

Date of Approval: 08/21/2025
Questionnaire Number: 2524

Basic Information/Executive Summary

What is the name of your project (system, database, pilot, product, survey, social media site, etc.)?

Digital Assistant - Outlook attachment download

Business Unit

Information Technology

Preparer

For Official Use Only

Subject Matter Expert

For Official Use Only

Program Manager

For Official Use Only

Designated Executive Representative

For Official Use Only

Executive Sponsor

For Official Use Only

Executive Summary: Provide a clear and concise description of your project and how it will allow the IRS to achieve its mission.

The Outlook Attachment Download Data Analytics (DA) Tool is designed to enhance the efficiency and accuracy of the Internal Revenue Service (IRS) by automating the retrieval and organization of email attachments from Outlook. This tool enables users to download attachments within a specified time, from selected senders, or based on specific subject criteria, while allowing customizable parameters for single or bulk downloads. Additionally, it provides a clear display of individual attachments within emails, improving accessibility and review processes. By streamlining attachment management, this solution supports the IRS in its mission to administer tax laws effectively, ensuring timely access to critical documents while reducing manual workload. The tool enhances data security, operational efficiency, and compliance by enabling structured and auditable handling of email attachments. This innovation aligns with the IRS's commitment to leveraging technology for improved taxpayer service and internal process optimization.

Personally Identifiable Information (PII)

Will this project use, collect, receive, display, store, maintain, or disseminate any type of Sensitive but Unclassified (SBU), Personally Identifiable Information (PII), or Federal Tax Information (FTI)?

Yes

Please explain in detail how this project uses sensitive data from inception to destruction (data lifecycle).

The Outlook Attachment Download Data Analytics (DA) Tool processes email communications and attachments, the automation only collects employee name, email address and system identifier to connect and log on to the mail server. To ensure compliance with federal privacy laws, this automation follows a structured privacy lifecycle from inception to destruction. The login credentials are retained for a period of 3 months before they expire and require re-authorization by the user.

Please select all types of Sensitive but Unclassified data (SBU)/Personally Identifiable Information (PII)/Federal Tax Information (FTI) that this project uses.

Email Address

Federal Tax Information (FTI)

Name

Online Identifiers

Cite the authority for collecting SBU/PII/FTI (including SSN if relevant).

PII for federal tax administration - generally IRC Sections 6001 6011 or 6012

PII for personnel administration - 5 USC

Product Information (Questions)

1 Is this PCLIA a result of a specific initiative or process improvement?

Yes

1.1 What is the name of the Business Unit (BU) or Agency initiative?

Improve Technology Operations

2 Describe in detail, the Robotic Process Automation (RPA) process; be sure to identify the project title and business unit owner; state what IRS Strategy or initiative it supports; identify the system or process it supports and if PII will be required for the RPA to run; identify activities and workflow controls with the type and capabilities that will be incorporated; lastly indicate how the service benefits from the use of this RPA. (Process, Library, Test Automation, Template.)

Robotic Process Automation (RPA): - Title: Digital Assistant - Outlook attachment download Owner: Information Technology - Supports: IRS Digitization and Modernization Effort (DME). - Systems: Microsoft Outlook Mail Server - PII Required: Yes (name, email address and System Identifier (SEID)). - Process: Operation: The Outlook Attachment Download Data Analytics (DA) Tool is designed to enhance the efficiency and accuracy of the Internal Revenue Service (IRS) by automating the retrieval and organization of email attachments from Outlook. This tool enables users to download attachments within a specified time, from selected senders, or based on specific subject criteria, while allowing customizable parameters for single or bulk downloads. Additionally, it provides a clear display of individual attachments within emails, improving accessibility and review processes.

3 Is this a new Robotic Process Automation (RPA) project?

Yes

4 Identify the IRS IT systems, applications, projects, and/or databases this RPA is applied to; include the associated system name.

The automation connects to Microsoft Outlook Mail Server to access the user profiles and download attachments.

5 Identify why the use of SBU/PII/FTI is required; include any type of Sensitive But Unclassified (SBU), Personally Identifiable Information (PII), or Federal Tax Information (FTI) that this project will create, collect, receive, use, process, maintain, access, inspect, display, store, disclose, disseminate, or dispose of.

The Outlook Attachment Download Data Analytics (DA) Tool processes sensitive data, including email communications and attachments, which may contain taxpayer information, personally identifiable information (PII), or other confidential IRS data. To ensure compliance with federal privacy laws, the tool follows a structured privacy lifecycle from inception to destruction.

6 Is your RPA Attended/Unattended?

Attended

7 Is this RPA process converting from paper to electronic format or automating a process currently performed by a human?

Yes

7.1 Explain the process being replaced/automated.

This automation is designed to automate the manual process of downloading and organizing email attachments in Outlook. Instead of employees having to search through emails and save files one by one, the tool lets them quickly find and download attachments based on sender, date, or subject (either individually or in bulk). It also makes attachments easier to view and manage while improving security and compliance by keeping track of downloads. This saves time, reduces errors, and helps IRS staff focus on more important work.

8 Indicate what level of complexity the RPA is classified as and if you were required to register with One Solution Delivery Lifecycle (OneSDLC) or not, or indicate if Information Technology's (ITs) Technical Insertion process was used for approval of this RPA.

This automation is medium complexity and registered with One Solution Delivery Lifecycle (OneSDLC).

