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# IRS Future State: Overview

2016



# Background

- Over a decade of progress improving processing, increasing filing and payment options, and expanding online services
- Efforts known collectively as IRS “future state”
- Gathering input and incorporating stakeholder perspectives is a necessary and ongoing effort

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# The Case for Change



**Evolving Taxpayer Expectations**



**Increasing Complexity**



**Combatting Noncompliance, Identity Theft & Refund Fraud**



**Coping with Limited Budgets**



**Incorporating Stakeholders Perspectives**

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# Timeline of Future State Evolution

Moving Ahead

Recently

1 Year Ago

2 Years Ago

Plan Integration  
Prioritization

Goals

Initiatives

Roadmap

Themes

Taxpayer  
Experiences

Idea Generation

Visioning



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# Future State Themes

1

Facilitate voluntary compliance by empowering taxpayers with secure innovative services, tools, and support

2

Understand non-compliant taxpayer behavior, and develop approaches to deter and change it

3

Leverage and collaborate with external stakeholders

4

Cultivate a well-equipped, diverse, skilled, and flexible workforce

5

Select highest value work using data analytics and a robust feedback loop

6

Drive more agility, efficiency, and effectiveness in IRS operations

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# Future State Concept Diagram

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## Improved Taxpayer Experience



### PRE-FILING



#### Connected Taxpayers

Seamless integration across digital chat, phone, or in-person contacts with some channels providing 24/7 access and personalized information



#### Proactive Outreach to Taxpayers

Increased educational outreach to taxpayers to deter non-compliant behavior, and customized online notifications based on taxpayer history

### AT FILING



#### Independent & Empowered Taxpayers

Online accounts provide secure channel for adjustments and corrections along with clear explanations of issues and required adjustments

### POST-FILING



#### Timely Resolution of Issues

Errors are detected at time of filing, and taxpayers are given early notification to correct issues

## More Efficient Operations



#### Equipped and Efficient Workforce

Enhanced analytics identifies highest priority activities, while knowledge management gives employees skills for future work



#### Flexible Work Environment

Taxpayer and internal files are digitized over secure channels, leading to higher efficiency and enabling work to be less geographically-based



#### Analytics-Driven Operations

Data analysis helps with issue identification, taxpayer outreach, treatment stream alignment, and work routing



#### Coordination Across Business Units and Partners

Systems and structures help workforce across business units leverage existing investments and collaborate with external partners



Last Updated 06/03/2016





# What This Means For the Taxpayer...

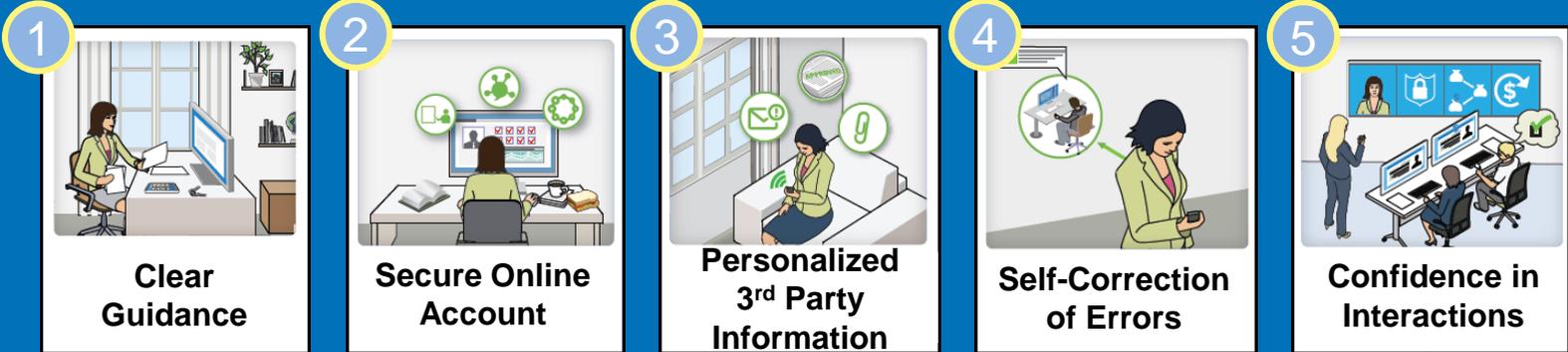
- ✓ Increased Online & Virtual Assistance Offerings
- ✓ More Robust Authentication to Guard Against Stolen Identity Refund Fraud
- ✓ Early Issue Identification for Timely Resolution
- ✓ End-to-End Experience to Reduce Unnecessary Interactions
- ✓ Expanded Data Analytics to Better Focus Service & Enforcement

