Internal Revenue Service

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

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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 willimprove 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

> Source: (new B4-1) • The PWD participation rate (13.73%) exceeded the 12% benchmark for the grade cluster GS-1 to GS-10 so it is not a trigger. • The PWD participation rate (13.34%) 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

> Source: (new B4-1) The PWTD participation rate (3.68%) exceeded the 2% benchmark for the grade cluster GS-1 to GS-10 so it is not a trigger. The PWTD participation rate (2.86%) 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-1 to GS-10	48330	6636	13.73	1779	3.68
Grades GS-11 to SES	33562	4477	13.34	959	2.86

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 2022, 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 received mandatory Veteran Employment and Uniformed Services Employment and Reemployment Rights Act (USERRA) training to raise awareness of the special hiring authorities used to attract disabled veterans, including 30% or more disabled; Managers are also 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; Internal training on the Schedule A hiring authority was provided by the IRS Policy and Execution office in July of 2022; A staff of 15 employees were added to a new Special Emphasis Program Branch in the Strategic Talent Analytics and Recruitment Solutions (STARS) Department to focus on Persons with Disabilities (PWD) and Persons with Targeted Disabilities (PWTD) recruitment and staffing; The IRS' Veterans Outreach Program held planned activities to educate and serve the veteran workforce (including disabled veterans) on recruitment, hiring and retention. Lastly, the IRS conducted an employee resurvey campaign encouraging employees to voluntarily update their disability status information. The campaign ran from July 2022 through September 2022. At the beginning of the campaign (as of pay period 13 -FY 2022), the IRS had 80,328 permanent employees on the rolls of which 13.65% were PWD and 3.4% were PWTD. At the conclusion of the campaign (as of pay period 18 – FY 2022), the IRS had 81,982 permanent employees with 11.22% PWD and 3.35% PWTD. The overall total number of permanent employees increased by 1,654 but lowered the PWD percentage by 2.43%. The PWTD percentage also was reduced by .05% at the conclusion of the campaign. The Department is fully committed to supporting programs for the hiring, placement and advancement of people with disabilities and will continue to resurvey the workforce on a bi-annual basis to gather the critical information needed to assist in these efforts.

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	
Processing reasonable accommodation requests from applicants and employees	34	1	0	Elizabeth Flores-Velasquez, Associate Director, Disability Services Div, Office of Equity, Diversity and Inclusion (EDI) Elizabeth.A.Velasquez@irs.gov
Special Emphasis Program for PWD and PWTD	15	0	0	Christopher White, Branch Chief, Strategic Talent Analytics & Recruitment Solutions, Talent Acquisition Christopher.s.white@irs.gov Michael Sebastiani, Associate Director, Diversity & Inclusion Division, EDI michael.sebastiani@irs.gov
Architectural Barriers Act Compliance	0	0	315	Joseph J. Colaciello Program Manager, Facilities Management and Security Services (FMSS) Joseph.j.colaciello@irs.gov
Processing applications from PWD and PWTD	15	0	0	Christopher White, Branch Chief, Strategic Talent Analytics & Recruitment Solutions, Talent Acquisition Christopher.s.white@irs.gov
Answering questions from the public about hiring authorities that take disability into account	15	0	0	Christopher White, Branch Chief, Strategic Talent Analytics & Recruitment Solutions, Talent Acquisition Christopher.s.white@irs.gov
Section 508 Compliance	19	0	0	Maureen Goulder, Supervisory Supply Management Specialist, Wage and Investment Maureen.p.goulder@irs.gov Yolonda R. Humphrey, Supervisory IT Program Manager, Information Resources Accessibility Program Office yolonda.r.humphrey@irs.gov Robyn F. Luchau, HR Specialist, Talent Acquisition robyn.f.luchau@irs.gov

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.

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Answer   Yes

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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. In FY 2022, the IRS Reasonable Accommodations Coordinators (RAC's) received extensive training in Sign Language Interpreting (SLI) and Communication Access Realtime Translation (CART) Services in addition to briefings on Reasonable Accommodation Case Finding Decisions. Additionally, all newly hired RAC's are required to complete a comprehensive curriculum on RA training and receive "On the Job Instruction (OJI)" to successfully perform their duties. Furthermore, the IRS internal Integrated Talent Management (ITM) training system, which provides ongoing access to a wide range of topics covering a broad scope of disability protocol, non-competitive hiring authority regulations, and case processing is available for continued self-development.

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.

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Answer   No

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See MD-715, Part H. B.4

Section III: Program Deficiencies In The Disability Program

Brief Description of Program Deficiency	B.4.a.10. to effectively manage its reasonable accommodation program? [see 29 CFR §1614.203(d)(4)(ii)]		
Objective	To obtain exception hiring approval to fill critical vacancies to restore total EDI staffing levels based on the approved authorized staffing patterns in order to effectively manage its reasonable accommodation program (DSD).		
Target Date	Dec 1, 2022		
Completion Date	Nov 7, 2022		
	Target	**Completion Date**	**Planned Activity**
Planned Activities	Oct 31, 2022	Oct 13, 2022	Identify critical vacancies and submit listing to Chief of Staff requesting exception hiring approval.
	Dec 1, 2022	Nov 7, 2022	Reasonable Accommodation Coordinator vacancies -Implement pilot to bring on 10 collateral duty RACs.
	Dec 1, 2022	Nov 5, 2022	Reasonable Accommodation Coordinator vacancies -Announce and temporary fill RAC vacancies through 120 details.

