

Date of Approval: 05/07/2026
Questionnaire Number: 2666

Basic Information/Executive Summary

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

Individual Master File

Acronym:
IMF

Business Unit
Taxpayer Services

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.

Individual Master File (IMF) is a Taxpayer Services owned application and is a core IRS tax processing system that stores and manages individual taxpayer account records. It also tracks tax returns, payments, refunds, and adjustments for individuals. IMF operates on the Zero-downtime Operating System (z/OS) mainframe operating system to perform Tax data processing, collection processing, and other functions that directly supports the IRS mission. IMF consists of a compilation of batch programs with no direct user interaction. IMF data are stored in the Integrated Data Retrieval System (IDRS). IRS System administrators, developers, and contractors access IMF through the Resource Access Control Facility (RACF). As needed, personnel request data extracts by submitting a work request, or authorized users can access information through Integrated Data Retrieval System (IDRS) using various command codes for

enforcement, compliance, legislative, research, and downstream processing purposes.

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).

IMF receives individual tax submissions in electronic format and processes them through a pre-posting phase, posts the transactions, and analyzes the transactions. These transactions are initiated either automatically or can be input by an IRS employee, and IMF processes them during nightly batch runs to update the master file. IMF then produces output in the form of Refund Data, Notice Data, Reports, and information feeds to other entities. IMF is not an official system of record for the data contained therein. IMF data is stored on the International Business Machine (IBM) Mainframe, which audits all access to the data and the code used to process the data. IMF data is approved for deletion/destruction 30 years after end of processing year. These disposition instructions are published in Document 12990 under Records Control Schedule (RCS) 29: Tax Administration - Wage and Investment Records.

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

Address

Adoption Taxpayer Identification Number

Criminal Investigation Information

Document Locator Number (DLN)

Employer Identification Number

Family Members

Federal Tax Information (FTI)

Financial Account Number

Individual Taxpayer Identification Number (ITIN)

Language

Name

Other

Preparer Taxpayer Identification Number (PTIN)

Social Security Number (including masked or last four digits)

Standard Employee Identifier (SEID)

Tax ID Number

Telephone Numbers

Please explain the other type(s) of PII that this project uses.

USER Identification (ID), Protection Personal Identification Numbers (IP PIN),
and Centralized Authorization File (CAF), Date of Birth

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

PII for federal tax administration - generally IRC Sections 6001 6011 or 6012
SSN for tax returns and return information - IRC section 6109

Product Information (Questions)

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

No

2 What type of project is this (system, project, application, database, pilot/proof of concept/prototype, power platform/visualization tool)?

Application

3 What Tier designation has been applied to your system? (Number)

1

4 Is this a new system?

No

4.1 Is there a previous Privacy and Civil Liberties Impact Assessment (PCLIA) for this project?

Yes

4.11 What is the previous PCLIA number?

7483

4.12 What is the previous PCLIA title (system name)?

Individual Master File, IMF

4.2 You have indicated this is not a new system; explain what has or will change and why. (Expiring PCLIA, changes to the PII or use of the PII, etc.)

Expiring PCLIA, updates to information retained in audit logs

5 Is this system considered a child system/application to another (parent) system?

No

6 Indicate what OneSDLC State is the system in (Allocation, Readiness, Execution) or indicate if you go through Information Technology's (IT) Technical Insertion Process and what stage you have progressed to.

Execution

7 Is this a change resulting from the OneSDLC process?

No

8 Please provide the full name and acronym of the governance board or Executive Steering Committee (ESC) this system reports to.

Modernization and Sustaining Operations (MSO)

9 If the system is on the As-Built-Architecture (ABA), what is the ABA ID number of the system? If this PCLIA covers multiple applications shown on the ABA, please indicate the ABA ID number(s) for each application covered separated by a comma. If the system is not in the ABA, then contact the ABA (<https://ea.web.irs.gov/aba/index.html>) for assistance.

210599

10 Does this system disclose any PII to any third party outside the IRS?

Yes

10.1 Does the system have a process in place to account for such disclosures in compliance with IRC 6103(p)(3)(A) or Subsection c of the Privacy Act?

Yes

11 Does your project/system involve any use of artificial intelligence (AI), including virtual assistant, chat bot, and robotic process automation, as defined in Executive Order 13960 and 14110?