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# Individual Example



**Taxpayer and Outreach Education**

**e-Authentication**

**Digital Taxpayer Account Management**

**Third Party Services**

**Taxpayer Self-Correction**

**Digital Content Management**

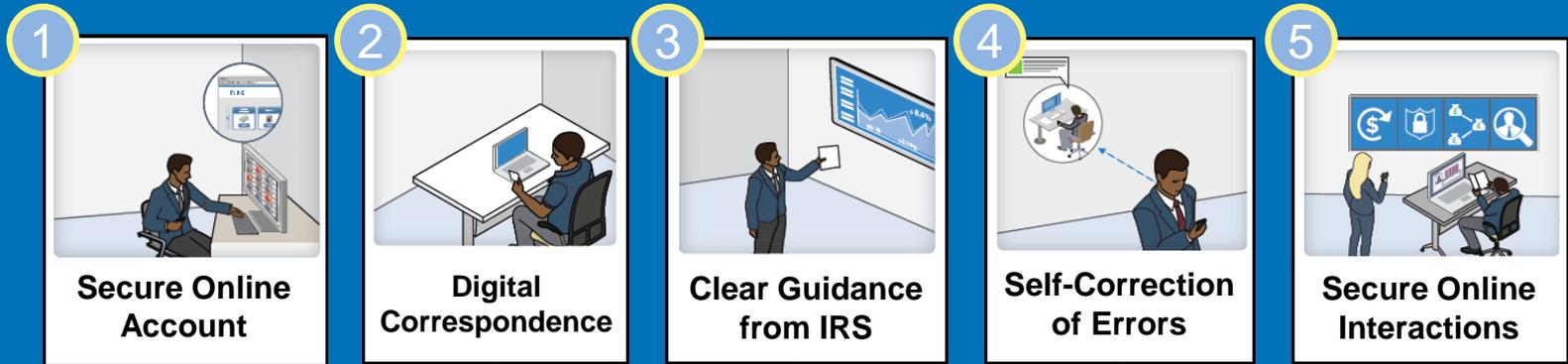
**Privacy and Security Management**

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# Small Business Example



**e-Authentication**

**Third Party Authorization**

**Digital Taxpayer Account Management**

**Digital Content Management**

**Stakeholder Outreach & Education**

**Taxpayer Self-Correction**

**Privacy and Security Management**

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# Large Business Example

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# Developing Future State Goals

- 1 Expedite Compliance Issue Resolution**
- 2 Improve Capabilities for Self-Correction and Self-Service**
- 3 Facilitate Resolution via Efficient, Effective Channels**
- 4 Decrease Recurring Compliance Issues**
- 5 Cultivate an Engaged and Flexible Workforce**
- 6 Increase Customer (Taxpayer) Satisfaction**
- 7 Enable More Agile and Efficient Business Operations**

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# Consolidating Planning Efforts



Aggregate, prioritize and re-sequence envisioned initiatives into a consolidated roadmap toward the future



Pursue priority initiative development, with a continual focus on engaging stakeholders



Update the IRS Strategic Plan (2018-2022)



Track performance toward future state goals, report results and gather input from stakeholders





# Closing Reminders

- ✓ Tell us what you think by taking the survey
- ✓ For more information, search using keywords “Future State” on IRS.gov

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