Brief Description of Program Deficiency	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]		
Objective	To obtain exception hiring approval to fill critical vacancies to restore total EDI staffing levels based on the approved authorized staffing patterns in order to effectively administer IRS special emphasis programs (such as, Federal Women's Program, Hispanic Employment Program, and People with Disabilities Program Manager (DID).		
Target Date	Sep 30, 2023		
Completion Date			
	Target Date	**Completion Date**	**Planned Activity**
Planned Activities	Oct 31, 2022	Oct 13, 2022	Identify critical vacancies and submit listing to Chief of Staff requesting exception hiring approval.
	Mar 31, 2023		SEPM vacancies -Partner with Chief of Staff to recruit and permanently hire at least one SEPM.

Brief Description of Program Deficiency	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.		
Objective	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.		
Target Date	Sep 30, 2019		
Completion Date			
	Target	**Completion Date**	**Planned Activity**
	Jul 30, 2015	June 30, 2017	The Agency will expand the assessment of case cycle-time to include FY12 – FY 15 cases: a) identify where barriers to service delivery; b) evaluate the use of extenuating circumstance codes; and c) accurately define RA case processing timeframes. FY 16 will serve as a baseline year for testing the proposed measures, with continuous improvements being implemented in future years.

Planned Activities	Aug 1, 2015	May 30, 2015	The Agency will fully assess the Fiscal Year (FY) 14 RA closed case inventory by type to define RA timeliness measures to support the development of measures.
	Oct 1, 2015	July 30, 2015	The Agency will fully study the FY 14 closed RA inventory to identify cases meeting the current extenuating circumstances definition to specifically understand where barriers are to delivery.
	Feb 15, 2018	June 30, 2019	EDI will collaborate with the Human Capital Office (HCO) Automated Labor & Employee Relations Tracking System (ALERTS) database administrative team to initiate the identification and adding of new coding in the system to help address when various phases of the RA process cases should be suspended and to identify other inefficiencies.
	Apr 30, 2018	June 11, 2021	The Agency will implement the approved cycle-time and procedures recommended following: a) approval of recommended cycle-time changes internally and through Treasury and the Equal Employment Opportunity Commission (EEOC), b) training of personnel on the new procedures and cycle-time; c) notice to Labor Relations Strategy & Negotiations (LRSN) of the changes for notification to National Treasury Employee Union (NTEU); d) revision of IRM 1.20.2 and the National Agreement as necessary.
	Dec 10, 2018	Dec 7, 2018	The Agency will re-examine current RA procedures through a mapping and modeling process.
	Nov 15, 2019	June 11, 2021	Develop and implement a communications strategy to notify both managers, employees and strategic partners (FMSS), IT and IRAP) of the change in cycle timeframes.
	Dec 31, 2021		The agency will conduct an assessment of the reasonable accommodation process to identify opportunities to expedite decision making and fulfillment of RA needs, and implement any approved recommendation for enhancing the process.

Accomplishments	**Fiscal Year**	**Accomplishment**
	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.

Accomplishments	Fiscal Year	Accomplishment
	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 religiousnbeliefs 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.
	2020	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 implementationn 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

Accomplishments	Fiscal Year	Accomplishment
	2022	accommodation decision making and fulfilment 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 & 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.
	2021	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: • 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 violatedm applicable law. • 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. • 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. • Eliminated a provision authorizing a Deciding Official up to five days to provide written notice of a denial decision.

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. For example, the IRS Strategic Talent Analytics & Recruitment Solutions (STARS) utilizes the Schedule A noncompetitive hiring authority announcement specifically targeting PWD and PTWD as well as the disability special hiring path when advertising positions on USAJOBS. Other resources include membership in nation-wide employee organizations such as Deaf in Government (DIG), the IRS Employee Resource Group -Deaf Empowerment Advocacy Forum (DEAF), and workshop presentations at career fairs.

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 Service uses multiple non-competitive hiring authorities to appoint persons with disabilities to career conditional positions. The broadest authority, Schedule A, is open to all potential candidates who meet eligibility requirements. Eligible veterans are also identified using authorities addressing military service-connected disabilities such as 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.

The IRS routes the individuals' applications to the Employment Operations office where a specially trained HR specialist processes the applications (resumes). The HR specialists pre-qualifies applicants and refers them directly to the hiring officials. Applicants must provide a signed Schedule A letter and hiring managers are provided a certificate including qualified applicants eligible for selection. Based upon the results of the interviews, hiring managers select the most qualified candidate from the certificate. If/when management elects to fill a vacancy using non-competitive procedures, they are provided with qualified applicants from the repository. Proof of the disability is required for appointments of persons with disabilities, including intellectual, psychiatric and severe physical disabilities. Schedule A Certification must contain: an official organizational letterhead, a reference to 5 CFR 213 3129(u), and a physical signature of the signee (Computer generated signature signatures are not accepted). Managers may request resumes from persons with disabilities from the IRS Schedule A resume repository, or from a focused recruitment effort. HR qualifies promising resumes submitted for review via a hiring request through USA Staffing and forwards qualified applicants resumes to the hiring manager 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

Training is held on an ad hoc basis at the request of hiring managers and is included in the Strategic Talent Analytics & Recruitment Solutions (STARS) noncompetitive hiring options briefing. Hiring managers and analysts complete annual training in hiring veterans which includes specific information on the non-competitive authorities available, and the processes to hire disabled veterans. Hiring managers also receive additional information about hiring persons with disabilities in the manager curriculum. Information on Schedule A and Veteran Hiring Authorities are presented to new and existing members of the campus Submission Processing Recruitment Teams and IRS executives. Presentations emphasize 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 USA Staffing for non-competitive recruiting. The IRS published an internal article in March of FY22 entitled "Shared Services, EDI help with recruiting and hiring" in an effort to remind employees while recruiting for the most qualified applicants for vacant positions within their respective functions to consider diversity in all aspects of the process. Schedule A employment coordinators are provided training and encouraged to collaborate with

hiring managers on leveraging the Schedule A hiring authority for agency wide usage. This training covers legal use of the hiring authority, required documentation, how candidates are referred, and onboarding of these candidates.