No

12 Does this system use cloud computing?

No

13 Does this system/application interact with the public?

No

14 Describe the business process allowing an individual to access or correct their information. (Due Process)

IMF is a transactional batch driven application and is not an official system of record for individual tax data. It does not have a public interface or end users. Individuals seeking access to any record contained in an IRS system of records, or seeking to contest its content, may inquire in accordance with instructions appearing at 31 CFR part 1, subpart C, appendix B. Disclosure of returns and return information may be made only as provided by 26 U.S.C. 6103. See SORNs

IRS 22.032 and IRS 24.030. Authorized individuals could access limited information by calling the IRS, signing on to an individual online account (IOLA), requesting a transcript, etc. An individual can correct their individual tax information by filing an amended form, name change form, etc. Instructions for filing each of these forms can be found on IRS.gov. Employee information on audit logs may not be accessed for purposes of inspection or in order to contest the content of records; the records are exempt under 5 U.S.C. 552a(k)(2). See SORN IRS 34.037.

15 Is this system owned and/or operated by a contractor?

No

16 Identify what role(s) the IRS and/or the contractor(s) performs; indicate what access level (to this system's PII data) each role is entitled to. (Include details about completion status and level of access of the contractor's background investigation was approved for.)

IRS System Administrators - Read and Write

IRS Developers - Read and Write

Contractor Developers - Read and Write with Moderate background investigation level

17 The Privacy Act of 1974 (5 USC § 552a(e)(3)) requires each agency that maintains a system of records, to inform each individual requested to supply information about himself or herself. Please provide the Privacy Act Statement presented by your system or indicate a Privacy Act Statement is not used and individuals are not given the opportunity to consent to the collection of their PII.

Individuals providing information do so through a tax form, which has a Disclosure, Privacy Act, and Paperwork Reduction Act Notice in the instructions. For example, Form 1040 2024 states: The IRS Restructuring and Reform Act of 1998, the Privacy Act of 1974, and the Paperwork Reduction Act of 1980 require that when we ask you for information we must first tell you our legal right to ask for the information, why we are asking for it, and how it will be used. We must also tell you what could happen if we do not receive it and whether your response is voluntary, required to obtain a benefit, or mandatory under the law. This notice applies to all records and other material (in paper or electronic format) you file with us, including this tax return. It also applies to any questions we need to ask you so we can complete, correct, or process your return; figure your tax; and collect tax, interest, or penalties. Our legal right to ask for information is Internal Revenue Code sections 6001, 6011, and 6012(a), and their regulations. They say that you must file a return or statement with us for any tax you are liable for. Your response is mandatory under these sections. Code section 6109 re-quires you to provide your identifying number on the return. This is so we know who you are and can process your return and other papers. You must fill in all parts of the tax form that apply to you. But you do not have to check the boxes for the Presidential Election Campaign Fund or for the third-party designation. You also do not have to provide your daytime phone number or email address. You are not required to provide the information requested on a form that is subject to the

Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. We ask for tax return information to carry out the tax laws of the United States. We need it to figure and collect the right amount of tax. If you do not file a return, do not provide the information we ask for, or provide fraudulent information, you may be charged penalties and be subject to criminal prosecution. We may also have to dis-allow the exemptions, exclusions, credits, deductions, or adjustments shown on the tax return. This could make the tax higher or delay any refund. Interest may also be charged. Generally, tax returns and return information are confidential, as stated in Code section 6103. However, Code section 6103 allows or requires the Internal Revenue Service to disclose or give the information shown on your tax return to others as described in the Code. For example, we may disclose your tax information to the Department of Justice to enforce the tax laws, both civil and criminal, and to cities, states, the District of Columbia, and U.S. commonwealths or territories to carry out their tax laws. We may disclose your tax information to the Department of Treasury and contractors for tax administration purposes; and to other people as necessary to obtain information needed to determine the amount of or to collect the tax you owe. We may disclose your tax information to the Comptroller General of the United States to permit the Comptroller General to review the Internal Revenue Service. We may disclose your tax information to committees of Congress; federal, state, and local child support agencies; and to other federal agencies for the purpose of determining entitlement for benefits or the eligibility for and the repayment of loans. We may also disclose this information to other countries under a tax treaty, to federal and state agencies to enforce federal nontax criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism. Please keep this notice with your records. It may help you if we ask you for other information. If you have questions about the rules for filing and giving information, please call or visit any Internal Revenue Service office.

