections in the Internship programs. However, we cannot determine whether triggers exist for applicants since data is not available on the entire applicant population. Mentoring Programs: Applicant data is not available. There were 1003 participants in the various IRS Mentoring programs that served as mentors or mentees; 218 (21.73%) were PWD, which is above the 12% goal. However, we cannot determine whether triggers exist for applicants since data is not available on the entire applicant population. Coaching Program: Applicant data is not available. There were 212 participants in the IRS Coaching program that served as coaches or were coached. Only 222 (10.36%) were PWD which is below the 12% goal. Although the percentage of participants with PWD is below the PWD goal, we cannot determine whether triggers exist for applicants since data is not available on the entire applicant population. Relevant Pool: Total Permanent Workforce - PWD: 13.63% Detail Opportunities Program: The Detail Opportunities Program had a Relevant Pool of 13.63%. There was a total of 10,850 applicants; 2168 (19.98%) were PWD. A total of 65 (14.94%) of the 435 selectees were PWD. Therefore, IRS does not have a trigger in applicants or selections in the Detail Opportunities Program. Relevant Pool: Total Permanent Workforce - Grade equivalent 11s through 15s -PWD: 13.84% Leadership Development Programs: Applicant data is not available. The Relevant Pool of grade equivalent 11 through 15 is 13.84%. The IRS had 483 total participants in all its leadership development programs combined. Of the 483, 45 (9.32%) participants were PWD. The Candidate Development Program (CDP) had a total of 30 participants; 4 (13.33%) participants were PWD. The Executive Readiness (XR) Program had a total of 60 participants; 8 (13.33%) participants were PWD. The Leading Leaders Readiness Course had a total of 79 participants; 8 (10.13%) participants were PWD. The Frontline Leader Readiness Program had a total of 314 participants; 25 (7.98%) participants were PWD. IRS has a trigger in its LLRC and FLRP competitive leadership development programs selections since the percentage was lower than the relevant pool.

4. Do triggers exist for PWTD among the applicants and/or selectees for any of the career development programs? (The appropriate benchmarks are the relevant applicant pool for the applicants and the applicant pool for selectees.) If “yes”, describe the trigger(s) in the text box. Select “n/a” if the applicant data is not available for your agency, and describe your plan to provide the data in the text box.

- a. Applicants (PWTD) Answer No
- b. Selections (PWTD) Answer Yes

Internship Programs: Applicant data is not available. There were 118 participants in various IRS Internship and Recent Grads programs; 4 (3.39%) were PWTD which is above the 2% goal. Therefore, no trigger exists for selections in the Internship programs. However, we cannot determine whether triggers exist for applicants since data is not available on the entire applicant population. Mentoring Programs: Applicant data is not available. There were 1003 participants in the various IRS Mentoring programs that served as mentors or mentees; 42 ( 4.19%) were PWTD, which is above the 2% goal. However, we cannot determine whether triggers exist for applicants since data is not available on the entire applicant population. Coaching Program: Applicant data is not available. There were 212 participants in the IRS Coaching program that served as coaches or were coached. Five (2.25%) were

PWTD which is slightly above the 2% goal. However, we cannot determine whether triggers exist for applicants since data is not available on the entire applicant population. Relevant Pool: Total Permanent Workforce- PWTD: 3.23% Detail Opportunities Program: The Relevant Pool of grade equivalent of the IRS permanent workforce for PWTD is 3.23%. There was a total of 10,850 applicants for the Detail Opportunities Program; 433 (3.99%) were PWTD. A total of 14 (3.22%) of the 435 selectees were PWTD. IRS does not have a trigger in either the applicants or selections of PWTD in the Detail Opportunities Program since the percentage for both applicants and selections are above the relevant pool. Relevant Pool: Total Permanent Workforce - Grade equivalent 11s through 15s - PWTD: 2.82% Leadership Development Programs: Applicant data is not available. The Relevant Pool of the permanent workforce grade equivalent 11 through 15 is 2.82%. The IRS had 483 total participants in its leadership development programs. Of the 483, 12 (2.48%) participants were PWTD. The Candidate Development Program (CDP) had a total of 30 participants; 2 (6.67%) participants were PWTD. The Executive Readiness (XR) Program had a total of 60 participants; 1 (1.67%) participant was PWTD. The Leading Leaders Readiness Course had a total of 79 participants; 1 (1.27%) participant was PWTD. The Frontline Leader Readiness Program had a total of 314 participants; 8 (2.55%) participants were PWTD. IRS has a trigger in its XR and LLRC leadership development program selections since the percentage was lower than the relevant pool. Information on the triggers found in the XR and LLRC leadership development programs for PWD will be shared with IRS leadership and the Barrier Analysis Working Group Lead.

**C. AWARDS**

1. Using the inclusion rate as the benchmark, does your agency have a trigger involving PWD and/or PWTD for any level of the time-off awards, bonuses, or other incentives? If “yes”, please describe the trigger(s) in the text box.
  - a. Awards, Bonuses, & Incentives (PWD) Answer Yes
  - b. Awards, Bonuses, & Incentives (PWTD) Answer Yes

Total Time-Off Awards 1-10 Hours: • The inclusion rate for PWD (9.03%) was less than the no disability inclusion rate (10.66%) so there is a trigger. • The inclusion rate for PWTD (9.85%) was less than then the no disability inclusion rate (10.66%) so there is a trigger. • Total Time-Off Awards 11-20 Hours: The inclusion rate for PWD (7.68%) was less than then the no disability inclusion rate (9.25%) so there is a trigger. The inclusion rate for PWTD (8.56%) was less than then the no disability inclusion was less than then the no disability inclusion rate (9.25%) so there is a trigger. • Total Time-Off Awards 21-30 Hours: The inclusion rate for PWD (5.06%) was less than then the no disability inclusion rate (5.78%) so there is a trigger. The inclusion rate for PWTD (5.32%) was less than then the no disability inclusion rate (5.78%) so there is a trigger. • Total Time-Off Awards 31-40 Hours: The inclusion rate for PWD (15.89%) was less than then the no disability inclusion rate (17.27%) so there is a trigger. The inclusion rate for PWTD (19.13%) was greater than then the no disability inclusion rate (17.27%) so there is not a trigger. • Total Cash Awards \$500 Under: The inclusion rate for PWD (13.96%) was less than the no disability inclusion rate (15.66%) so there is a trigger. The inclusion rate for PWTD (16.79%) was greater than then the no disability inclusion rate (15.66%) so there is not a trigger. • Total Cash Awards between \$501 and \$999: The inclusion rate for PWD (12.47%) was less than then the no disability inclusion rate (14.85%) so there is a trigger. The inclusion rate for PWTD (14.53%) was less than then the no disability inclusion rate (14.85%) so there is a trigger. • Total Cash Awards between \$1000 and \$1999: The inclusion rate for PWD (20.04%) was less than then the no disability inclusion rate (22.47%) so there is a trigger. The inclusion rate for PWTD (23.55%) was greater than then the no disability inclusion rate (22.47%) so there is not a trigger. • Total Cash Awards between \$2000 and \$2999: The inclusion rate for PWD (8.39%) was less than then the no disability inclusion rate (10.77%) so there is a trigger. The inclusion rate for PWTD (8.77%) was less than then the no disability inclusion rate (10.77%) so there is a trigger. • Total Cash Awards between \$3000 and \$3999: The inclusion rate for PWD (8.45%) was less than then the no disability inclusion rate (11.96%) so there is a trigger. The inclusion rate for PWTD (9.92%) was less than then the no disability inclusion rate (11.96%) so there is a trigger. • Total Cash Awards between \$4000 and \$4999: The inclusion rate for PWD (1.01 %) was less than then the no disability inclusion rate (1.80%) so there is a trigger. The inclusion rate for PWTD (0.93%) was less than then the no disability inclusion rate (1.80%) so there is a trigger. • Total Cash Awards greater than \$5000: The inclusion rate for PWD (0.57%) was less than then the no disability inclusion rate (1.52%) so there is a trigger. The inclusion rate for PWTD (0.68%) was less than then the no disability inclusion rate (1.52%) so there is a trigger.

