

FISCAL YEAR 2024

SB/SE Focus Guide – Working together to transform the employee & taxpayer experience

A message from SB/SE Commissioner Lia Colbert and Deputy Commissioner Maha Williams



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SB/SE
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Our theme for FY24 is **Working together to transform the employee and taxpayer experience**. As the new fiscal year begins, we are optimistic about the future and what it holds for you and the millions of taxpayers we serve.

Inflation Reduction Act

The historic Inflation Reduction Act (IRA) passed in August 2022, giving IRS funding that brings incredible opportunities to improve service, enhance the employee and taxpayer experiences, and modernize the IRS into a 21st century agency.

We can now deliver for our taxpayers and our workforce with things like updated technology, better training, and so much more.

Strategic Operating Plan

Released in April 2023, the **Strategic Operating Plan** provides a clear vision for transformation and includes five objectives, as highlighted on the next page.

Current Successes

The work we are doing here in SB/SE supports all five objectives. We are building on previous efforts and initiating new ones:

- Implementing flexible payment plans

- Launching new platforms like Business Tax Account and Information Returns Intake System
- Making it easy to submit responses to notices and letters with the Document Upload Tool
- Writing notices in plain language
- Expanding technologies that help taxpayers like voice bots and text chat
- Continuing digitalization efforts

FY24 Outlook

We will press forward in FY24 with a renewed focus on improved taxpayer and employee experiences and smarter enforcement. Our SB/SE vision will also focus on even greater collaboration across IRS.

Employee Safety

Employee safety is paramount. In FY23, we took several actions to put your safety first. We updated long-standing procedures, launched a joint safety effort with NTEU, and created an Employee Safety team. In FY24, we will continue to put your safety first and make improvements, so you feel safe no matter where you're working.

IRS Compliance Workplan

We'll have a joint IRS Compliance Workplan in FY24 that will help focus efforts and resources on narrowing the tax gap and other agency priorities. A joint workplan allows us to:

- Help taxpayers meet their tax responsibilities, pay what they owe and receive the tax benefits they should.
- Protect taxpayers from emerging scams and unscrupulous preparers and promoters.
- Strengthen compliance around clean energy incentives.

- Expand our field presence to address the non-filing and underpayment portion of the tax gap.
- Expand examinations in taxpayer segments where audit coverage has been minimal or in decline over the past decade.

Employee Improvements

Woven throughout the Strategic Operating Plan, you will see a key theme – making things better for our people. In FY24, you'll see workforce transformation through internal promotions and growth opportunities – as well as improved hiring that will help us onboard new hires more quickly and alleviate current workloads. Other improvements underway are:

- Better equipment, technology, and training as well as more opportunities for employees to connect in a hybrid environment.
- Expansion of benefits programs like Student Loan Repayment Program and Employee Referral Bonus Program.
- Improved case selection using high-quality data to optimize how you spend your time - whether you examine tax returns, collect taxes or support compliance work.
- Updated systems for accessing taxpayer information and managing cases.
- Onboarding for new hires who will be cross trained in key compliance work and regularly engage with employees across IRS.



We are excited to continue to work together to fulfill our mission while embracing this incredible opportunity to grow, evolve and improve the taxpayer and your employee experience.

– Lia Colbert & Maha Williams

Strategic Operating Plan Objectives & SB/SE's Areas of Focus

SB/SE will support IRS in each of the Strategic Operating Plan objectives.

Objective 1: Better Taxpayer Experience

- Support compliance transformation efforts to make it easy for taxpayers to meet their tax responsibilities, pay what they owe and receive the tax benefits they should.
- Expand communication and outreach to taxpayers to help them understand and meet their tax responsibilities.
- Ensure employees have the right tools and information to quickly and effectively meet taxpayer needs.

Objective 2: Faster Issue Resolution

- Develop taxpayer-centric notices that taxpayers can understand and deliver in ways they prefer.
- Proactively offer taxpayers appropriate options for past-due payment resolution.
- Expand engagement with non-filers by providing taxpayers with timely and tailored post-filing treatments to resolve issues and omissions on their tax returns.
- Provide early, tailored contacts to all taxpayers with past-due balances and escalate to more intensive treatments only when appropriate.

Objective 3: Smarter Enforcement

- Collaborate across the IRS to mitigate the risks of non-compliance and evolving threats.
- Grow SB/SE expertise and capacity to examine highly complex returns and issues more effectively.
- Ensure fairness across taxpayer groups with increased compliance focus in areas with complex issues and complex returns like high income/high wealth individuals, corporations and passthrough entities.

- Lead the agency in efforts to detect and deter abusive promoters and protect taxpayers from fraud and scams.
- Choose enforcement treatments that maximize opportunities to improve and sustain taxpayer compliance.

Objective 4: Advanced Technology & Analytics

- Use research and data analytics to propose solutions for non-compliance and emerging issues.
- Use data to inform operations and decision-making, allowing us to better focus our enforcement resources.
- Provide employees with the systems, technology, and data they need to effectively serve taxpayers.
- Expand the tools taxpayers need to access their data and self-serve via online services like Business Tax Account and Information Returns Intake System.

Objective 5: Empowered Employees

- Safeguard the health and safety of employees.
- Better equip managers to lead high-performing teams and support them with training, resources, and tools.
- Hire and retain a diverse workforce with the skills and abilities necessary to meet our objectives.
- Empower employees by providing opportunities through the development and delivery of workforce training.
- Deliver growth and learning opportunities by developing attractive career pathways for all employees.