18 How many records in the system are attributable to IRS Employees? Enter "Under 50,000", "50,000 to 100,000", "More than 100,000" or "Not Applicable".

Not Applicable

19 How many records in the system are attributable to contractors? Enter "Under 5,000", "5,000 to 10,000", "More than 10,000" or "Not Applicable".

Under 5,000

20 How many records in the system are attributable to members of the public? Enter "Under 100,000", "100,000 to 1,000,000", "More than 1,000,000" or "Not applicable".

More than 1,000,000

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

Resource Access Control Facility (RACF) and Role-Based Access Control (RBAC) Rules, all those with access must go through the Public Trust Clearance

process before access is considered. Once cleared, they must complete the proper request forms before access to IMF is obtained. All access must be approved by the user's manager who reviews the access request form at the time of submission and on an annual basis. The system administrators/approvers will also verify group membership to ensure system rights are limited based on the employee or contractor's need-to-know in order to perform their official duties. For access to an environment where a new or modified system is being tested (i.e., a non-production supporting environment) users must complete the necessary SBU data training, complete an access request form, and in some cases as outlined by the requirements set forth within the Internal Revenue Manual (IRM), submit an elevated access letter that is approved by the Associate Chief Information Officer prior to granting access. Access to the data is determined by the manager based on a user's position and need-to-know. The manager will request a user to be added. They must submit the request via the Business Entitlement Access Request (BEARS) process to request access to the System.

23 Is there a data dictionary on file for this system? Note: Selecting "Yes" indicates an upload to the Attachment Section is required.

No

24 Explain any privacy and civil liberties risks related to privacy controls.

IMF is monitoring 2 Privacy risks. IPT0026300 (RA-08) Privacy Impact Assessment; SORN for audit logging IPT0026299 (AU-03(3) AU-3(03) Content of Audit Records | Limit Personally Identifiable Information Elements.

25 Please upload all privacy risk finding documents identified for the system (Audit trail, RAFT, POA&M, Breach Plan, etc.); click "yes" to confirm upload(s) are complete.

Yes

26 Describe this system's audit trail in detail. Provide supporting documents.

Audit logs are managed at the Enterprise Operations level and are collected at the Mainframe level and sent to SPLUNK.

27 Does this system use or plan to use SBU data in a non-production environment?

Yes

27.1 Please upload the Approved Email and one of the following SBU Data Use Forms, Questionnaire (F14664) or Request (F14665) or the approved Recertification (F14659). Select Yes to indicate that you will upload the Approval email and one of the SBU Data Use forms.

Yes

Interfaces

Interface Type

IRS Systems, file, or database

Agency Name

Consolidated Annual Tax Reporting System (CATRS)

Incoming/Outgoing

Outgoing (Sending)

Transfer Method

Other

Other Transfer Method

via network

Interface Type

Other Federal Agencies

Agency Name

US Census Bureau

Incoming/Outgoing

Both

Transfer Method

Other

Other Transfer Method

Memorandum Of Agreement Between the U.S. Census Bureau and Internal Revenue Service Regarding Confidentiality and Disclosure Protection of Federal Tax Information - signed 2023.08.22 IMF forwards taxpayer information, such as outstanding federal liabilities and information discrepancies between employer wage reports and tax returns, to these external connections. To ensure the integrity and confidentiality of the exported information, the Connect:Direct mechanism is used to encrypt the data flow. Connect:Direct is a point-to-point file transfer software tool used for optimizing high-volume, secure, assured delivery of files among enterprises. Connect:Direct is compliant with Federal Information Processing Standard FIPS-140-2.

Interface Type

IRS Systems, file, or database

Agency Name

Customer Account Data Engine 2 (CADE2)

Incoming/Outgoing

Both

Transfer Method

Other

Other Transfer Method

CADE2 reads the files from the mainframe. The IMF files reside on the same platform/tier making the data available to CADE2. There is no formal process in sending files.