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.

IRS collaborates with the Department of Veteran Affairs in targeting disabled veterans and with Department of Defense in providing internships for wounded service members transitioning from active duty. The IRS also 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. Additional contacts include the National Industries for the Blind and SourceAmerica for the purpose of promoting employment opportunities. The IRS points of contact encompass all 50 states including Washington, DC, the territories and over 696 rehabilitation services and agencies. In FY 2022, the USAJOBS Agency Talent Portal was used to recruit individuals with disabilities for jobs, resulting in 51 known applicants. Internally, the Local Accessibility Coordinator (LAC) program continues to serve as a vital resource to assist employees with disabilities in maintaining employment. Supporting IRS offices, such as the Information Resources Accessibility Program, Alternative Media Center, Information Technology, Learning & Education and W&I Integrated Talent Management work in partnership to provide field support to the LACs 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. In March of FY 2022, the IRS was involved with "A Seat at the Table Fair: DisABILITY, Multicultural and Military" at Georgia State University Career Fair. This discussion focused on efforts to support students with Disabilities, multicultural background, and military students. The IRS partners with Circa, DisabilityJobs. com, to post all vacancy announcements and engages organizations using the Circa platform (more than 27,00 diversity organizations). Additionally, the IRS hosts virtual information sessions with organizations to assist potential candidates on barriers they may encounter with entering the federal workforce. The IRS recruitment strategy involves identifying best practices and looking for partnering opportunities within the IRS 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 serve.

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   No

Source: (B8 or new B1) ¨ The PWD new hires rate (10.93%) was less than the 12% benchmark so it is a trigger. ¨ The PWTD new hires rate (2.02%) exceeded the 2% benchmark so it is not 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				

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 2022 submission. OCRE is hopeful that efforts made in FY 2023 will provide Treasury the opportunity to submit accurate Applicant Flow data and Part J responses for the FY 2023 report.

New Hires to Mission-Critical Occupations	Total #	Reportable Disability		Targeted Disability	
		Qualified Applicants (%)	New Hires (%)	Qualified Applicants (%)	New Hires (%)
Numarical 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

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 2022 submission. OCRE is hopeful that efforts made in FY 2023 will provide Treasury the opportunity to submit accurate Applicant Flow data and Part J responses for the FY 2023 report.

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 2022 submission. OCRE is hopeful that efforts made in FY 2023 will provide Treasury the opportunity to submit accurate Applicant Flow data and Part J responses for the FY 2023 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.

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). In addition, IRS has mentoring and coaching programs available to those interested in improving their skills, but it is not a competitive program, rather 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 to these opportunities. 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 various career development programs to support development for all employees 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). In addition, IRS has mentoring and coaching programs available to those interested in improving their skills, but it is not a competitive program, rather 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 to these opportunities. 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 various career development programs to support development for all employees 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) which are developed by employees and their managers

- 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	N/A	1098	N/A	11.96%	N/A	4.51%
Other Career Development Programs	194	57	31	12.28%	5	0%
Detail Programs	9045	525	1270	10.86%	136	.95%
Training Programs	N/A	N/A	N/A	N/A	N/A	N/A
Fellowship Programs	N/A	N/A	N/A	N/A	N/A	N/A
Coaching Programs	N/A	119	N/A	5.8%	N/A	3.36%
Internship Programs	N/A	352	N/A	11.36%	N/A	2.84%

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   Yes

     b.   Selections (PWD)   Answer   Yes

Internship Programs: There were 352 participants in various IRS Internship and Recent Grads programs; 40 (11.36%) were PWD which is slightly below the 12% goal. Therefore, a trigger exists for applicants in the Internship programs. However, we cannot determine whether triggers exist for selections since data is not available on the entire applicant population. Mentoring Programs: There were 1087 participants in the various IRS Mentoring programs that served as mentors or mentees; 130 (11.96%) were PWD, slightly below the 12% goal. However, we cannot determine whether triggers exist for selections since data is not available on the entire applicant population. Coaching Program: There were 153 participants in the IRS Coaching program that served as coaches or were coached. Only 10 (6.54%) were PWD which is below the 12% goal. Therefore, a trigger exists for applicants in the Coaching program. However, we cannot determine whether triggers exist for selections since data is not available on the entire applicant population. Relevant Pool: Total Permanent Workforce – PWD: 13.65% Detail Opportunities Program: The Detail Opportunities Program (GS-11 and above) had a Relevant Pool of 13.16%. There was a total of 9045 applicants; 1270 (14.04%) were PWD. A total of 57 (10.86%) of the 525 selectees were PWD. IRS has a trigger in the Detail Opportunities selections since the percentage was lower than the percentage of applicants. Relevant Pool: Grade equivalent 11-15s – PWD: 13.16% Leadership Development Programs: The Relevant Pool of grade equivalent 14 through 15 is 13.67%. The Executive Readiness (XR) Program had a total of 194 applicants; 31 (15.98%) applicants were PWD. A total of seven (12.28%) of the 57 selectees were PWD. IRS has a trigger in the XR selections since the percentage was lower than the percentage of applicants. Relevant Pool: Grade equivalent 14-15s – PWD: 13.67% XR Program - Applicants = 15.98% and Selections 12.28% *There was no announcement for the Candidate Development Program (CDP) in FY 2022.