Time-Off Awards	Total (#)	Reportable Disability %	Without Reportable Disability %	Targeted Disability %	Without Targeted Disability %
Time-Off Awards 1 - 10 hours: Awards Given	8527	9.03	10.66	9.85	8.79
Time-Off Awards 1 - 10 Hours: Total Hours	60866	64.91	75.92	69.62	63.50

Time-Off Awards	Total (#)	Reportable Disability %	Without Reportable Disability %	Targeted Disability %	Without Targeted Disability %
Time-Off Awards 1 - 10 Hours: Average Hours	7.14	0.06	0.01	0.25	0.00
Time-Off Awards 11 - 20 hours: Awards Given	7387	7.68	9.25	8.56	7.42
Time-Off Awards 11 - 20 Hours: Total Hours	117717	122.05	147.40	134.56	118.30
Time-Off Awards 11 - 20 Hours: Average Hours	15.94	0.13	0.02	0.57	0.00
Time-Off Awards 21 - 30 hours: Awards Given	4649	5.06	5.78	5.32	4.98
Time-Off Awards 21 - 30 Hours: Total Hours	117289	127.12	145.89	134.23	124.99
Time-Off Awards 21 - 30 Hours: Average Hours	25.23	0.21	0.04	0.91	0.00
Time-Off Awards 31 - 40 hours: Awards Given	14007	15.89	17.27	19.13	14.91
Time-Off Awards 31 - 40 Hours: Total Hours	550856	624.05	679.09	751.71	585.77
Time-Off Awards 31 - 40 Hours: Average Hours	39.33	0.33	0.06	1.41	0.00
Time-Off Awards 41 or more Hours: Awards Given	0	0.00	0.00	0.00	0.00
Time-Off Awards 41 or more Hours: Total Hours	0	0.00	0.00	0.00	0.00
Time-Off Awards 41 or more Hours: Average Hours	0	0.00	0.00	0.00	0.00

Cash Awards	Total (#)	Reportable Disability %	Without Reportable Disability %	Targeted Disability %	Without Targeted Disability %
Cash Awards: \$501 - \$999: Awards Given	11874	12.47	14.85	14.53	11.85
Cash Awards: \$501 - \$999: Total Amount	8862209	9401.68	11064.84	11017.15	8917.20
Cash Awards: \$501 - \$999: Average Amount	746.35	6.26	1.09	27.27	-0.05
Cash Awards: \$1000 - \$1999: Awards Given	18081	20.04	22.47	23.55	18.99
Cash Awards: \$1000 - \$1999: Total Amount	25268499	27850.64	31427.93	32718.77	26390.67
Cash Awards: \$1000 - \$1999: Average Amount	1397.52	11.53	2.05	49.95	0.00
Cash Awards: \$2000 - \$2999: Awards Given	8501	8.39	10.77	8.77	8.27
Cash Awards: \$2000 - \$2999: Total Amount	20667110	20494.16	26160.74	21514.17	20188.26
Cash Awards: \$2000 - \$2999: Average Amount	2431.14	20.27	3.55	88.17	-0.09
Cash Awards: \$3000 - \$3999: Awards Given	9319	8.45	11.96	9.92	8.00
Cash Awards: \$3000 - \$3999: Total Amount	31013515	28092.11	39800.20	33004.17	26618.97
Cash Awards: \$3000 - \$3999: Average Amount	3327.99	27.60	4.87	119.58	0.01
Cash Awards: \$4000 - \$4999: Awards Given	1365	1.01	1.80	0.93	1.04
Cash Awards: \$4000 - \$4999: Total Amount	6106385	4468.43	8049.87	4137.00	4567.82

Cash Awards	Total (#)	Reportable Disability %	Without Reportable Disability %	Targeted Disability %	Without Targeted Disability %
Cash Awards: \$4000 - \$4999: Average Amount	4473.54	36.63	6.56	159.12	-0.11
Cash Awards: \$5000 or more: Awards Given	1119	0.57	1.52	0.68	0.54
Cash Awards: \$5000 or more: Total Amount	6876451	3473.14	9377.18	4123.80	3278.00
Cash Awards: \$5000 or more: Average Amount	6145.18	50.34	9.00	217.04	0.34

2. Using the inclusion rate as the benchmark, does your agency have a trigger involving PWD and/or PWTD for quality step increases or performance- based pay increases? If “yes”, please describe the trigger(s) in the text box.

a. Pay Increases (PWD) Answer Yes

b. Pay Increases (PWTD) Answer Yes

The inclusion rate for PWD (3.28%) was less than then the no disability inclusion rate (3.85%) so there is a trigger. • The inclusion rate for PWTD (3.63%) was less than the no disability inclusion rate (3.85%) so there is a trigger.

Other Awards	Total (#)	Reportable Disability %	Without Reportable Disability %	Targeted Disability %	Without Targeted Disability %
Total Performance Based Pay Increases Awarded	0	0.00	0.00	0.00	0.00

3. If the agency has other types of employee recognition programs, are PWD and/or PWTD recognized disproportionately less than employees without disabilities? (The appropriate benchmark is the inclusion rate.) If “yes”, describe the employee recognition program and relevant data in the text box.

a. Other Types of Recognition (PWD) Answer N/A

b. Other Types of Recognition (PWTD) Answer N/A

Not Applicable

**D. PROMOTIONS**

1. Does your agency have a trigger involving PWD among the qualified internal applicants and/or selectees for promotions to the senior grade levels? (The appropriate benchmarks are the relevant applicant pool for qualified internal applicants and the qualified applicant pool for selectees.) For non-GS pay plans, please use the approximate senior grade levels. If “yes”, describe the trigger(s) in the text box. Select “n/a” if the applicant data is not available for your agency, and describe your plan to provide the data in the text box.

a. SES

i. Qualified Internal Applicants (PWD) Answer N/A

ii. Internal Selections (PWD) Answer N/A

b. Grade GS-15

i. Qualified Internal Applicants (PWD) Answer N/A

ii. Internal Selections (PWD) Answer N/A

c. Grade GS-14

i. Qualified Internal Applicants (PWD) Answer N/A



- ii. Internal Selections (PWD) Answer N/A
- d. Grade GS-13
  - i. Qualified Internal Applicants (PWD) Answer N/A
  - ii. Internal Selections (PWD) Answer N/A

Treasury and the bureaus do not have accurate Applicant Flow data required to submit a response to this question. Given Treasury's commitment to provide accurate and reliable data, based on the challenges identified in the Executive Summary, Treasury made the decision to exclude Applicant Flow data from the FY 2023 submission. OCRE is hopeful that efforts made in FY 2024 will provide Treasury the opportunity to submit accurate Applicant Flow data and Part J responses for the FY2024 report.

2. Does your agency have a trigger involving PWTD among the qualified internal applicants and/or selectees for promotions to the senior grade levels? (The appropriate benchmarks are the relevant applicant pool for qualified internal applicants and the qualified applicant pool for selectees.) For non-GS pay plans, please use the approximate senior grade levels. If “yes”, describe the trigger(s) in the text box. Select “n/a” if the applicant data is not available for your agency, and describe your plan to provide the data in the text box.