Interface Type

IRS Systems, file, or database

Agency Name

GSS-17 (Main) | Enterprise Systems Domain

Incoming/Outgoing

Incoming (Receiving)

Transfer Method

Other

Other Transfer Method

via network

Interface Type

IRS Systems, file, or database

Agency Name

Electronic Federal Payment Posting System (EFPPS)

Incoming/Outgoing

Outgoing (Sending)

Transfer Method

Electronic File Transfer Utility (EFTU)

Other Transfer Method

via network

Interface Type

IRS Systems, file, or database

Agency Name

Federal Unemployment Tax Act -Consolidated

Incoming/Outgoing

Both

Transfer Method

Other

Other Transfer Method

via network

Interface Type

Other Federal Agencies

Agency Name

Government Accountability Office (GAO)

Incoming/Outgoing

Outgoing (Sending)

Transfer Method

Other

Other Transfer Method

Audit oversight, Title II Section 208 of the EGovernment Act of 2002

Interface Type

IRS Systems, file, or database

Agency Name

GSS-21 (Main) | IBM Mainframe Platform|z/Operating System

Incoming/Outgoing

Both

Transfer Method

Other

Other Transfer Method

via network

Interface Type

Other Federal Agencies

Agency Name

US Department of Health and Human Services; Social Security Administration

Incoming/Outgoing

Both

Transfer Method

Other

Other Transfer Method

It is the intent of all parties to this agreement to provide a secure Virtual Private Network (VPN) connection between the Social Security Administration (SSA), Internal Revenue Service (IRS), and the Office of Child Support Services (OCSS) in the Department of Health and Human Services' (HHS). This connection will be used for transmitting data files from the SSA and OCSS to IRS, and IRS to SSA and OCSS. The IRS routinely exchanges files with SSA. These files are transferred using Connect:Direct, an application that supports reliable delivery and interfaces with the RACF mainframe security product to control use of Connect:Direct functions.

Interface Type

IRS Systems, file, or database

Agency Name

Compliance Data Environment (CDE)

Incoming/Outgoing

Outgoing (Sending)

Transfer Method
Other
Other Transfer Method
via network

Interface Type
IRS Systems, file, or database
Agency Name
Return Review Program (RRP)
Incoming/Outgoing
Both
Transfer Method
Other
Other Transfer Method
via network

Interface Type
IRS Systems, file, or database
Agency Name
Taxpayer Index File (TIF)
Incoming/Outgoing
Both
Transfer Method
Other
Other Transfer Method
The files are sent via Connect:Direct daily.

Interface Type
IRS Systems, file, or database
Agency Name
National Account Profile (NAP)
Incoming/Outgoing
Outgoing (Sending)
Transfer Method
Other
Other Transfer Method
via network

Interface Type
Other Federal Agencies
Agency Name
Treasury Inspector General for Tax Administration (TIGTA)
Incoming/Outgoing
Outgoing (Sending)

Transfer Method

Other

Other Transfer Method

Audit oversight, Title II Section 208 of the EGovernment Act of 2002

Interface Type

IRS Systems, file, or database

Agency Name

GSS-21 | z/Transaction Processing Facility (TPF) Operating System

Incoming/Outgoing

Outgoing (Sending)

Transfer Method

Other

Other Transfer Method

via network

Interface Type

IRS Systems, file, or database

Agency Name

Generalized Mainline Framework (GMF)

Incoming/Outgoing

Both

Transfer Method

Secure File Transfer Protocol (SFTP)

Interface Type

IRS Systems, file, or database

Agency Name

Financial Management Information System

Incoming/Outgoing

Outgoing (Sending)

Transfer Method

Other

Other Transfer Method

via Network

Interface Type

IRS Systems, file, or database

Agency Name

Automated Liens System and Entity Case Management System (ALSEntity)

Incoming/Outgoing

Outgoing (Sending)

Transfer Method

Electronic File Transfer Utility (EFTU)

Other Transfer Method

IMF sends one file weekly from 780-85 via EFTU.

Interface Type

IRS Systems, file, or database

Agency Name

Notice Review Processing System (NRPS)

Incoming/Outgoing

Outgoing (Sending)

Transfer Method

Other

Other Transfer Method

via network

Interface Type

IRS Systems, file, or database

Agency Name

Generalized Unpostable Framework (GUF)

Incoming/Outgoing

Outgoing (Sending)

Transfer Method

Secure File Transfer Protocol (SFTP)

Other Transfer Method

via network

Interface Type

IRS Systems, file, or database

Agency Name

Audit Information Management System (AIMS)

Incoming/Outgoing

Both

Transfer Method

Other

Other Transfer Method

via network

Interface Type

IRS Systems, file, or database

Agency Name

Return Review Program Legacy Components (RRPLC)

