

Date of Approval: 12/23/2024  
Questionnaire Number: 1863

## Basic Information/Executive Summary

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

Thomson Reuters (TR) GoSystem

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 Joint Enterprise Tax Calculator System (JETCS) is an advanced platform developed to enhance the IRS's capability in processing and managing complex tax calculations. The system integrates and orchestrates tax calculation functions across various IRS domains, including intake, compliance, and case management, by leveraging modernized data sources and sophisticated Application Programming Interfaces (APIs). The primary reason for JETCS is to streamline and automate tax liability computations, including calculations for penalties and interest, to improve accuracy, efficiency, and compliance within the IRS. By providing precise and timely tax calculations, JETCS supports the IRS's strategic goals of empowering taxpayers, safeguarding the integrity of the tax system, and advancing data usability and analytics. The system facilitates the seamless handling of tax return data, adjustments, and penalty assessments, thereby reducing technical debt and operational complexity. The benefits to the IRS include increased agility in processing tax returns, enhanced accuracy in penalty and interest calculations, and a more effective approach to managing taxpayer

compliance. The information generated by JETCS is used to make informed decisions on tax liabilities, assess and enforce penalties, and calculate interest, ultimately contributing to a more efficient, secure, and reliable tax administration. Thomson Reuters (TR) GoSystem is a Software as a service (SaaS) outside of the IRS environment that provides a tax calculator service to the IRS through the JETCS program. JETCS aims to establish open, common services for the IRS, enabling seamless orchestration and integration to deliver complex tax calculations across a diverse IRS IT ecosystem in support of multiple domains (intake, compliance, case management, etc.), programs and platforms (Pega Systems, Salesforce, etc.). Delivered incrementally under the Enterprise Case Management (ECM) umbrella and its integration with an ecosystem of tax calculator externally provided services, JETCS will support key milestones under IRA, ultimately transforming the IRS's tax calculation processes. TR GoSystem is an external calculation engine which will perform the necessary tax calculations only, all PII is stripped before the data is transmitted from JETCS system ensuring that only sanitized and calculation relevant data flows through the system while maintaining strict privacy compliance. The TR GoSystem will be used to perform tax calculations and therefore receives Federal Tax Information (FTI) which is Adjusted Gross Income (AGI) only to perform the necessary tax calculations. TR GoSystem does not store AGI data permanently. Instead, it retrieves AGI for calculations, processes the required tax computations, and then securely transmits the results, including AGI-based calculations, back to the JETCS. This approach ensures data privacy and compliance, as the AGI is only used temporarily during the calculation process without long-term storage.

## **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).

TR GoSystem is an external calculation engine which will perform the necessary tax calculations only, all PII is stripped before the data is transmitted from JETCS system ensuring that only sanitized and calculation relevant data flows through the system while maintaining strict privacy compliance. TR GoSystem will be used to perform tax calculations and therefore receives FTI which is Adjusted Gross Income (AGI) only to perform the necessary tax calculations. TR GoSystem does not store AGI data permanently. Instead, it retrieves AGI for calculations, processes the required tax computations, and then securely transmits the results, including AGI-based calculations, back to the JETCS. This approach ensures data privacy and compliance, as the AGI is only used temporarily during

the calculation process without long-term storage. In addition, audit logs that will be sent from Splunk to the Enterprise Security Audit Trails (ESAT) team which will include API activities which will capture date, time, source address (IP address) and endpoint activity. Attached is the log file for review.

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

Federal Tax Information (FTI)  
Internet Protocol Address (IP Address)

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

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

## Product Information (Questions)

1 Is this a new system?

Yes

2 What is the name of the contractor?

Thompson Reuters

3 Please provide a contact person for the contractor.

XXXXXXXXXXXX

4 Please provide the phone number for the contractor.

XXXXXXXXXXXX

5 What is the email address for the contractor?

XXXXXXXXXXXX

6 What is the address for the contractor?

XXXXXXXXXXXX

7 What is the location of the contractor?

XXXXXXXXXXXX

8 What is the contract number?

2032H5-24-C-00051

9 What is the length of the contract?

5 months

10 What is the contract start date?

7/14/2024

11 What is the contract end date?

12/31/2024

12 What is the Contracting Officer (CO) name?

XXXXXXXXXXXX

13 What is the CO's email address?

XXXXXXXXXXXX

14 What is the CO's phone number?

XXXXXXXXXXXX

15 Who is the Contracting Officer's Representative (COR)?

XXXXXXXXXXXX

16 What is the COR's email address?

XXXXXXXXXXXX

17 What is the COR's phone number?

XXXXXXXXXXXX

18 What is the IRS business unit procuring the contract?

Information Technology

19 What is the business owner contact name?

XXXXXXXXXXXX

20 How is access to the SBU/PII determined and by whom?

Not Applicable - The TR GoSystem will be used to perform tax calculations and therefore receives FTI which is Adjusted Gross Income (AGI) only to perform the necessary tax calculations. The TR GoSystem does not store AGI data permanently. Instead, it retrieves AGI for calculations, processes the required tax computations, and then securely transmits the results, including AGI-based calculations, back to the JETCS and the session is cleared. This approach ensures data privacy and compliance, as the AGI is only used temporarily during the calculation process without long-term storage.