- a. SES
  - i. Qualified Internal Applicants (PWTD) Answer N/A
  - ii. Internal Selections (PWTD) Answer N/A
- b. Grade GS-15
  - i. Qualified Internal Applicants (PWTD) Answer N/A
  - ii. Internal Selections (PWTD) Answer N/A
- c. Grade GS-14
  - i. Qualified Internal Applicants (PWTD) Answer N/A
  - ii. Internal Selections (PWTD) Answer N/A
- d. Grade GS-13
  - i. Qualified Internal Applicants (PWTD) Answer N/A
  - ii. Internal Selections (PWTD) Answer N/A

Treasury and the bureaus do not have accurate Applicant Flow data required to submit a response to this question. Given Treasury's commitment to provide accurate and reliable data, based on the challenges identified in the Executive Summary, Treasury made the decision to exclude Applicant Flow data from the FY 2023 submission. OCRE is hopeful that efforts made in FY 2024 will provide Treasury the opportunity to submit accurate Applicant Flow data and Part J responses for the FY 2024 report.

3. Using the qualified applicant pool as the benchmark, does your agency have a trigger involving PWD among the new hires to the senior grade levels? For non-GS pay plans, please use the approximate senior grade levels. If “yes”, describe the trigger(s) in the text box. Select “n/a” if the applicant data is not available for your agency, and describe your plan to provide the data in the text box.

- a. New Hires to SES (PWD) Answer N/A
- b. New Hires to GS-15 (PWD) Answer N/A
- c. New Hires to GS-14 (PWD) Answer N/A

d. New Hires to GS-13 (PWD) Answer N/A

Treasury and the bureaus do not have accurate Applicant Flow data required to submit a response to this question. Given Treasury's commitment to provide accurate and reliable data, based on the challenges identified in the Executive Summary, Treasury made the decision to exclude Applicant Flow data from the FY 2023 submission. OCRE is hopeful that efforts made in FY 2024 will provide Treasury the opportunity to submit accurate Applicant Flow data and Part J responses for the FY 2024 report.

4. Using the qualified applicant pool as the benchmark, does your agency have a trigger involving PWTD among the new hires to the senior grade levels? For non-GS pay plans, please use the approximate senior grade levels. If “yes”, describe the trigger(s) in the text box. Select “n/a” if the applicant data is not available for your agency, and describe your plan to provide the data in the text box.

a. New Hires to SES (PWTD) Answer N/A

b. New Hires to GS-15 (PWTD) Answer N/A

c. New Hires to GS-14 (PWTD) Answer N/A

d. New Hires to GS-13 (PWTD) Answer N/A

Treasury and the bureaus do not have accurate Applicant Flow data required to submit a response to this question. Given Treasury's commitment to provide accurate and reliable data, based on the challenges identified in the Executive Summary, Treasury made the decision to exclude Applicant Flow data from the FY 2023 submission. OCRE is hopeful that efforts made in FY 2024 will provide Treasury the opportunity to submit accurate Applicant Flow data and Part J responses for the FY 2024 report.

5. Does your agency have a trigger involving PWD among the qualified internal applicants and/or selectees for promotions to supervisory positions? (The appropriate benchmarks are the relevant applicant pool for qualified internal applicants and the qualified applicant pool for selectees.) If “yes”, describe the trigger(s) in the text box. Select “n/a” if the applicant data is not available for your agency, and describe your plan to provide the data in the text box.

a. Executives

i. Qualified Internal Applicants (PWD) Answer N/A

ii. Internal Selections (PWD) Answer N/A

b. Managers

i. Qualified Internal Applicants (PWD) Answer N/A

ii. Internal Selections (PWD) Answer N/A

c. Supervisors

i. Qualified Internal Applicants (PWD) Answer N/A

ii. Internal Selections (PWD) Answer N/A

Treasury and the bureaus do not have accurate Applicant Flow data required to submit a response to this question. Given Treasury's commitment to provide accurate and reliable data, based on the challenges identified in the Executive Summary, Treasury made the decision to exclude Applicant Flow data from the FY 2023 submission. OCRE is hopeful that efforts made in FY 2024 will provide Treasury the opportunity to submit accurate Applicant Flow data and Part J responses for the FY 2024 report.

6. Does your agency have a trigger involving PWTD among the qualified internal applicants and/or selectees for promotions to supervisory positions? (The appropriate benchmarks are the relevant applicant pool for qualified internal applicants and

the qualified applicant pool for selectees.) If “yes”, describe the trigger(s) in the text box. Select “n/a” if the applicant data is not available for your agency, and describe your plan to provide the data in the text box.

a. Executives

i. Qualified Internal Applicants (PWTD) Answer N/A

ii. Internal Selections (PWTD) Answer N/A

b. Managers

i. Qualified Internal Applicants (PWTD) Answer N/A

ii. Internal Selections (PWTD) Answer N/A

c. Supervisors

i. Qualified Internal Applicants (PWTD) Answer N/A

ii. Internal Selections (PWTD) Answer N/A

Treasury and the bureaus do not have accurate Applicant Flow data required to submit a response to this question. Given Treasury's commitment to provide accurate and reliable data, based on the challenges identified in the Executive Summary, Treasury made the decision to exclude Applicant Flow data from the FY 2023 submission. OCRE is hopeful that efforts made in FY 2024 will provide Treasury the opportunity to submit accurate Applicant Flow data and Part J responses for the FY 2024 report.

7. Using the qualified applicant pool as the benchmark, does your agency have a trigger involving PWD among the selectees for new hires to supervisory positions? If “yes”, describe the trigger(s) in the text box. Select “n/a” if the applicant data is not available for your agency, and describe your plan to provide the data in the text box.

a. New Hires for Executives (PWD) Answer N/A

b. New Hires for Managers (PWD) Answer N/A

c. New Hires for Supervisors (PWD) Answer N/A

Treasury and the bureaus do not have accurate Applicant Flow data required to submit a response to this question. Given Treasury's commitment to provide accurate and reliable data, based on the challenges identified in the Executive Summary, Treasury made the decision to exclude Applicant Flow data from the FY 2023 submission. OCRE is hopeful that efforts made in FY 2024 will provide Treasury the opportunity to submit accurate Applicant Flow data and Part J responses for the FY 2024 report.

8. Using the qualified applicant pool as the benchmark, does your agency have a trigger involving PWTD among the selectees for new hires to supervisory positions? If “yes”, describe the trigger(s) in the text box. Select “n/a” if the applicant data is not available for your agency, and describe your plan to provide the data in the text box.

a. New Hires for Executives (PWTD) Answer N/A

b. New Hires for Managers (PWTD) Answer N/A

c. New Hires for Supervisors (PWTD) Answer N/A

Treasury and the bureaus do not have accurate Applicant Flow data required to submit a response to this question. Given Treasury's commitment to provide accurate and reliable data, based on the challenges identified in the Executive Summary, Treasury made the decision to exclude Applicant Flow data from the FY 2023 submission. OCRE is hopeful that efforts made in FY 2024 will provide Treasury the opportunity to submit accurate Applicant Flow data and Part J responses for the FY 2024 report.

## Section VI: Plan to Improve Retention of Persons with Disabilities

To be model employer for persons with disabilities, agencies must have policies and programs in place to retain employees with disabilities. In this section, agencies should: (1) analyze workforce separation data to identify barriers retaining employees with disabilities; (2) describe efforts to ensure accessibility of technology and facilities; and (3) provide information on the reasonable accommodation program and workplace assistance services.

**A. VOLUNTARY AND INVOLUNTARY SEPARATIONS**

1. In this reporting period, did the agency convert all eligible Schedule A employees with a disability into the competitive service after two years of satisfactory service (5 C.F.R. § 213.3102(u)(6)(i))? If “no”, please explain why the agency did not convert all eligible Schedule A employees.

Answer Yes

The IRS timely converted 29 out of 31 eligible Schedule A employees with a disability into the competitive service after two years of satisfactory service (5 C.F.R. § 213.3102(u)(6)(i)) in FY 2023. The remaining 2 eligible employees were not converted due to performance issues.

