The high-level roadmap highlights milestones from the Strategic Operating Plan

X.X: Initiative number   CE: Climate and Energy   IA: Immediate Actions

Objectives	FY 2023 – FY 2024	FY 2025 – FY 2028
1 — **Dramatically improve services to taxpayers to help them meet their obligations and receive the tax incentives for which they are eligible**	1.1 - Expanded hours available at the TACs for appointments and on-demand service with staffing to meet expected demand 1.2 - Certain documents, paper correspondence and non-tax forms digitalized and enhanced scanning of key tax forms 1.4 – Enhancements to individual and online Tax Pro Accounts implemented and Business Online Accounts launched 1.6 – Business transcripts available online and in easy-to-read format through Business Online Account 1.6 - Current transcripts updated to be user-friendly and available in Spanish and other languages 1.11 - Improved taxpayer tracking tools in online accounts for filing season 2024 CE - Information page about clean vehicle credits launched and detailed FAQs for tax credits for residential clean energy and energy efficiency improvements made available CE - Tax credit transfer process to reduce price of clean vehicle at a dealership established CE - Digital intake processes to facilitate claiming tax credits by state and local governments, tribal governments and nonprofit organizations developed	1.2 – High-priority forms, returns and certifications available for electronic filing and digitalization 1.2 – High-priority end-to-end digital processes implemented 1.2 - Additional forms, returns and certifications available for electronic filing and digitalization based on prioritization plan 1.6 - Online accounts upgraded to incorporate user-friendly views of account and return information (e.g., notices, letters, account history, payment history, balances due, etc.) 1.9 - New contacts launched for lawful non-filers who may be eligible for a credit or deduction to ensure they are aware of their eligibility and have the tools and assistance necessary to claim appropriate credits or deductions 1.10 - Integrated payment capability by card and digital wallet available 1.11 - Real-time processing estimates launched with data analytics to provide more accurate status messaging 1.11 - Audit status and other process-tracking launched and enhanced based on prioritization plan
2 — **Quickly resolve taxpayer issues when they arise**	2.1 -Taxpayers and preparers notified for mismatches against simple types of income (W2s and 1099 NECs) and processing errors 2.4 - Outreach and campaigns expanded to increase awareness of tax certainty programs and their benefits to taxpayers with complex issues 2.6 - Pilot program for new non-filer interventions launched IA – 5,000 additional customer service representatives onboarded and callback options expanded	2.1 -Taxpayers and preparers notified of potential filing issues including incentives related to children and other dependents and other issues to be determined 2.3 - Capabilities launched for taxpayers and tax professionals to receive and respond to additional notices electronically 2.6 - Capability launched for taxpayer access to a broader range of self-service debt repayment tools through online accounts
3 — **Focus expanded enforcement on taxpayers with complex tax filings and high-dollar noncompliance to address the tax gap**	3.1 - Centralized compliance planning function established to identify potential high-risk compliance cases 3.1 - Data and research approach implemented to inform and continuously refine compliance coverage levels needed to promote voluntary compliance 3.2, 3.3, 3.4, 3,5 - First wave of specialists hired and onboarded to work toward increasing compliance coverage rates	3.1 - Taxpayer compliance cases selected by centralized compliance-planning function using new analytics systems and refined risk-based case selection and routing 3.2, 3.3, 3.4, 3.5, 3.6 - Workforce hired and onboarded to achieve compliance coverage rates
4 — **Deliver cutting-edge technology, data, and analytics to operate more effectively**	4.1 - Modernized Information Returns intake platform deployed to provide a free online portal for businesses to file Form 1099-series information returns 4.1 - IRS systems improved to streamline access to individual taxpayer data for service and compliance purposes via secure, standardized application programing interfaces (APIs) 4.2 -Integrated business and IT product-and-platform operating model implemented to accelerate technology delivery 4.7 - New methodologies formulated to enhance and expand the estimation of tax gaps	4.1 - Business master file retired with systems and data migrated to modern solution 4.1 - Individual master file retired with systems and data migrated to modern solution 4.5 - Near-real-time taxpayer service data made available to IRS data scientists and analysts via modern analytical tools 4.6 - Data delivered to support a "Taxpayer 360°" holistic view based on business need and the prioritization established during the development of taxpayer service tools
5 — **Attract, retain, and empower a highly-skilled, diverse workforce and develop a culture that is equipped to deliver results for taxpayers**	5.1 - Hiring processes redesigned to improve applicant experience and talent-matching implemented 5.2 - Unified, enterprise-wide recruiting strategy developed 5.2 - Revamped IRS career page goes live online 5.2 – Pilot of "Lifting Communities Up" talent hub successfully launched 5.4 - IRS University launched enterprise-wide 5.4 - IRS-wide leadership, mentorship and coaching programs established 5.8 - Customer service standards created, implemented and measured IRS-wide	5.1 – Hiring status tracker developed to increase transparency in recruiting 5.2 - "Lifting Communities Up" talent hubs established in additional disadvantaged communities 5.6 - Legacy systems for strategic workforce planning joined into one technology platform for streamlined management of employee data and use of advanced workforce analytics 5.7 – Priority redesigned organizational structures established

Note: High-level roadmap numbering refers to Initiatives in the Strategic Operating Plan Section 3