21 Are any authorized employees approved for telework?

No

22 Describe the work to be performed, how PII will be used, collected, received, displayed, stored, maintained, or disseminated.

Not Applicable - The TR GoSystem will be used to perform tax calculations and therefore receives FTI which is Adjusted Gross Income (AGI) only to perform the

necessary tax calculations. The TR GoSystem does not store AGI data permanently. Instead, it retrieves AGI for calculations, processes the required tax computations, and then securely transmits the results, including AGI-based calculations, back to the JETCS and the session is cleared. This approach ensures data privacy and compliance, as the AGI is only used temporarily during the calculation process without long-term storage. The calculation services are performed through API calls only.

23 Provide a clear, concise reason why the contractor will use the PII, the benefit to IRS, and how the information will be used.

Not Applicable - The TR GoSystem will be used to perform tax calculations and therefore receives FTI which is Adjusted Gross Income (AGI) only to perform the necessary tax calculations. The TR GoSystem does not store AGI data permanently. Instead, it retrieves AGI for calculations, processes the required tax computations, and then securely transmits the results, including AGI-based calculations, back to the JETCS and the session is cleared. This approach ensures data privacy and compliance, as the AGI is only used temporarily during the calculation process without long-term storage.

24 Please indicate the location where the work will be performed, and how the data will be processed, stored, and secured.

The TR GoSystem will be used to perform tax calculations and therefore receives FTI, which is Adjusted Gross Income (AGI) only to perform the necessary tax calculations. The TR GoSystem does not store AGI data permanently. Instead, it retrieves AGI for calculations, processes the required tax computations, and then securely transmits the results, including AGI-based calculations, back to the JETCS and the session is cleared. This approach ensures data privacy and compliance, as the AGI is only used temporarily during the calculation process without long-term storage.

25 Is any data accessed, processed and/or stored outside the United States or US Territories?

No

26 Describe the procedures for agency oversight on contractor, access, storage, and destruction of PII, disclosure awareness training and incident reporting.

The TR SaaS GoSystem has no IRS users accessing the system directly, it is leveraged through API calls from the JETCS JIOS system who in turn is triggered by ECM thereby there are no user roles for the system nor is there any access to PII by a user.

27 If applicable, what is the IRS PCLIA Number for the system that is providing the information associated with this contract?

1590

28 Are you receiving only the data that is needed to accomplish the task?  
Yes

30 Do you have subcontractors who work on the contract?  
No

31 Does this system use Artificial Intelligence (AI)?  
No

32 Does the system use cloud computing?  
Yes

32.1 Please identify the Cloud Service Provider (CSP).  
Thomson Reuters (SaaS)

32.3 Privacy laws (including access and ownership) can differ in other countries. Does the data physically reside in systems located in the United States and its territories and is all access and support of this system performed from within the United States and its territories?  
Yes

33 Who owns and operates the system (IRS Owned and Contractor Operated, Contractor Owned and Operated)?  
Contractor owned and operated

34 Identify the roles and their access level to the PII data. Indicate whether background investigations are complete or not.  
There are no roles that will be accessing PII data as the TR GoSystem SaaS services is used via API calls only.

34.1 Has the system been through Security Assessment and Authorization (SA&A) or Annual Security Control Assessment (ASCA)?  
Yes

35 Describe the system's audit trail in detail.  
Logs are provided to the IRS via secure APIs and cloud-to-cloud integration mechanisms, ensuring real-time and historical log data transfer through encrypted channels. Logs are submitted in attachments.

36 Does this system use, or plan to use SBU Data in a non-production environment?  
No

# Interfaces

## Interface Type

IRS or Treasury Contractor

## Agency Name

Thompson Reuters

## Incoming/Outgoing

Both

## Transfer Method

Other

## Other Transfer Method

Application Programming Interface (API)

# Systems of Records Notices (SORNs)

## SORN Number & Name

IRS 34.037 - Audit Trail and Security Records

Describe the IRS use and relevance of this SORN.

ESAT Splunk Logs

# Records Retention

What is the Record Schedule System?

Non-Record

# Data Locations

What type of site is this?

System

What is the name of the System?

JETCS

What is the sensitivity of the System?

Federal Tax Information (FTI)

Please provide a brief description of the System.

The Joint Enterprise Tax Calculator System (JETCS) is an advanced platform developed to enhance the IRS's capability in processing and managing complex tax calculations. The system integrates and orchestrates tax calculation functions across various IRS domains, including intake, compliance, and case management, by leveraging modernized data sources and sophisticated APIs.

The primary reason for JETCS is to streamline and automate tax liability computations, including calculations for penalties and interest, to improve accuracy, efficiency, and compliance within the IRS.

What are the incoming connections to this System?

The JETCS dataset will include adjusted gross income (AGI) during a stateful connection between ECM and JIOS and its integration with TR GoSystem (SaaS) tax calculator. The JETCS system does not communicate directly with taxpayers or employers. JETCS receives tax return information through an ECM request for a tax calculation and JETCS provides a tax calculation response for that request.

What are the outgoing connections from this System?

The business logic remains in JETCS, while the tax calculation is provided by TR GoSystem. A fake Taxpayer Identification Number (TIN) is sent to the TR GoSystem, and no other data is sent in the payload for identification purposes, only for calculation purposes. The FTI data that is sent is adjusted gross income (AGI).