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   Yes

     b.   Selections (PWTD)   Answer   Yes

Internship Programs: There were 352 participants in the IRS Internship program; 10 (2.84%) were PWTD compared to the 2% PWTD goal. Therefore, no triggers exist for applicants. However, we cannot determine whether triggers exist for selections since data is not available on the entire applicant population. Mentoring Programs: There were 1087 participants in the various IRS Mentoring programs serving as mentors or mentees; 49 (4.51%) were PWTD which is above the 2% goal. However, we cannot determine whether triggers exist for selections since data is not available on the entire applicant population. Coaching Program: There were 153 participants in the IRS Coaching program serving as coaches or coachees. Five (3.27%) were PWTD which is above the 2% goal. However, we cannot determine whether triggers exist for selections since data is not available on the entire applicant population. Relevant Pool: Total Permanent Workforce – PWTD: 3.40% Detail Opportunities Program: A review of the Detail Opportunities Program revealed that of

the 9045 applicants for details at the GS-11 and above level, 136 (1.50%) were PWTD. Only five (0.95%) of the 525 selectees were PWTD. A trigger exists for PWTD for applicants because the percentage is lower than the percentage in the relevant pool (2.85%). In addition, there is a trigger for selections since the percentage selected was lower than the percentage of applicants. Relevant Pool: Grade equivalent 11-15s – PWTD: 2.85% Applicants 1.50% Selections 0.95% Leadership Development Programs: The Executive Readiness (XR) Program had a total of 194 applicants. Five (5) applicants were PWTD (2.58%). This is slightly below the Relevant Pool of grade equivalent 14 through 15 of 2.72%. There were no PWTD selectees. IRS has a trigger in the XR selections since the percentage was lower than the percentage of applicants. Relevant Pool: Grade equivalent 14-15s – PWTD: 2.72% XR Program - Applicants = 2.58% and Selections = 0.00%

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

Source: (new B9-2) Total Time-Off Awards 1-10 Hours: ¨ The inclusion rate for PWD (10.76%) was less than the no disability inclusion rate (12.93%) so there is a trigger. ¨ The inclusion rate for PWTD (11.71%) was less than the no disability inclusion rate (12.93%) so there is a trigger. Total Time-Off Awards 11-20 Hours: ¨ The inclusion rate for PWD (8.94%) was less than the no disability inclusion rate (11.28%) so there is a trigger. ¨ The inclusion rate for PWTD (9.75%) was less than the no disability inclusion rate (11.28%) so there is a trigger. Total Time-Off Awards 21-30 Hours: ¨ The inclusion rate for PWD (4.74%) was less than the no disability inclusion rate (4.95%) so there is a trigger. ¨ The inclusion rate for PWTD (5.20%) was greater than the no disability inclusion rate (4.95%) so there is not a trigger. Total Time-Off Awards 31-40 Hours: ¨ The inclusion rate for PWD (16.78%) was less than the no disability inclusion rate (17.22%) so there is a trigger. ¨ The inclusion rate for PWTD (19.53%) was greater than the no disability inclusion rate (17.22%) so there is not a trigger. Total Cash Awards $500 Under: ¨ The inclusion rate for PWD (15.50%) was less than the no disability inclusion rate (18.75%) so there is a trigger. ¨ The inclusion rate for PWTD (17.72%) was less than the no disability inclusion rate (18.75%) so there is a trigger. Total Cash Awards between $501 and $999: ¨ The inclusion rate for PWD (11.74%) was less than the no disability inclusion rate (12.85%) so there is a trigger. ¨ The inclusion rate for PWTD (15.21%) was greater than the no disability inclusion rate (12.85%) so there is a not trigger. Total Cash Awards between $1000 and $1999: ¨ The inclusion rate for PWD (39.73%) was less than the no disability inclusion rate (44.06%) so there is a trigger. ¨ The inclusion rate for PWTD (44.63%) was greater than the no disability inclusion rate (44.06%) so there is not a trigger. Total Cash Awards between $2000 and $2999: ¨ The inclusion rate for PWD (9.80%) was less than the no disability inclusion rate (12.12%) so there is a trigger. ¨ The inclusion rate for PWTD (11.64%) was less than the no disability inclusion rate (12.12%) so there is a trigger. Total Cash Awards between $3000 and $3999: ¨ The inclusion rate for PWD (8.71%) was less than the no disability inclusion rate (13.13%) so there is a trigger. ¨ The inclusion rate for PWTD (8.66%) was less than the no disability inclusion rate (13.13%) so there is a trigger. Total Cash Awards between $4000 and $4999: ¨ The inclusion rate for PWD (1.08%) was less than the no disability inclusion rate (1.54%) so there is a trigger. ¨ The inclusion rate for PWTD (1.05%) was less than the no disability inclusion rate (1.54%) so there is a trigger. Total Cash Awards greater than $5000: ¨ The inclusion rate for PWD (0.69%) was less than the no disability inclusion rate (1.41%) so there is a trigger. ¨ The inclusion rate for PWTD (0.55%) was less than the no disability inclusion rate (1.41%) 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	0	0.00	0.00	0.00	0.00
Time-Off Awards 1 - 10 Hours: Total Hours	0	0.00	0.00	0.00	0.00
Time-Off Awards 1 - 10 Hours: Average Hours	0	0.00	0.00	0.00	0.00
Time-Off Awards 11 - 20 hours: Awards Given	0	0.00	0.00	0.00	0.00
Time-Off Awards 11 - 20 Hours: Total Hours	0	0.00	0.00	0.00	0.00
Time-Off Awards 11 - 20 Hours: Average Hours	0	0.00	0.00	0.00	0.00
Time-Off Awards 21 - 30 hours: Awards Given	0	0.00	0.00	0.00	0.00
Time-Off Awards 21 - 30 Hours: Total Hours	0	0.00	0.00	0.00	0.00
Time-Off Awards 21 - 30 Hours: Average Hours	0	0.00	0.00	0.00	0.00
Time-Off Awards 31 - 40 hours: Awards Given	0	0.00	0.00	0.00	0.00
Time-Off Awards 31 - 40 Hours: Total Hours	0	0.00	0.00	0.00	0.00
Time-Off Awards 31 - 40 Hours: Average Hours	0	0.00	0.00	0.00	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	0	0.00	0.00	0.00	0.00
Cash Awards: $501 - $999: Total Amount	0	0.00	0.00	0.00	0.00
Cash Awards: $501 - $999: Average Amount	0	0.00	0.00	0.00	0.00
Cash Awards: $1000 - $1999: Awards Given	0	0.00	0.00	0.00	0.00
Cash Awards: $1000 - $1999: Total Amount	0	0.00	0.00	0.00	0.00
Cash Awards: $1000 - $1999: Average Amount	0	0.00	0.00	0.00	0.00
Cash Awards: $2000 - $2999: Awards Given	0	0.00	0.00	0.00	0.00
Cash Awards: $2000 - $2999: Total Amount	0	0.00	0.00	0.00	0.00
Cash Awards: $2000 - $2999: Average Amount	0	0.00	0.00	0.00	0.00
Cash Awards: $3000 - $3999: Awards Given	0	0.00	0.00	0.00	0.00
Cash Awards: $3000 - $3999: Total Amount	0	0.00	0.00	0.00	0.00
Cash Awards: $3000 - $3999: Average Amount	0	0.00	0.00	0.00	0.00
Cash Awards: $4000 - $4999: Awards Given	0	0.00	0.00	0.00	0.00
Cash Awards: $4000 - $4999: Total Amount	0	0.00	0.00	0.00	0.00
Cash Awards: $4000 - $4999: Average Amount	0	0.00	0.00	0.00	0.00
Cash Awards: $5000 or more: Awards Given	0	0.00	0.00	0.00	0.00
Cash Awards: $5000 or more: Total Amount	0	0.00	0.00	0.00	0.00
Cash Awards: $5000 or more: Average Amount	0	0.00	0.00	0.00	0.00