Incoming/Outgoing

Both

Transfer Method
Other
Other Transfer Method
via network

Interface Type
IRS Systems, file, or database
Agency Name
Notice Delivery System (NDS)
Incoming/Outgoing
Outgoing (Sending)
Transfer Method
Other
Other Transfer Method
via network

Interface Type
IRS Systems, file, or database
Agency Name
Statistics of Income Distributed Processing System (SOIDPS)
Incoming/Outgoing
Outgoing (Sending)
Transfer Method
Other
Other Transfer Method
via network

Interface Type
IRS Systems, file, or database
Agency Name
Automated Underreporter (AUR)
Incoming/Outgoing
Both
Transfer Method
Electronic File Transfer Utility (EFTU)
Other Transfer Method
via network

Interface Type
IRS Systems, file, or database
Agency Name
Enforcement Revenue Information System (ERIS)
Incoming/Outgoing
Outgoing (Sending)

Transfer Method

Other

Other Transfer Method

Run 780-93 sends Enforcement Revenue Information System (ERIS) Taxpayer Information File(s) (TIF) sections daily via Connect:Direct.

Interface Type

IRS Systems, file, or database

Agency Name

Secure Access Digital Identity (SADI)

Incoming/Outgoing

Both

Transfer Method

Other

Other Transfer Method

via network

Interface Type

IRS Systems, file, or database

Agency Name

Refund Information File (RFIF)

Incoming/Outgoing

Outgoing (Sending)

Transfer Method

Electronic File Transfer Utility (EFTU)

Other Transfer Method

via network

Interface Type

Other Federal Agencies

Agency Name

US Department of the Treasury Bureau of the Fiscal Service
Treasury Web Application Infrastructure

Incoming/Outgoing

Both

Transfer Method

Other

Other Transfer Method

Once network connectivity has been established, the Two Wire Automotive Interface (TWAI) supports the file transfer applications presented below. These applications run on dedicated file servers on a Unix platform. 3.5.1.1 IBM Connect:Direct
Connect: Direct without Secure+ uses a proprietary file transfer protocol. Once the files have been transferred from the business

partner, a batch job moves these files to the application servers as per the application requirement. There are instances when the file server and the application server share the same volume on the Storage Area Network (SAN), in which case, a Java Messaging Service (JMS) event is sent to the application servers which in turn processes the files. Connect:Direct Secure+ uses encryption on top of the proprietary file transfer protocol. 3.5.1.2 Axway's SecureTransport uses Hypertext Transfer Protocol Secure (HTTPS) for file transfer. Similar to Connect:Direct, a batch job moves the files to the application servers. 3.5.1.3 Two Wire Automotive Interface (TWAI) Virtual Private Network (VPN) Information All of the Two Wire Automotive Interface (TWAI) environments have Cisco Virtual Private Network (VPN) devices. Quality Assurance (QA) and both production environments have two (2) Cisco Virtual Private Networks (VPNs) for redundancy purposes. They are configured with Virtual Router Redundancy Protocol (VRRP) and therefore require the Two Wire Automotive Interface (TWAI) to only provide one Virtual Private Network (VPN) IP address per environment to the business partners.

Interface Type

IRS Systems, file, or database

Agency Name

Withholding Compliance System (WHCS)

Incoming/Outgoing

Both

Transfer Method

Other

Other Transfer Method

via network

Interface Type

IRS Systems, file, or database

Agency Name

SPLUNK

Incoming/Outgoing

Outgoing (Sending)

Transfer Method

Other

Other Transfer Method

via Network

Interface Type

IRS Systems, file, or database

Agency Name

Integrated Data Retrieval System (IDRS)

Incoming/Outgoing

Both

Transfer Method

Other

Other Transfer Method

via network - Integrated Data Retrieval System (IDRS) is identified as a data location because data from Individual Master File (IMF) is extracted to Integrated Data Retrieval System (IDRS) for the purpose of viewing case statuses and transaction processed by Individual Master File (IMF). In addition, Integrated Data Retrieval System (IDRS) also serves as an interface, enabling transactions to be input into Individual Master File (IMF). This dual functionality is the reason Integrated Data Retrieval System (IDRS) appears in both sections.