2. Using the inclusion rate as the benchmark, did the percentage of PWD among voluntary and involuntary separations exceed that of persons without disabilities? If “yes”, describe the trigger below.

a.Voluntary Separations (PWD) Answer Yes

b.Involuntary Separations (PWD) Answer Yes

The inclusion rate for PWD (10.80%) exceeded the inclusion rate for persons with no disability (9.86%) for voluntary separations so there is a trigger. • The inclusion rate for PWD (0.90%) exceeded the inclusion rate of persons with no disability (0.82%) for involuntary separations so there is a trigger.

Seperations	Total #	Reportable Disabilities %	Without Reportable Disabilities %
Permanent Workforce: Reduction in Force	0	0.00	0.00
Permanent Workforce: Removal	806	0.88	0.92
Permanent Workforce: Resignation	5682	5.46	6.63
Permanent Workforce: Retirement	2739	3.28	3.09
Permanent Workforce: Other Separations	1007	2.00	1.01
Permanent Workforce: Total Separations	10234	11.62	11.65

3. Using the inclusion rate as the benchmark, did the percentage of PWTD among voluntary and involuntary separations exceed that of persons without targeted disabilities? If “yes”, describe the trigger below.

a.Voluntary Separations (PWTD) Answer Yes

b.Involuntary Separations (PWTD) Answer Yes

The inclusion rate for PWTD (11.33%) exceeded the inclusion rate for persons with no disability (9.86%) for voluntary separations so there is a trigger. • The inclusion rate for PWTD (0.90%) exceeded the inclusion rate of persons with no disability (0.82%) for involuntary separations so there is a trigger.

Seperations	Total #	Targeted Disabilities %	Without Targeted Disabilities %
Permanent Workforce: Reduction in Force	0	0.00	0.00
Permanent Workforce: Removal	806	0.90	0.92
Permanent Workforce: Resignation	5682	4.91	6.52
Permanent Workforce: Retirement	2739	4.34	3.08
Permanent Workforce: Other Separations	1007	2.04	1.12

Seperations	Total #	Targeted Disabilities %	Without Targeted Disabilities %
Permanent Workforce: Total Separations	10234	12.19	11.63

4. If a trigger exists involving the separation rate of PWD and/or PWTD, please explain why they left the agency using exit interview results and other data sources.

Through the third quarter of FY23, of the permanent PWD that separated from the agency, 47.7% had resigned and 28.3% retired. The Exit Survey results (through July 2023) showed that most separating PWD (with known business units) retired (58.8%), resigned (23.1 %) or transferred to another agency (6.8%). Across all groups of separating PWD, Job related stress had the strongest impact on their decision to separate from the agency (47.7%), followed by concerns with the amount of resources available to do their job (31.8%), their option to telecommute (31.8%), and their office's morale (30.7%). More than half (54.8%) of PWD respondents indicated they would return to work after separating due to Job-Related Stress. Similarly, over three-fourths (76.2%) indicated that something could have been done to prevent them from separating.

**B. ACCESSIBILITY OF TECHNOLOGY AND FACILITIES**

Pursuant to 29 CFR §1614.203(d)(4), federal agencies are required to inform applicants and employees of their rights under Section 508 of the Rehabilitation Act of 1973 (29 U.S.C. § 794(b), concerning the accessibility of agency technology, and the Architectural Barriers Act of 1968 (42 U.S.C. § 4151-4157), concerning the accessibility of agency facilities. In addition, agencies are required to inform individuals where to file complaints if other agencies are responsible for a violation.

1. Please provide the internet address on the agency’s public website for its notice explaining employees’ and applicants’ rights under Section 508 of the Rehabilitation Act, including a description of how to file a complaint.

<https://www.irs.gov/about-irs/accessibility-notice-of-rights>

2. Please provide the internet address on the agency’s public website for its notice explaining employees’ and applicants’ rights under the Architectural Barriers Act, including a description of how to file a complaint.

<https://www.irs.gov/pub/irs-utl/taxpayer-accessibility-guide.pdf>

3. Describe any programs, policies, or practices that the agency has undertaken, or plans on undertaking over the next fiscal year, designed to improve accessibility of agency facilities and/or technology.

Telecommunication Relay Service (TRS) is working with iYellow to prepare for Video Remote Interpreting (VRI) through Microsoft Teams. Previously, this option was only available for Video Phone to Video Phone. This feature will increase consumers capabilities and maximize the use of the Microsoft Teams platform. The total number of sign language and Communication Access Realtime Translation (CART) services currently is an amazing 99.03% fill rate. The Disability Services Division (DSD) continues to pursue effective alternate solutions to ensure our consumers' needs are being met. DSD works closely with their contract vendor to identify hard-to-fill locations where our services are increasing due to IRS personnel being hired. Contract vendor is doing a great job in recruiting and vetting additional interpreters and cart writers in those hard-to-fill locations. Additionally, DSD Managers successfully filled vacant Sign Language Interpreter positions which will have a positive impact on future demand of DSD services. In an effort to provide outstanding Sign Languge Interpreting and CART services to our customers, two additional Sign Language Interpreters (SU's) were hired to increase the footprint of their capability. As a result, backlogged requests for services due to vacancies were able to be filled. The IRS is in the process of implementing a "ServiceNow" intake tool in order to optimize and modernize our capabilities to meet rising consumer needs. Additionally, this system allows for consumer to track pending assignment requests in real time status. Furthermore, the agency is planning to provide future training sessions intended for Managers of Deaf, and Hard of Hearing employees and training presentation of Understanding Sign Language Interpreters. The IRS has been identified as the model to accommodate employees for SU/CART services using Video Remote Interpreting. The agency partnered with the U.S. State Department Interagency collaboration group to discuss the IRS delivery of SU/CART services for consistency in delivery of services in the Federal Government. An overview of our delivery of services using a Contract Vendor, as well as our own IRS CADRE of interpreters was provided. The goal was to make passport centers, American citizen offices and

posts more accessible for the public. The State Department expressed KUDOS to the IRS for taking time out for the partner to raise the standard for interpreting services across federal agencies with national and international impact. In FY23, EDI's Civil Rights Unit (CRU) conducted compliance visits at 120+ locations where taxpayers receive assistance from the agency, as well as programs conducted by its recipients of federal financial assistance. The compliance visits provided CRU with an opportunity to assess the accessibility of recipient programs and facilities for taxpayers in a proactive manner. Typically, recommendations on enhancing facility accessibility and access to programs/services are made during the compliance visits. CRU has prepared a report for the agency and its respective grant program offices to elevate findings and recommendations for improving program accessibility. In preparation of FY24, CRU has also conducted over 300 pre-award civil rights reviews of grant applications to certify that grant applicants have met their obligation to fulfill civil rights and accessibility reporting requirements.

### C. REASONABLE ACCOMMODATION PROGRAM

Pursuant to 29 C.F.R. § 1614.203(d)(3), agencies must adopt, post on their public website, and make available to all job applicants and employees, reasonable accommodation procedures.

1. Please provide the average time frame for processing initial requests for reasonable accommodations during the reporting period. (Please do not include previously approved requests with repetitive accommodations, such as interpreting services.)

In the first three quarters of FY23, the IRS received a total of 3,330 new reasonable accommodation (RA) requests and closed out an inventory of 3,645 requests in an average of 98 business days. Processing of RA requests was impacted by an extraordinary spike in receipts in FY22, including more than 5,400 in the 3rd and 4th quarters of FY22. In addition to the increasing RA processing staff, the IRS is adjusting processes to increase efficiency and reduce the amount of time needed to fully address accommodation needs and afford effective accommodations for employees/applicants with disabilities. For example, where it is necessary to explore reassignment of an employee as an accommodation of last resort, it is conducting IRS and Treasury-wide job searches concurrently rather than consecutively. Additionally, RACs are pressing for employees seeking accommodation and management to engage in substantive conversations facilitated by the RACs to exchange information and identify viable options for effective accommodation rather than the RAC meeting separately with each and conveying information back and forth in a time-consuming manner.