9 Will connections or interdependencies be established for this RPA?

Yes

9.1 Will the connection be encrypted?

Yes

9.2 Will authentication/credentials be required?

Yes

9.3 Please provide details for the connection/interdependency. Indicate if this occurs on the backend versus through the system/user interface.

This automation connects to Microsoft mail server using the built-in backend internal Application Programming Interface (API) for logging into the application.

10 Indicate who has or will have permission to access the data and how users are authenticated.

As a pre-requisite, authorized users will be required to have an already approved Business Entitlement Access Request System (BEARS) to access the UiPath Assistant.

11 Indicate if Business Entitlement Access Request System (BEARS) entitlements are required for access and if Privileged User Management Access System (PUMAS) control management is applied for granting access to the system(s)? If BEARS/PUMAS are not applied, indicate what access controls are in place.

Yes. As a pre-requisite, authorized users will be required to have an already approved Business Entitlement Access Request System (BEARS) to access the UiPath Assistant.

12 Identify the maintenance tasks or updates performed; state whether or not the maintenance tasks are inherited from the host (UiPath Platform), or you are using customized maintenance activities.

The Automation is using UiPath Platform, and the maintenance tasks are inherited from the host (UiPath Platform).

13 Indicate if this product or system shares data outside of the United States or its territories.

No

14 Indicate if this system or Robotic Process Automation (RPA) is trained through the use of algorithms; indicate if the algorithm used contains data with a sensitivity classification. (Sensitive but unclassified data might include algorithms, methods, system data, or PII/FTI that could be used to re-identify a person.)

No

15 Describe this system's (RPAs) audit trail process in detail; include location of supporting documents (SPLUNK). Note: Upload of this document is required.

UiPath provides the audit trails at the organization/tenant level and these logs are stored in Microsoft Structured Query Language (mssql) database. UiPath also provides an integration to external log products like SPLUNK, and managed service uses SPLUNK as the log aggregator. All the UiPath logs are fed into Integrated Enterprise Portal (IEP) SPLUNK and IEP SPLUNK is connected to IRS SPLUNK. Any logs going to IEP SPLUNK will be forwarded to IRS SPLUNK. Location for Integrated Enterprise Portal (IEP) SPLUNK is as follows: Integrated Enterprise Portal (IEP) Splunk hostname: <https://laco-irs.mgt.afsiep.net/> Index: service_fabric_prod Source: rancher:uipath:audit.

Interfaces

Interface Type

IRS Systems, file, or database

Agency Name

outlook.office365.com

Incoming/Outgoing

Both

Transfer Method

Secured channel via HTTPS

Other Transfer Method

Systems of Records Notices (SORNs)

SORN Number & Name

IRS 36.003 - General Personnel and Payroll Records

Describe the IRS use and relevance of this SORN.

IRS Employee information is accessed.

SORN Number & Name

IRS 34.037 - Audit Trail and Security Records

Describe the IRS use and relevance of this SORN.

The audit logs capture the identity of the user using the RPA, the time and date of access to Project Tracking System (PTS) and the Integrated Financial System (IFS) and all the user's activity while using the RPA.

Records Retention

What is the Record Schedule System?

General Record Schedule (GRS)

What is the retention series title?

3.1: General Technology Management Records

What is the GRS/RCS Item Number?

011

What type of Records is this for?

Electronic

Please provide a brief description of the chosen GRS or RCS item.

System development records. These records relate to the development of information technology (IT) systems and software applications through their initial stages up until hand-off to production which includes planning, requirements analysis, design, verification and testing, procurement, and installation.

What is the disposition schedule?

Temporary. Destroy 5 years after system is superseded by a new iteration, or is terminated, defunded, or no longer needed for agency/IT administrative purposes, but longer retention is authorized if required for business use.

Data Locations

What type of site is this?

System

What is the name of the System?

outlook.office365.com

What is the sensitivity of the System?

Personally Identifiable Information (PII) including Linkable Data

What is the URL of the item, if applicable?

<https://outlook.office365.com/owa/ds.irsnet.gov/>

Please provide a brief description of the System.

The Office 365 mail server for Outlook, specifically when using Exchange Online, is typically outlook.office365.com for both incoming (IMAP/POP) and outgoing (SMTP) mail. For some users, particularly those using older protocols or configurations, other server names like imap-mail.outlook.com or pop-mail.outlook.com (for incoming) and smtp-mail.outlook.com (for outgoing) might be used.

What are the incoming connections to this System?

Receiving emails

What are the outgoing connections from this System?

Sending emails

What type of site is this?

System

What is the name of the System?

Local Workstation

What is the sensitivity of the System?

Federal Tax Information (FTI)

Please provide a brief description of the System.

This is the local machine that is authorized to access the automation.

What are the incoming connections to this System?

The user credentials are using to log into the mail server to access the Microsoft Outlook profile.

What are the outgoing connections from this System?

The email attachments are downloaded from the mail server to the local drive specified by the user.

What type of site is this?

OneDrive

What is the name of the OneDrive?

Local User OneDrive

What is the sensitivity of the OneDrive?

Federal Tax Information (FTI)

Please provide a brief description of the OneDrive.

This is the local machine OneDrive that presented an option to download for the user who is authorized to access the automation.

What are the incoming connections to this OneDrive?

The user credentials are using to log into the mail server to access the Microsoft Outlook profile.

What are the outgoing connections from this OneDrive?

The email attachments are downloaded from the mail server to the local drive specified by the user.