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

Source: (new B9-2) ¨ The inclusion rate for PWD (2.86%) was less than the no disability inclusion rate (3.73%) so there is a trigger. ¨ The inclusion rate for PWTD (3.24%) was less the no disability inclusion rate (3.73%) 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 2022 submission. OCRE is hopeful that efforts made in FY 2023 will provide Treasury the opportunity to submit accurate Applicant Flow data and Part J responses for the FY 2023 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. 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 2022 submission. OCRE is hopeful that efforts made in FY 2023 will provide Treasury the opportunity to submit accurate Applicant Flow data and Part J responses for the FY 2023 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 2022 submission. OCRE is hopeful that efforts made in FY 2023 will provide Treasury the opportunity to submit accurate Applicant Flow data and Part J responses for the FY 2023 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 2022 submission. OCRE is hopeful that efforts made in FY 2023 will provide Treasury the opportunity to submit accurate Applicant Flow data and Part J responses for the FY 2023 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 2022 submission. OCRE is hopeful that efforts made in FY 2023 will provide Treasury the opportunity to submit accurate Applicant Flow data and Part J responses for the FY 2023 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

       i.   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 2022 submission. OCRE is hopeful that efforts made in FY 2023 will provide Treasury the opportunity to submit accurate Applicant Flow data and Part J responses for the FY 2023 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 2022 submission. OCRE is hopeful that efforts made in FY 2023 will provide Treasury the opportunity to submit accurate Applicant Flow data and Part J responses for the FY 2023 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 2022 submission. OCRE is hopeful that efforts made in FY 2023 will provide Treasury the opportunity to submit accurate Applicant Flow data and Part J responses for the FY 2023 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   No

Of the 36 Schedule A employees with a disability eligible for conversion in FY 22, 14 employees were converted untimely due to the conversion PARs being submitted late; however, as of the 4th quarter, all 36 conversions had been processed. IRS Human Capital Office (HCO) is collaborating with the Business Based Divisions (BBDs) to ensure all future PARs are submitted timely for conversion. All FY23 Q1 PARs are on schedule for timely processing.

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

Source: (B14) ¨ The inclusion rate for PWD (13.36%) exceeded the inclusion rate for persons with no disability (12.43%) for voluntary separations so there is a trigger. ¨ The inclusion rate for PWD (0.93%) exceeded the inclusion rate of persons with no disability (0.88%) 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	720	0.92	0.86
Permanent Workforce: Resignation	6212	6.92	7.58
Permanent Workforce: Retirement	3607	4.52	4.32
Permanent Workforce: Other Separations	775	1.80	0.80
Permanent Workforce: Total Separations	11314	10.83	13.56

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

Source: (B14) ¨ The inclusion rate for PWTD (12.73%) exceeded the inclusion rate for persons with no disability (12.43%) for voluntary separations so there is a trigger. ¨ The inclusion rate for PWTD (0.95%) exceeded the inclusion rate of persons with no disability (0.88%) 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	720	0.94	0.87
Permanent Workforce: Resignation	6212	6.05	7.54
Permanent Workforce: Retirement	3607	5.22	4.32
Permanent Workforce: Other Separations	775	1.41	0.92
Permanent Workforce: Total Separations	11314	13.63	13.65

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.

