IRS

Internal Revenue Service
Washington, D.C.
www.irs.gov

Results
- Consolidated three distribution centers into one
- Accelerated publishing cycles from months to less than a week
- Enabled easy, online access to timely information
- Facilitated flexible work schedules and a diverse workforce
- Streamlined workflows in a secure environment

United States Internal Revenue Service

Real returns

IRS improves citizen services with seamless access to information using Adobe Acrobat, enabling a dispersed workforce to collaborate virtually—reducing costs and improving operational efficiencies

Tax season at the Internal Revenue Service is a year-round operation. It is an unending cycle involving billions of documents as IRS staff review tax returns, process payments, and deliver thousands of tax forms and publications to hundreds of millions of citizens. For decades, the IRS has been a leader in the implementation of technology to better manage information and best respond to taxpayer needs. Now, with all 100,000 employees standardized on Adobe Acrobat, the IRS is enabling electronic collaboration among staff at unprecedented levels—dramatically reducing the cost of operations, while improving delivery of citizen services.

Since 1996, taxpayers have had web access to PDF forms, a strategy that has yielded savings in the millions of dollars annually for the IRS by decreasing costs associated with printing, storing, and mailing tax materials. "The very first PDF file ever created was an IRS tax form," says Paul Showalter, technical adviser in the IRS publishing division, who was there when it happened. "John Warnock and Charles Geschke, the co-founders of Adobe Systems, figured that if they could successfully convert a tax form to PDF, they could do anything."

Today, Adobe Acrobat is a key component for the IRS in streamlining workflows to keep thousands of forms and publications up to date, review and process over 200 million tax returns annually, and electronically distribute and receive tax materials.

Adobe Acrobat has continuously bridged the paper-to-digital divide at the IRS across screens and in the cloud, delivering real returns to the agency and the people it serves. By standardizing on Adobe Acrobat and Adobe Reader®, migrating PDF form design to Adobe LiveCycle® Forms, using e-signature capabilities in Adobe Acrobat and adopting Adobe LiveCycle Rights Management for security enhancements, IRS operations are more streamlined than ever.

Collaborate, revise, and publish

Hundreds of IRS forms and publications are updated every year, as is nearly every internal document the IRS uses—from the ubiquitous 1040 form to departmental policy and procedure manuals. Previously, revising and publishing paper forms was an enormously time-consuming and expensive effort. Staffers all worked in the same building, made handwritten markups on paper copies, added post-it notes to pages, and then manually aggregated revisions and composed layouts.

Today, people working in offices across the country can easily collaborate on documents using Adobe Acrobat editing tools and electronic workflows, from start to finish, to publish documents. Teams make extensive use of review, markup, and commenting features to revise PDF files, which are automatically routed through multiple review cycles and then passed on to composition specialists for layout using Adobe LiveCycle Forms. Final content is output as fillable, savable PDF forms and documents, rights-enabled through Adobe Reader Extensions, locked down internally using security capabilities in Acrobat, and posted on internal or external sites for immediate access. Document and forms revision cycles that previously took months can now be completed in less than a week.

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> **Paul Showalter, technical adviser, IRS Publishing Division**

Challenge
- Delivering government services cost-effectively while serving the needs of a diverse customer base
- Providing immediate access to current information for staff, tax professionals, and the public
- Improving tax form creation process, streamlined cycles

Solution
- Implement Adobe Acrobat to electronically create, publish, and distribute tax forms and departmental publications to internal staff and taxpayers
- Integrate Adobe LiveCycle solutions with Adobe Acrobat to administer rights management and handle form design at the enterprise level

Systems at a glance
Adobe Acrobat Pro

Adobe Reader

Adobe LiveCycle Enterprise Suite. Components used include:
- LiveCycle Forms
- LiveCycle Rights Management
- LiveCycle Reader Extensions

Adobe Creative Suite. Components used include:
- Adobe Photoshop®
- Adobe Illustrator®
- Adobe InDesign®
- Adobe Premiere® Pro

Adobe Captivate®

"The ability to push data out of PDF files into spreadsheets has always been useful to the IRS, but to actually collect data inside a PDF form helps to streamline the tax audit process and eliminate risk of errors," says Showalter. Auditors no longer have to manually accumulate data into spreadsheets and checklists for analysis. Showalter's team redesigned audit worksheets as fillable PDF forms used for data collection, resulting in faster, consistent, and more reliable tax examinations.