2. Describe the effectiveness of the policies, procedures, or practices to implement the agency's reasonable accommodation program. Some examples of an effective program include timely processing requests, timely providing approved accommodations, conducting training for managers and supervisors, and monitoring accommodation requests for trends.

The IRS reasonable accommodation training cadre presented 41 training sessions (totaling over 58 hours) on various topics to 2,574 participants (majority being managers). Particularly noteworthy was the training on the Reasonable Accommodations process for the Taxpayer Experience Office and Reasonable Accommodation training sessions in the Equal Employment Opportunity (EEO) Counselor's Refresher course. There is also a training module on Reasonable Accommodation conducted during the Fundamental Management Skills (FMS) training for all new managers. In addition to the RA module, the FMS content includes EEO and Diversity Management, Employee and Labor Relations, and Performance Management modules. This FY, there have been 41 such FMS sessions. The IRS Disability Services Section (DSS) conducted multiple trainings sessions for front line managers on SU and CART Services. There have been a variety of presentation topics developed by the DSS SU and management team. In FY23, training was presented to over 200 managers that supervise Deaf and/or Hard of Hearing (DHoH) employees in a variety of discussion topics such as "DHoH Awareness," "Best Practices While Working with DHoH Employees," "Requesting SU/CART Services Overview" (which includes information on virtual, face-to-face, and remote sign language interpreting; onsite CART; Telecommunication Relay Services and Conference Captioning, etc.). The IRS' newest training - "DHoH/SU Culture," an interactive presentation that goes beyond explaining to our managers how to request services (as required by the ADA) emphasizes the benefits of having qualified interpreters for DHoH peers and was showcased to a total of 156 participants. The IRS' cadre of SU's remain ready to provide access to communication at any given moment. For example, while presenting a "Best Practices While Working with DHOH Employees" training session to the Multimedia Developers Conference/Technology Enabled Learning group, a deaf employee was in attendance and the event organizer had not requested interpreting services. Our SU's not only presented the topic, but also provided the necessary interpreting services for the employee. The IRS provides enhanced development and delivery of comprehensive learning opportunities that promote EDIA. In FY23, there were 82 Lunch and Learn sessions conducted on EDIA topics with a total of 10,842 attendees; 4 new Hire Overview Sessions were held with a total of 117 attendees; 19 training workshops with a total of 565 attendees and 36 IRS Training collaborations with a total of 3,680 attendees. Implementation of Treasury's Reasonable Accommodations Tracker (RA Tracker), an application information system used to report department wide reasonable accommodations requests and provide aggregate data through generated reports annually to the Office of Personnel

Management (OPM) and EEOC, was delayed. The original plan was to finalize all enhancements by April 2022 and implement in May; however, due to the unprecedented RA inventory, implementation has been delayed to Q2 of FY24 to allow for a feature to auto-populate fields through HR Connect. This feature would reduce intake from ten minutes to two to three minutes. After the President signed an Executive Order on Moving Beyond COVID-19 Vaccination Requirements for Federal Workers on May 9, 2023 - revoking Executive Orders 14042 and 14043 which required vaccination against COVID-19 for federal employees and contractors, the IRS advised employees it is no longer necessary for the Service to consider employee reasonable accommodation requests seeking exemption from the vaccination requirement based either on medical conditions or religious beliefs. The IRS closed more than 6,700 of these requests that were pending consideration. The IRS published an article for its managers advising them that the Pregnant Workers Fairness Act (PWFA), effective June 27, 2023, requires reasonable accommodations for known limitations related to pregnancy, childbirth or related medical conditions and the importance of being flexible to meet the needs of employees with these limitations. The IRS also provided its Reasonable Accommodation Coordinators with guidance on the provisions of the PWFA and referenced an array of existing policies, programs and procedures geared towards pregnant employees and parents which can be leveraged quickly to meet employee needs without extensive review and assessment. Where more in-depth consideration is warranted, the RACs stand ready to assist employees and managers with identifying options for accommodation which are consistent with business exigencies. EDI continues to ensure the Service meets its obligations to afford reasonable accommodations for recurring needs such as sign-language interpretation and realtime transcription services. During the first half of Fiscal Year 2023, EDI fulfilled 3,506 requests for such services representing a 99.2% fill rate. Lastly, there is a training component on Reasonable Accommodation conducted during the Fundamental Management Skills (FMS) training which is a blend of approaches designed to equip new managers with the knowledge and skills needed to timely and correctly perform the transactional and administrative procedures necessary to maintain a productive and engaged work team. Content includes EEO and Diversity Management, Employee and Labor Relations, and Performance Management. As of Q2, there were 10 sessions (virtually and in person) delivered to 242 managers.

**D. PERSONAL ASSISTANCE SERVICES ALLOWING EMPLOYEES TO PARTICIPATE IN THE WORKPLACE**

*Pursuant to 29 CFR §1614.203(d)(5), federal agencies, as an aspect of affirmative action, are required to provide personal assistance services (PAS) to employees who need them because of a targeted disability, unless doing so would impose an undue hardship on the agency.*

Describe the effectiveness of the policies, procedures, or practices to implement the PAS requirement. Some examples of an effective program include timely processing requests for PAS, timely providing approved services, conducting training for managers and supervisors, and monitoring PAS requests for trends.

The IRS has published guidance and procedures concerning Personal Assistance Services (PAS) in the Internal Revenue Manual at IRM 1.20.5, where managers and employees can readily locate them. Information on PAS is also available on the IRS's internal and external websites. This year, the IRS received its first request for PAS and is in the process of procuring the needed services using the Department of the Treasury's existing Blanket Purchase Agreement to bring this to fruition.

**Section VII: EEO Complaint and Findings Data**

**A. EEO COMPLAINT DATA INVOLVING HARASSMENT**

- 1. During the last fiscal year, did a higher percentage of PWD file a formal EEO complaint alleging harassment, as compared to the governmentwide average?

Answer N/A

- 2. During the last fiscal year, did any complaints alleging harassment based on disability status result in a finding of discrimination or a settlement agreement?

Answer N/A

- 3. If the agency had one or more findings of discrimination alleging harassment based on disability status during the last fiscal year, please describe the corrective measures taken by the agency.

N/A

**B. EEO COMPLAINT DATA INVOLVING REASONABLE ACCOMMODATION**

1. During the last fiscal year, did a higher percentage of PWD file a formal EEO complaint alleging failure to provide a reasonable accommodation, as compared to the government-wide average?

Answer N/A

2. During the last fiscal year, did any complaints alleging failure to provide reasonable accommodation result in a finding of discrimination or a settlement agreement?

Answer Yes

3. If the agency had one or more findings of discrimination involving the failure to provide a reasonable accommodation during the last fiscal year, please describe the corrective measures taken by the agency.