In FY22, of the PWD that separated from the agency, 31.4% retired and 49.7% resigned. The Exit Survey results (as of Q3) showed that PWD resigned due to personal circumstances (10.0%) or transferred to another agency (6.7%). Job related stress had the highest impact on this group (49.2%). Nearly two-thirds (65.2%) of PWD respondents indicated they would return to work after separating due to Job-Related Stress, and the same percentage (65.2%) 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.

In response to the pandemic, the Service first moved to have most employees work from home but subsequently called certain mission-critical employees back to the office. A phased approach to bringing the entire workforce back to work in the office was later initiated with varying frequency depending on the nature of the jobs performed and other circumstances. This large movement concerning where work is performed highlighted various issues concerning accommodation. The Service is exploring how to best balance the obligation to accommodate employees with disabilities while either working in the office or at home while avoiding the spending of appropriated funds for personal use items in an effort to be a good steward of taxpayer dollars. The IRS successfully transitioned from General Services Administration (GSA) Federal Relay Services (FRS) to Federal Communications Commission (FCC) Telecommunications Relay Services (TRS) and contractual services. FRS provides telecommunications services for federal employees who are Deaf or Hard of Hearing or have speech disabilities. To ensure employees experienced improved access, enhanced service and no loss of coverage, the IRS worked closely with GSA to transition 6 of the 8 telecommunication services from FRS to TRS which comes at no cost to government agencies. In addition, for the two remaining services not covered by TRS, IRS used GSA's Multiple Award Schedule (MAS) and awarded contracts for Video Remote Interpreting (VRI) and Relay Conference Captioning (RCC). GSA decommissioned FRS on February 13, 2022 and the IRS successfully transitioned timely. The Internal Revenue Service is committed to ensuring accessibility of agency facilities and technology for employees, the taxpaying communities they

serve and the partner organizations that are provided federal financial assistance. Highlights of improvement actions the agency has undertaken in FY22 are as follows: Due to the pandemic, the Service conducted annual compliance visits with recipients of federal financial assistance "virtually" in FY21; however, with staff vacancies and the recognized advantage of "onsite" compliance reviews to better assess and improve accessibility of facilities and programs, a decision was made to halt compliance reviews until FY23. The Service still continues to conduct training with IRS employees through events such as SABA open enrollment sessions, participation in the Fundamental Management Skills course for new IRS managers, and direct requests from business unit managers to speak directly to their employees about the topic of taxpayer civil rights, including the importance of reasonable accommodations for taxpayers with disabilities. The IRS is partnering with Microsoft (MS) representatives to have IRS employees with disabilities provide MS with feedback concerning accessibility of MS Teams from the perspectives of Deaf/ Hard of Hearing, blind/low vision and other users with disabilities. The effort will involve focus groups conducted beginning in May 2022. Expected outcomes include identifying settings options that best meet the needs of the diverse user groups and possible adjustments to IT security controls and perhaps enhancements to future iterations of MS Teams. The IRS has published numerous articles in support of accessibility. Some of the articles published include, but are not limited to the following: "NDEAM: America's Recovery: Powered by Inclusion"; "Where to go for Equity Diversity and Inclusion (EDI) Questions? (EDI Mailbox)"; "National Braille Literacy Month"; "What does Diversity, Equity, Inclusion and Access (DEIA) mean?"; "Where to go for EDI Services"; and "American Heart Month" and "IRS Employee Organizations/ Employee Resource Groups."

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.)

The reasonable accommodation process is neither a static nor closed system. Previously the Service could be expected to address less than 1,000 requests for accommodations annually; however, following the issuance of Executive Order 14043 (in the fall of 2021), which required employees be vaccinated against Covid-19, the IRS received more than 6,700 requests for accommodation based on medical needs or religious beliefs and more than 3600 requests for accommodation not related to the vaccine mandate. The IRS also made a variety of policy and program changes in light of the evolving nature of the pandemic environment including a phased return to office for all employees which also prompted substantial numbers of accommodation requests. The unprecedented RA inventory levels coupled with addressing novel issues such as balancing individual medical concerns with the risk of the spread of disease or balancing respect for religious beliefs with the need to carry out the Service's mission have strained resources. As a result, cycle times increased from 70 days in Sept 2021 to 83 days in Sept. 2022. The Service remains committed to further exploring opportunities to expedite RA request processing such as adding staffing or contract support personnel to facilitate the interactive dialogue between employees/applicants with disabilities and IRS management as well as navigating the various support functions involved with assessing and fulfilling varying accommodation needs.

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.