Interface Type

IRS Systems, file, or database

Agency Name

Tax Account Management Services (TAMS)

Incoming/Outgoing

Incoming (Receiving)

Transfer Method

Other

Other Transfer Method

via Network; Application Programming Interface (API)

Interface Type

IRS Systems, file, or database

Agency Name

Correspondence Examination Automation Support (CEAS)

Incoming/Outgoing

Outgoing (Sending)

Transfer Method

Other

Other Transfer Method

via network

Interface Type

IRS Systems, file, or database

Agency Name

Entity Case Management System (ECMS)

Incoming/Outgoing

Incoming (Receiving)

Transfer Method
Other
Other Transfer Method
via network

Interface Type
IRS Systems, file, or database
Agency Name
Research, Analysis and Statistics 1(Main)
Incoming/Outgoing
Both
Transfer Method
Other
Other Transfer Method
via Network

Interface Type
Other Federal Agencies
Agency Name
US Department of the Treasury Bureau of the Fiscal Service
Incoming/Outgoing
Incoming (Receiving)
Transfer Method
Other
Other Transfer Method
The interconnection will be established using approved communications protocols, data transfer capabilities, specific communications hardware, and encryption requirements to establish a secure connection to Fiscal Service networks.

Systems of Records Notices (SORNs)

SORN Number & Name
IRS 24.030 - Customer Account Data Engine Individual Master File
Describe the IRS use and relevance of this SORN.
IMF sends data records for tax returns, return transactions, and authorized taxpayer representatives for individuals who file Federal Individual Income Tax Returns to CADE2 for storage.

SORN Number & Name

IRS 34.037 - Audit Trail and Security Records

Describe the IRS use and relevance of this SORN.

IMF utilizes this SORN for auditing purposes which will identify and track any unauthorized accesses to sensitive but unclassified information and potential breaches or unauthorized disclosures of such information or inappropriate use of government computers to access Internet sites for any purpose forbidden by IRS policy (e.g., gambling, playing computer games, or engaging in illegal activity), or to detect electronic communications sent using IRS systems in violation of IRS security policy.

SORN Number & Name

IRS 22.032 - Individual Microfilm Retention Register

Describe the IRS use and relevance of this SORN.

IMF utilizes this SORN for archive purpose. Individual Tax Account information is Archived for any Retrieval as needed for auditing.

Records Retention

What is the Record Schedule System?

Record Control Schedule (RCS)

What is the retention series title?

Taxpayer Services 29

What is the GRS/RCS Item Number?

45

What type of Records is this for?

Electronic

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

IMF Retention Register. Record copy containing all entity and tax modules archived from the master file.

What is the disposition schedule?

AUTHORIZED DISPOSITION Retire to the Records Center after 2 years. Destroy 30 years after the end of the processing year. Final disposition date is 2038

What is the Record Schedule System?

General Record Schedule (GRS)

What is the retention series title?

3.2: Information Systems Security Records

What is the GRS/RCS Item Number?

031

What type of Records is this for?

Electronic

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

System access records. These records are created as part of the user identification and authorization process to gain access to systems.

What is the disposition schedule?

Temporary. Destroy 6 years after password is altered or user account is terminated, 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?

Integrated Data Retrieval System (IDRS)

What is the sensitivity of the System?

Federal Tax Information (FTI)

Please provide a brief description of the System.

Integrated Data Retrieval System Modernization Initiative (IDRS MOD) is a modernization effort that employs a “like-to-like” Artificial Intelligence (AI)-driven code transformation strategy to achieve feature and performance parity between the legacy and modernized systems. This approach uses automated code discovery tools to inventory and analyze the existing application, document its architecture, assess dependencies, and develop a transformation blueprint. The AI-driven transformation process will convert Common Business Oriented Language (COBOL) code to Java, migrate Data Management System (DMS) 2200 databases to relational datastores, and transform green-screen interfaces into browser-based graphical user interfaces that closely match the current application’s workflows and appearance. This methodology will minimize disruption by preserving established business processes, minimizing the costly and time-consuming extensive end-user retraining requirements through a modernized web browser Graphic User Interface (GUI) that closely mimics the current application’s look and feel, and enabling the reuse of existing test cases for functional validation.

What are the incoming connections to this System?

Individual Master File (IMF) receives incoming data from internal IRS systems that maintain taxpayer account information from Integrated Data Retrieval System (IDRS).

What are the outgoing connections from this System?

Individual Master File (IMF) sends processed data to Integrated Data Retrieval System (IDRS) by Taxpayer Information File (TIF).