1) IRS-22-0045-F (R/A) ORDER The IRS shall take the following actions: 1. Ensure that Complainant's files and all former employee files that were in the vacant office have been returned to Complainant and the former DCO employees (or their newer management where appropriate) within thirty (30) days of this decision. 2. Conduct a review in conjunction with the IRS Records and Information Management Office and the IRS Office of Equity, Diversity, and Inclusion to ensure that all hard copy employee medical files in the Kansas City, MO DCO facility are being stored in a proper manner and for an appropriate length of time. Provide a report summarizing the review, who was involved, what was done to survey the storage and removal of such files, and the findings and recommendations, within one-hundred and twenty (120) days of this decision. 3. Pay compensatory damages (if any) to Complainant within one hundred and twenty (120) days of receipt of a forthcoming compensatory damages decision to be issued by the Office of Civil Rights and EEO, establishing the amount of damages to which Complainant is entitled. Per the below guidance, Complainant may submit evidence of compensatory damages within thirty (30) days of her receipt of this decision. If Complainant uses the services of an attorney, she may petition for attorney's fees, in accordance with 29 CFR §1614.501 (e), within thirty (30) days of her receipt of this decision. 4. Provide training on the medical confidentiality provisions of the Rehabilitation Act to S 1 , M 1 , the named Department Managers, and S3. 5. Consider taking appropriate disciplinary action against S1. Please note that training is not considered disciplinary action. 6. In compliance with the Elijah Cummings Federal Employee Antidiscrimination Act of 2020, Public Law 116-283, within sixty (60) days of receiving the FAD, notify OCRE: (1) whether disciplinary action has been proposed against the identified discriminating officials and (2) the reasons for any proposed disciplinary action. If disciplinary action is not taken, provide a brief explanation regarding the reasons why disciplinary action was not proposed. 7. Within ten (10) days of this decision, post the attached notice regarding discrimination on all employee bulletin boards, both electronic and physical, in the IRS 333 W. Pershing Road, Kansas City, MO facility, as well as on the IRS main intranet site for employees in the Wage & Investment, Data Conversion Operations. The notice shall remain posted for sixty (60) consecutive days. In the absence of electronic bulletin boards, the notice must be emailed to all employees' supervisors and managers in Data Conversion Operations. The original signed notice is to be provided to the Office of Civil Rights and EEO within ten (10) calendar days of the expiration of the posting period. 8. Provide a report to OGRE with appropriate documentation showing implementation of these remedies, with the first report due within sixty (60) days of receipt of the decision and with reports issued monthly until a final implementation report is issued. (2) IRS-22-0887-F (R/A) ORDER The IRS shall take the following actions: 1. Pay compensatory damages (if any) to Complainant within one hundred twenty (120) days of receipt of a forthcoming compensatory damages decision to be issued by the Office of Civil Rights and EEO, establishing the amount of damages to which Complainant is entitled. a) Per the below guidance, Complainant may submit evidence of compensatory damages within thirty (30) days of the date of receipt of this decision. b) If Complainant uses the services of an attorney, she may petition for attorney's fees, in accordance with 29 CFR §1614.501(e), within thirty (30) days of her receipt of this decision. 2. Reinstate Complainant to the position of Internal Revenue Agent, 0512-07, effective the date of the issuance of this order, including any step increases, bonuses, and promotions that would have occurred, assuming fully successful performance. 6 Although training will be necessary, Complainant should be reinstated as if she had not been wrongfully terminated and she successfully completed her probationary period. 3. Engage in the interactive process with Complainant to provide effective reasonable accommodation, with a focus on Complainant's specific requests and a reliance on the input of the Reasonable Accommodation Coordinator and the already provided Federal Occupational Health assessments. 4. Reinstate accrued sick and annual leave that Complainant used between March 25, 2022 and September 19, 2022, resulting from failure to provide reasonable accommodation. Complainant shall submit evidence to document the dates of any such leave within thirty (30) days of the date of receipt of this decision. 5. Within one hundred twenty ( 120) days of the issuance of this Order, the Agency shall pay Complainant back pay beginning from September 19, 2022 until the date of this decision, plus



applicable interest and other benefits due to Complainant (including, but not limited to leave compensation, where applicable), pursuant to 29 C.F.R. § 1614.501 and 5 C.F.R. § 550.805. Restoration and compensation for leave taken due to discrimination (of the types that are entitled to a cash payment at the time of retirement) should be calculated for the period from March 25, 2022 (when Complainant submitted her reasonable accommodation request) through the date of her termination. In calculating back pay and benefits, the Agency should assume that Complainant was "ready, willing, and able to work" from September 19, 2022, the date of her termination, and it should include any step increases, bonuses, and promotions that would have occurred, assuming fully successful performance. The Agency shall add to its final amount of back pay and other benefits, an additional payment to offset any tax liability on the lump sum payment. a. The Agency must provide documentation including a plain language, step-by-step narrative that clearly sets forth an explanation for its calculations and payments, including any offsets and deductions considered. The narrative should explain the specific amounts and types of leave taken by Complainant between March 25, 2022 and September 19, 2022; how it determined how much leave was attributed to discrimination; and the reasons behind its decision regarding the types of leave that are compensable, and how much leave should be paid out to Complainant's estate. 6. Provide a minimum of six (6) hours of EEO training to S1, S2, and the members of the Commissioner's Human Capital Board (HCB), with an emphasis on disability discrimination and management's obligations to provide reasonable accommodation. 7. Consider taking appropriate disciplinary action against S1 and S2. Please note that training is not considered disciplinary action. 8. In compliance with the Elijah Cummings Federal Employee Antidiscrimination Act of 2020, Public Law 116-283, within sixty (60) days of receiving the FAD, notify the Office of Civil Rights and EEO (OCRE): (1) whether disciplinary action has been proposed against the identified discriminating officials and (2) the reasons for any proposed disciplinary action. If disciplinary action is not taken, provide a brief explanation regarding the reasons why disciplinary action was not proposed. 9. Within ten (10) days of this decision, post the attached notice regarding discrimination on all employee bulletin boards, both electronic and physical, in the IRS, 31 Hopkins Plaza, Baltimore, MD facility, as well as on the IRS, Tax Exempt and Government Entities (TE/GE) Employee Plans (EP) Examination's main intranet site. The notice shall remain posted for sixty (60) consecutive days. In the absence of electronic bulletin boards, the notice must be emailed to all employees' supervisors and managers in TE/GE EP. The original signed notice is to be provided to the Office of Civil Rights within ten (10) calendar days of the expiration of the posting period. 10. Provide a report to OCRE with appropriate documentation showing implementation of these remedies, with the first report due within sixty (60) days of receipt of the decision and with reports issued monthly until a final implementation report is issued. (3) IRS-21-0567-F (RIA) ORDER The Departmental decision ordered relief for the Complainant and directed IRS to take the following corrective actions: 1. Pay compensatory damages (if any) to the Executor of Complainant's estate within 120 days of receipt of a forthcoming compensatory damages decision to be issued by the Office of Civil Rights and EEO, establishing the amount of damages to which Complainant is entitled. a. Per the below guidance, the Executor of Complainant's estate, presumably Complainant's husband, may submit evidence of compensatory damages within forty-five (45) days of the date of receipt of this decision. To receive compensatory damages, t must also provide written evidence from the Missouri Probate Court that he has been named Executor of Complainant's estate. b. If the Executor uses the services of an attorney, the Executor may petition for attorney's fees, in accordance with 29 CFR §1614.5011. Any request for attorney's fees must be submitted to the Acting Director, Office of Civil Rights and EEO (OCRE), along with the compensatory damages evidence submission, within forty-five (45) days of the date of receipt of this decision. 2. Provide a minimum of six (6) hours of EEO training to S3 and S4, with an emphasis on disability discrimination and management's obligations to provide reasonable accommodation. 3. Consider taking appropriate disciplinary action against S3 and S4. Please note that training is not considered disciplinary action. See Report for remaining findings of discrimination.

## Section VIII: Identification and Removal of Barriers

*Element D of MD-715 requires agencies to conduct a barrier analysis when a trigger suggests that a policy, procedure, or practice may be impeding the employment opportunities of a protected EEO group.*

1. Has the agency identified any barriers (policies, procedures, and/or practices) that affect employment opportunities for PWD and/or PWTD?