Implementation of Treasury's Reasonable Accommodations Tracker (RA Tracker), an application information system that is used to report department wide reasonable accommodations requests and provide aggregate data through generated reports annually to the Office of Personal Management (OPM) and EEOC, has been delayed. The original plan was to finalize all enhancements by April 2022 and implement in May; however, due to the unprecedented RA inventory of over 3600 cases, three times the usual annual inventory, implementation is now delayed to Q2 of FY23 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. The IRS continues to effectively provide training service-wide. For example, the Disability Services Section (DSS) conducted two training sessions for 150 Front Line Managers on Sign Language Interpreting (SLI) and Communication Access Realtime Translation (CART) Services in June and July of 2022. These sessions were intended for both new managers and as a refresher for managers that supervise employees who are Deaf and Hard of Hearing. Discussions included the SLI virtual, face-to-face, remote and onsite CART services. It also showcased the Telecommunication Relay Services (TRS) which included Video Relay Services (VRS) and Conference Captioning (CC). Additionally, the IRS' Equity, Diversity and Inclusion (EDI) and General Legal Services (GLS) offices partnered to develop and deliver Reasonable Accommodation (RA) training for managers, including information on proper management responses to commonly encountered challenges highlighted in decisions where the Service failed to accommodate individual employees. The training was rolled out to over 500 managers in the Wage & Investment organization during three sessions in August 2022. The IRS Reasonable Accommodation Training Cadre also presented approximately 46 training sessions (totaling over 61 hours) on varying topics, to a total of 3,221 participants of which at least 2,338 were managers. Particularly noteworthy highlights of these trainings being: • RA Open Enrollment Sessions in SABA, July -September •EDI, Reasonable Accommodations Return to Office training for managers, May -July • The first Face to Face training presentation requested since returning to office from pandemic closures (Austin, TX) was held on July 26, 2022 in Austin, TX. • Reasonable Accommodations training session for newly hired EEO Counselors Training was also provided via Lunch and Learn sessions, including topics such as "Inclusion in Action – An Overview of Executive Order 14035: Diversity, Equity, Inclusion, and Accessibility (DEIA) in the Federal Workforce," and "Reasonable Accommodation (RA) Services, RA Requests and Return to Office (RTO), and the HCO Hardship Program." The IRS's Reasonable Accommodation (RA) program focused its efforts on addressing large numbers of pandemic-related RA requests including medical and religious based requests for exemption from the vaccination requirements, requests for exemption from testing and mask wearing requirements and requests for telework etc. Notable impacts include the total number of sign language and CART services requested increasing from 1,095 requests received (Q1) to 1,355 requests (Q3) – resulting in an increase of services filled by the contract vendor (from 397 requests to 1005 requests respectively). Despite the increase in the number of requests for face-to-face services with the return to office, the program fill rate increased to 99% in the 3rd quarter. Lastly, in response to an expected hiring surge in FY 2022, which would likely include a number of new employees with disabilities, the IRS purchased an inventory of the most commonly needed hardware components of adaptive technology accommodation solutions so the accommodations could be quickly furnished without the need to procure the necessary items.

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 is converting the previously published Interim Guidance for Personal Assistance Services (PAS) into a section of the Internal Revenue Manual (IRM) on June 10, 2022, to enable managers and employees to readily locate the policy and procedures. Information on PAS is available on the IRS's internal and external websites. Training on PAS was incorporated into a broader Reasonable Accommodation training session presented to managers in the Wage & Investment Division of the IRS. To date, the IRS has not received a request for PAS but is poised to respond if/when a request is made.

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   No

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   No

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.

> Not Applicable

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   No

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-21-0023-F (R/A) ORDER The IRS shall take the following actions within 120 calendar days of this decision becoming final: 1. Evaluate Complainant's current situation and ensure her accommodation issues have been completely resolved. 2. Provide in-depth training for S1 and S2 specific to managerial responsibilities as they relate to the reasonable accommodation process. 3. Pay proven compensatory damages (if any) with respect to the Complainant within sixty (60) days of receipt of the order establishing the amount of damages to which the Complainant is entitled; guidance regarding compensatory damages is attached. 4. In the absence of any evidence that the Complainant was represented by an attorney, Complainant is not entitled to petition for attorney's fees. 5. Post a notice on all bulletin boards (electronic or physical) at the facility where the discrimination occurred for a period no less than 60 days. In addition, the Agency shall provide a report with appropriate documentation showing implementation of these remedies, with the first report due within sixty (60) days of receipt of this decision and with reports issued monthly until a final implementation report is issued. (2) IRS-21-0348-F (R/A) ORDER The IRS shall take the following actions within 120 calendar days of this decision becoming final: 1. Evaluate Complainant's current situation and determine an effective reasonable accommodation for Complainant, including the possibility of a temporary or permanent reassignment. 2. Restore any and all leave Complainant took related to the denial of reasonable accommodation, beginning on February 1, 2021. 3. Pay Complainant the applicable salary for the time she spent on Leave Without Pay (LWOP), beginning on April 14, 2021. 4. Provide two (6) hours of training on the Agency's obligations under the Rehabilitation Act to the managers identified as S2, S3, D1 and SRA. 5. In compliance with the Elijah Cummings Federal Employee Antidiscrimination Act of 2020, Public Law 116-283, within 60 days of receiving the FAD, notify OCRD: (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. 6. Post the attached Notice on all bulletin boards (electronic or physical) at the facility in Ogden, Utah where the discrimination occurred, for a period no less than 60 days. 7. Provide a report 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. 8. In the absence of any evidence that the Complainant was represented by an attorney, Complainant is not entitled to petition for attorney's fees. 9. Pay proven compensatory damages (if any) with respect to the Complainant within sixty (60) days of receipt of the order establishing the amount of damages to which the Complainant is entitled; guidance regarding compensatory damages is attached. In addition, the Agency shall provide a report with appropriate documentation showing implementation of these remedies, with the first report due within sixty (60) days of receipt of this decision and with reports issued monthly until a final implementation report is issued. (3) IRS-21-0644-F (R/A) ORDER The IRS shall take the following actions: 1. To the extent that a mask mandate is still in effect in the building where Complainant works, ensure that Complainant is offered an effective reasonable accommodation of full-time telework. In the alternative, the Agency must provide Complainant the option of being transferred or reassigned to a different location or vacant funded position, with no reduction in pay from her current position, where she will not be required to wear a mask, or where she will be granted full-time telework. If Complainant is going to be transferred to a different work location, Complainant should be consulted as to her location preferences and presented with several options, where possible, in her preferred areas. 2. Reinstate accrued sick and annual leave that Complainant used between April 2021 and the date of this decision, 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. 3. Pay compensatory damages (if any) with respect to Complainant within sixty (60) days of receipt of the order establishing the amount of damages to which Complainant is entitled; guidance regarding compensatory damages is attached. Per the below guidance, Complainant may submit evidence of compensatory damages within thirty (30) days of the date of receipt of this decision. 4. If Complainantuses the services of an attorney, she may petition for attorney's fees, in accordance with