Integration with Microsoft
The IRS has benefitted from tighter integration between Adobe Acrobat and Microsoft Office applications. Accessing existing documents that are stored as PDF files improves user efficiencies when the files can be exported to Microsoft Word, Excel, or PowerPoint files enabling users to repurpose content without retyping anything.

Access to forms and publications through a Microsoft SharePoint site makes information available to staff anywhere, helping ensure everyone is working with current materials, and eliminates delays in shipping paper copies to remote staff—which previously could take up to two weeks. Correspondence that used to take hours now takes minutes.

"With a younger workforce coming in to the agency, there is an increased expectation of immediacy in accessing information," says Showalter. "Staff today expects to work at the speed of the Internet. That's how they were raised and that's what Adobe Acrobat provides."

For example, tax examiners have immediate access to thousands of PDF tax documents ranging from one page audit notification letters to 100-page tax guides, all tagged with metadata. They can search online document repositories to locate specific regulations in long documents by keyword, date, and other tags. As fields in PDF audit letters are linked to taxpayer records, examiners can automatically populate correspondence with accurate tax return information, as well as pull information from databases into fields in letters to provide taxpayers with relevant regulatory references.

Adobe Acrobat enables IRS employees to spend less time on administrative tasks and more time on taxpayer matters, improving timely, accurate service to citizens. Delivering materials as PDF documents also enables the IRS to adhere to agency-wide standards and a consistent look and feel.

"People can securely edit source files from anywhere, while supervisors can track where every job is at any point in a work cycle. The result is a dramatic increase in productivity," says Showalter. "We have complete visibility into the length of a job cycle, what staff members interacted with a project, and when."

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Streamline electronic returns

With an 80% increase in e-filed tax returns in recent years, new requirements for certain business and tax practitioners to submit returns electronically, and trends indicating that more individuals are opting to interact electronically with government agencies, the IRS serves the needs of a diverse community. Many people still like to get paper documents in the mail, and the IRS does mail out paper forms, booklets, and tax guides.

But as a matter of procedure, when citizens request tax materials, they are given a link to the appropriate place on irs.gov where they can immediately download PDF documents and be assured they are using the most current version. This shift from paper to digital delivery has resulted in the consolidation of three IRS fulfillment centers into one facility, an enormous cost and energy saving measure.

In addition to Adobe Acrobat and Adobe LiveCycle solutions, the IRS makes extensive use of the full complement of Adobe Creative Suite products, including Adobe Photoshop, Illustrator, InDesign, and Adobe Premiere Pro software to create and edit administrative, operational, and marketing materials. The agency also uses Adobe Captivate to create internal video presentations and training content.

Moving forward, the IRS is planning to provide mobile capabilities by enabling iPad users to interact with tax forms—as advanced functionality in Acrobat allows users to read, fill out, and save PDF forms on iPad, as well as participate in review and approval cycles. Other potential enhancements to IRS services using Acrobat are in planning stages, including notifying a user at download request if a more recent form is available since their last download, and integrating XML schema into the forms design process.

"Acrobat pays for itself in terms of user satisfaction. Not only staff—but every taxpayer who expects and gets immediate access to information," says Showalter. Add to that the benefits of easier document administration, streamlined publishing cycles, and reduced reliance on paper, to tally up the real returns Acrobat delivers to IRS and the people it serves.

For more information
www.adobe.com/products/ acrobatpro

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