Answer No

2. Has the agency established a plan to correct the barrier(s) involving PWD and/or PWTD?

Answer N/A

3. Identify each trigger and plan to remove the barrier(s), including the identified barrier(s), objective(s), responsible official(s), planned activities, and, where applicable, accomplishments

<b>Source of the Trigger:</b>	Workforce Data (if so identify the table)					
<b>Specific Workforce Data Table:</b>	Workforce Data Table - B6					
<b>STATEMENT OF CONDITION THAT WAS A TRIGGER FOR A POTENTIAL BARRIER:</b>  Provide a brief narrative describing the condition at issue.  How was the condition recognized as a potential barrier?	Lower than expected participation for PWDs in mission critical occupations Revenue Agents and Revenue Officers when compared to the federal goal of 12 percent. Trigger 1 • GS-11/12/13/14 for Revenue Agent (GS-0512) • GS-12/13/14 for Revenue Officer (GS-1169)					
<b>STATEMENT OF BARRIER GROUPS:</b>	<i>Barrier Group</i> People with Disabilities					
<b>Barrier Analysis Process Completed?:</b>	Y					
<b>Barrier(s) Identified?:</b>	N					
<b>STATEMENT OF IDENTIFIED BARRIER:</b>  Provide a succinct statement of the agency policy, procedure or practice that has been determined to be the barrier of the undesired condition.	<b>Barrier Name</b>		<b>Description of Policy, Procedure, or Practice</b>			
	No Barriers have been identified associated with this trigger.		No Barriers have been identified associated with this trigger.			
	Barrier		The specific policy, procedure, or practice causing the less than expected participation rates for people with disabilities is currently unknown. Further analysis is needed.			
<b>Objective(s) and Dates for EEO Plan</b>						
<b>Date Initiated</b>	<b>Target Date</b>	<b>Sufficient Funding / Staffing?</b>	<b>Date Modified</b>	<b>Date Completed</b>	<b>Objective Description</b>	
10/01/2018	09/30/2019	Yes			Complete a barrier analysis to identify the specific policy, procedure, or practice that could be causing the trigger.	
<b>Responsible Official(s)</b>						
<b>Title</b>		<b>Name</b>		<b>Standards Address The Plan?</b>		
Chief Diversity Officer - Equity, Diversity & Inclusion		Carrie Y. Holland		No		
IRS Human Capital Officer		Traci M. DiMartini		No		
<b>Planned Activities Toward Completion of Objective</b>						
<b>Target Date</b>	<b>Planned Activities</b>			<b>Sufficient Staffing &amp; Funding?</b>	<b>Modified Date</b>	<b>Completion Date</b>
10/17/2018	Conduct outreach to Agency leadership regarding the empowerment of PWDs in the workplace.			Yes		10/17/2018
10/30/2018	Meet with employee organizations to identify any issues employees encountered during the application/hiring process for a Revenue Agent position.			Yes		10/30/2018

<b>Planned Activities Toward Completion of Objective</b>				
<b>Target Date</b>	<b>Planned Activities</b>	<b>Sufficient Staffing &amp; Funding?</b>	<b>Modified Date</b>	<b>Completion Date</b>
01/03/2019	Meet with the program manager responsible for the "Service Wide Opportunities Listing" to discuss strategies to ensure that all BUs post job vacancies on the "Service Wide Opportunities Listing" so that employees are aware of internal job opportunities	Yes		01/03/2019
01/15/2019	Review position descriptions to determine if there are any mobility restrictions for this occupation.	Yes		01/15/2019
01/30/2019	Review the participation rate of PWDs in leadership programs to determine if barriers exists that are negatively impacting leadership opportunities for this group.	Yes		01/30/2019
01/30/2019	Establish a barrier analysis project team of EDI, HCO and management to assist in identifying barriers impacting the participation rate of PWDs in GS-0512 and higher grades.	Yes	09/30/2020	01/15/2020
03/03/2019	Connected recruitment with President of the Greater Philadelphia Chapter of the National Federation of the Blind and FEMA Region III Disability Integration Specialist.	Yes		03/03/2019
06/30/2020	Collaborate with HCO to review the IRS selection/hiring process.	Yes		06/30/2020
09/30/2020	Collaborate with HCO to review the promotion policy.	Yes		06/30/2020
09/30/2020	Develop recommendations from barrier analysis and present to EDI leadership.	Yes		09/03/2020
10/15/2020	Develop workplan to address barriers identified.	Yes		10/02/2020
01/31/2021	Develop and issue a memo to business unit executives to ensure managers and selecting officials are informed of IRS hiring goals of 12% for PWD and 2% for PWTD.	Yes		09/16/2021
03/30/2021	Review for FY 19 & FY20 data for PWD/PWTD to determine if trends have changed in the various areas initially reviewed (FY16-18)	Yes		11/03/2021
03/30/2022	Identify and review benchmarks against other federal agencies to determine what has been done to increase participation rates for PWD/PWTD.	Yes		
06/30/2022	Review promising practices reported out as part of Executive Order 14035 to identify options for IRS to engage further.	Yes		
06/01/2021	Establish a mock interview cadre available to all employees for the enhancement of their interview skills.	Yes		06/01/2021
10/30/2021	Host National Disability Employment Awareness Month (NDEAM) event bringing awareness to PWDs in the workforce and the boundless opportunities available to all employees for all positions and grades.	Yes		10/13/2021
02/28/2022	Special emphasis program manager (SEPM) will meet with the program manager for Executive Order 14035 to review and discuss promising practices to identify options for IRS to engage further to increase participation rates for PWDs.	Yes		02/07/2022

<b>Planned Activities Toward Completion of Objective</b>				
<b>Target Date</b>	<b>Planned Activities</b>	<b>Sufficient Staffing &amp; Funding?</b>	<b>Modified Date</b>	<b>Completion Date</b>
07/30/2022	EDI will partner w/ HCO to deliver a presentation on mentoring servicewide.	Yes		07/27/2022
11/30/2022	Collaborate with appropriate personnel to bring awareness and provide accurate information about hiring goals and special hiring authorities by disseminating information throughout agency.	Yes		02/21/2023
03/31/2023	Collaborate with appropriate personnel to provide education on targeted disabilities.	Yes		04/07/2023
04/30/2023	Provide Employee Organizations/Employee Resource Groups, Relationship Managers, and Business Based Divisions with FY23 Q1-Q2 data to monitor agency's progress toward increasing the participation of PWDs (overall and for all MCO's, all grades.	Yes		05/15/2023
06/30/2023	Collaborate with appropriate personnel to conduct a SF-256 campaign to bring awareness to the importance of and directions on how to self-identify as having a disability, to update current SF-256, or to submit initial SF-256, via podcast, articles, emails, etc.	Yes		09/30/2023
10/31/2023	Plan NDEAM event	Yes		09/30/2023
10/31/2023	Host NDEAM event to bring awareness to PWDs in the workforce and the boundness opportunities available to all employees for all positions and grades.	Yes		09/30/2023

<b>Report of Accomplishments</b>	
<b>Fiscal Year</b>	<b>Accomplishment</b>
2018	A Disability Awareness program was conducted to educate and provide resources for managers to increase opportunities for persons with disabilities. Members from the "Employee Organization Visually Impaired Employee Workforce (VIEW)" were interviewed to identify any reason(s) for the low participation rate of Revenue Agents within the Agency. Members of VIEW feel that the reasons they are not being selected is because the selecting officials have an unconscious bias against PWDs.
2019	<p>Presentation was conducted on 'topic', "America's Workforce, Empowering All". the Director of the Employer Policy Team at the Department of Labor's Office of Disability Employment Policy (ODEP) provided managers and employees with information to assist them with employing and including PWD.</p> <p>Collaborated with IRS recruitment, the Greater Philadelphia Chapter of the National Federation of the Blind and FEMA Region III Disability Integration Specialist to provide resume's to IRS HCO.HCO has agreed to accept applications from these agency's for RO positions grades 11-14.</p>
2020	<p>The Barrier Analysis (BA) team provided a briefing to Chief Diversity Officer, Associate Director, Diversity and Inclusion, Embedded EDI Directors, Associate Directors and Relationship Managers on the data, policy, practices and procedures that impacted the trigger contributing to low participation rates for PWD/T in RA and RO positions GS 11-14.</p> <p>Training was developed by the BA team to provide interviewing techniques for PWD/T.</p>