29 CFR §1614.501(e). Any request for attorney's fees must be submitted to the Acting Director, Office of Civil Rights and Diversity, within thirty (30) days of the date of receipt of this decision. 5. Provide a minimum of six (6) hours of EEO training to S2 and S3, with an emphasis on disability discrimination and management's obligations to provide reasonable accommodation. 6. Consider taking appropriate disciplinary action against S2 and S3. Please note that training is not considered disciplinary action. 7. 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 OCRD: (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. 8. 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 2970 Philadelphia, PA facility, as well as on the SB/SE 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 the SB/SE unit of the facility. 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. 9. Provide a report to OCRD 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.

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

Source of the Trigger	Workforce Data (if so identify the table)
Specific Workforce Data Table	Workforce Data Table - B6
STATEMENT OF CONDITION THAT WAS A TRIGGER FOR A POTENTIAL BARRIER: 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. •GS-11/12/13/14 for Revenue Agent (GS-0512) •GS-12/13/14 for Revenue Officer (GS-1169)

STATEMENT OF BARRIER GROUPS:	Barrier Group
	People with Disabilities

Barrier Analysis Process Completed?:	N
Barrier(s) Identified?:	N

STATEMENT OF IDENTIFIED BARRIER: Provide a succinct statement of the agency policy, procedure or practice that has been determined to be the barrier of the undesired condition.	**Barrier Name**	**Description of Policy, Procedure, or Practice**
	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.

Objective(s) and Dates for EEO Plan

Date Initiated	Target Date	Sufficient Funding / Staffing?	Date Modified	Date Completed	Objective Description
10/01/2018	09/30/2019	Yes			To increase access to advancement opportunities for the Revenue Agent position for PWDs at the GS-11/12/13/14 grade levels in the IRS.

Responsible Official(s)

Title	Name	Standards Address The Plan?
Chief Diversity Officer - Equity, Diversity & Inclusion	Valerie Gunter	No
IRS Human Capital Officer	Kevin McIver	No

Planned Activities Toward Completion of Objective

Target Date	Planned Activities	Sufficient Staffing & Funding?	Modified Date	Completion Date
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
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 Denise Brown, 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
03/30/2020	Review for FY 19 & FY20 data for PWD/PWTD to determine if trends have changed in the various areas initially reviewed (FY16-18)	Yes		011/03/2021
12/30/2019	For FY20 EDI will continue to identify the root cause for the barrier for this group and will establish action items to assist with removing the barrier.	Yes	09/30/2020	01/15/2020
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	
Planned Activities Toward Completion of Objective				
Target Date	**Planned Activities**	**Sufficient Staffing & Funding?**	**Modified Date**	**Completion Date**
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
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		
03/31/2023	Collaborate with appropriate personnel to provide education on targeted disabilities.	Yes		

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		
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, a articles, emails, etc.	Yes		
10/31/2023	Plan NDEAM event	Yes		
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		

Report of Accomplishments	
Fiscal Year	**Accomplishments**
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.
2019	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. 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
2020	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. Training was developed by the BA team to provide interviewing techniques for PWD/T.
2021	The Barrier Analysis (BA) team conducted an analysis of Persons with Disabilities (PWD) and Persons with Targeted Disabilities (PWTD) in Revenue Agent (RA) and Revenue Officer (RO) positions within the IRS. The analysis compared the existing participation rates to the goals of 12% for PWD and 2% for PWTD within the GS-11 to GS-15 grade cluster. Listed below are the specific areas where the goals were not met. Participation rate for RAs (Job Series 0512): GS-12 – PWD 11.17% GS-13 – PWD 8.14% and PWTD 1.84% GS-14 – PWD 6.50% and PWTD 1.42% GS-15 – PWD 7.35% Participation rate for ROs (Job Series 1169): GS-12 – PWD 8.97% and PWTD 1.82% GS-13 – PWD 7.77% and PWTD 1.27% GS-14 – PWD 6.31% GS-15 – *GS 15 positions were not considered because the total positions are less than 2. This analysis was shared with the Business Based Directors (BBDs) for each division and BBDs were reminded to consider PWD/PWTD when filling RA & RO positions. The Service also delivered "Unconscious Bias" and "Interviewing Techniques" training to IRS employees.

2022	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. As of August 18, 2022, the mock interview cadre conducted 85 mock interviews. Facilitated an agency-wide event on October 21, 2022, 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 July 2022. 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. 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. Additionally, we've had the following participation in the programs below: • Mentoring program: 11.96% PWDs & 4.51% PWTDs • Coaching program: 5.88% PWDs & 3.36% PWTDs • Detail program: 10.86% PWDs & 0.95 PWTDs • Leadership development program: 8.39% PWDs & 2.10% PWTDs

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).

•Exceeded the 12% for RA: GS-11, 12 •Increased the participation rate of: RA GS-12, 14 and RO GS-12, 14 •Increased RA PWD New Hires •Eliminated complaints filed based on allegations of disability discrimination related to non-selection for the position of RAs and/or ROs

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.

Please refer to planned activities listed above on how the agency will focus efforts on to increase (1) Participation rate of PWDs in RA GS 13, 14 (2) RO 12, 13, 14