<b>Report of Accomplishments</b>	
<b>Fiscal Year</b>	<b>Accomplishment</b>
2022	<p>SEPM and program manager for Executive Order 14035 collaborated and discussed promising practices reported out as part of Executive Order 14035 to identify options for IRS to further increase participation rated for PWDs. The SEPM began developing training on Destigmatizing Mental Health and Depression Issues as identified as a need in the Government-wide Strategic Plan to Advance DEIA in the Federal Workforce, November 11, 2021.</p> <p>As of August 18, 2022, the mock interview cadre conducted 85 mock interviews.</p> <p>Facilitated an agency-wide event for NDEAM featuring an IRS employee with a disability to bring awareness of PWDs in the workforce and highlighted the boundless opportunities available to all employees for all positions and grades. EDI is partnering with the Dept. of Treasury to facilitate an all bureau NDEAM event; the planning committee has been meeting since October 21, 2022.</p> <p>The agency employee organization, Visually Impaired Employee Workforce (VIEW) continually advises and guides members (most members are blind or visually impaired) regarding issues that may arise in the everyday workplace such as reasonable accommodations, telework needs, troubleshooting and guidance on where to obtain assistance with software and hardware issues. The VIEW president has participated in projects such as the Treasury barrier analysis in support of the PWD community and most recently became fully engaged with IRS-Microsoft workshops focused on providing guidance and assistance to the PWD user community for navigating the ongoing Microsoft 365 migration as it relates to their assistive technology’s software and hardware tools. The VIEW president also presently serves as a SharePoint System administrator/citizen developer giving special focus to development of 508 compliant SharePoint sites and content. At the end of Q3 in FY22, the agency had 21.78% employees who were blind or visually impaired with 12.5% being revenue agents and 20% being revenue officers. The work of VIEW guides and assists these employees with the resources they need, and develops effective strategies and tools to enable them to bring their whole selves to work. This allows employees to fully focus on their jobs, advance their careers, and better serve the agency. VIEW uses their collective strength to confront workplace issues for the blind and visually impaired which could impede career development, advancement, and retention. Furthermore, VIEW members can network and develop new skills, assisting them with advancing their careers.</p> <p>The agency employee resource group, Military Outreach for Service (MOS) is largely comprised of military veterans (disabled vets make up 32% of agency PWD population with 7.3% being revenue agents and 5.98% being revenue officers). Its mission is to promote a veterans virtual network and community, and serves as an organization where IRS veteran employees can form collaborative relationships by sharing knowledge, mentoring, practical transition advice, and promote veteran celebrations in the IRS workplace. In FY22, MOS focused on establishing regular outreach with its members via bi-monthly newsletter emails and monthly virtual national meetings that shared articles, training opportunities and job announcements for all members, including revenue agents/officers. IRS MOS hosted multiple virtual training workshops to support professional development of veterans. Topics included Resume Writing, Veterans Administration Benefits and Services, the Military Buy-Back Program, and the IRS Mock Interview Program. Additionally, MOS hosted a panel with its two Executive sponsors entitled, “Answers to your Career, Professional Development, and Leadership Questions – Ask Our Senior Executives.” These professional development opportunities were attended by over 850 employees.</p> <p>Additionally, we’ve had the following participation in the programs below:</p> <ul style="list-style-type: none"> <li>• Mentoring program: 11.96% PWDs &amp; 4.51% PWTDs</li> <li>• Coaching program: 5.88% PWDs &amp; 3.36% PWTDs</li> <li>• Detail program: 10.86% PWDs &amp; 0.95 PWTDs</li> <li>• Leadership development program: 8.39% PWDs &amp; 2.10% PWTDs</li> </ul>

<b>Report of Accomplishments</b>	
<b>Fiscal Year</b>	<b>Accomplishment</b>
2021	<p>A memo was submitted to Business Unit Executives to Ensure Managers and Selecting Officials are informed of hiring goals of 12% for PWD and 2% for PWTD in all grade levels. Per the MD-715 tables as of 9/30/2021, the participation rates have increase for Revenue Agents with disabilities as follows: GS-11- from 10.1% to 13.98%, GS-12-from 9.2% to 11.17%, GS-13-from 7.1% to 8.14%, GS-14-from 5.36% to 6.5%.</p> <p>Per the MD-715 tables as of 9/30/2021 the participation rates have increase for Revenue Officers with disabilities as follows: GS-12-from 8.1% to 8.97% GS-13-from 7.4% to 7.77%, GS-14-from 2.3% to 6.32%.</p> <p>Established a mock interview cadre available to all employees for the enhancement of their interview skills. The mock interview continues to assist employees in learning how to answer difficult questions, develop interview strategies, improve communication skills, and reduce stress prior to a job interview.</p>
2023	<p>Article was published in Leaders' Alerts service wide publication bringing awareness and providing accurate information about hiring goals and special hiring authorities.</p> <p>Article was submitted for publishing in IRS Source and IRS Headlines providing education about targeted disabilities.</p> <p>Provided employee organizations and employee resource groups, relationship managers, and business-based directors with FY23 Q1-Q2 data to monitor agency's progress toward increasing the participation of PWDs.</p> <p>Hosted NDEAM event to bring awareness to PWDs in the workforce and the boundness opportunities available to all employees for all positions and grades.</p> <p>EDI continued to manage the mock interview cadre to help employees be better prepared to excel when being interviewed for positions. 173 mock interviews were given for FY23.</p> <p>Additionally, we had the following participation in programs:</p> <p>Mentoring program: 21.73% PWDs &amp; 4.19% PWTDs                      Coaching program: 10.36% PWDs &amp; 2.25% PWTDs                      Detail program: 14.94% PWDs &amp; 3.22% PWTDs                      Leadership development program: 9.32% PWDs &amp; 2.48% PWTDs</p> <p>The agency conducted a thorough investigation into the potential barriers for the triggers identified and determined it was not policy-related; however, in ensuring the workplace offers equal access, competition and opportunity, the agency formulated a plan for improvement and reported its findings (i.e., participation rates, perceived potential barriers, results of investigations, including how results were obtained, the plan of action and objectives). As of FY23, the agency has completed the planned activities and will continue to monitor the impact on the identified triggers and begin to review the PWD new hire rate and PWD voluntary and involuntary separations.</p>

4. Please explain the factor(s) that prevented the agency from timely completing any of the planned activities.

Not Applicable

5. For the planned activities that were completed, please describe the actual impact of those activities toward eliminating the barrier(s).

Managers were made aware that they have additional opportunities to hire PWD using special hiring authorities. Managers and employees are informed that IRS is obligated to support the recruitment and career advancement of PWD. Managers and employees were also educated on the EEOC goals of PWD in IRS. EO/ERGs, RMs, and BBDs were provided with data to make them aware of areas where participation rates are lower than expected for PWDs. This information will assist them when they are recruiting, hiring, or promoting for RA and RO positions. Exceeded the 12% goal for RA GS-12 Increased the participation rate of: RA GS-12,13 and RO GS-12,13 There were no complaints filed based on allegations of disability related to non-selection for the position of RAs and ROs. Managers and employees are informed that IRS is obligated to support the recruitment and career advancement of PWD. Managers and employees were also educated about the process for accounting for and reporting on the

percentage of PWD in IRS. EO/ERGs, RMs, and BBDs were provided with data to make them aware of areas where participation rates are lower than expected for PWDs. This information will assist them when they are recruiting, hiring or promoting for RA and RO positions

6. If the planned activities did not correct the trigger(s) and/or barrier(s), please describe how the agency intends to improve the plan for the next fiscal year.

N/A

