



## U.S. Department of the Treasury

Public Law 115-336, "21st Century Integrated Digital Experience Act"

December 2023 Report

Prepared for the Office of Management and Budget and the public per the requirements of section 3(d) of Public Law 115-336.

# Progress to Implement the 21st Century Integrated Digital Experience Act 2023 Annual Report

## Background

Section 3(d) of the [21st Century Integrated Digital Experience Act \(21st Century IDEA\)](#) requires the head of each federal executive branch agency to report annually (through 2023) to the Director of the Office of Management and Budget (OMB) and the public on the agency's progress to implement the requirements of the Act, and modernize their websites and digital services. The information below details our efforts to modernize our websites and digital services in 2023.

## Efforts to Date

Building on the [work Treasury began in 2019 and accomplished through 2022](#), 2023's focus has been to continue with modernizing and improving our websites using Department-wide shared services; delivering a digital-first public experience with Treasury services and forms automation; and improving the customer experience through engagement and service delivery. Treasury continues to leverage 21st Century IDEA initiatives to streamline our digital footprint to better serve the American public.

Major accomplishments for 2023 include ongoing expansion of portfolio of hosted websites as a shared service provider, improving employee experience by upgrading internal and legacy websites, leveraging analytics through customer outreach to measure engagement, and collaborating across Treasury bureaus, communities of practice, and the Whitehouse to improve customer experience.

### Accomplishment #1: Delivering a Digital-First Public Experience

In 2023, Treasury prioritized expansion of online services and took measures to enhance these solutions to better serve the American public. From expanding the enterprise content management system (CMS) shared service to improving accessibility and adding chatbot functionality, Treasury is committed to delivering a digital-first public experience.

- Treasury Departmental (Headquarters) Offices (DO), offers the Acquia/Drupal CMS, combined with Akamai Content Delivery Network (CDN) as a shared service to host, publish and protect Treasury public-facing federal websites. The enterprise CMS offering provides reusable design themes and feature modules, applying U.S. Web Design System (USWDS) compliance standards and industry best practices for content management and security to help Treasury provide mission-critical information and services on their public-facing websites. To date, Treasury hosts a total of 14 public facing websites across four bureaus including five special offices (e.g., <https://www.cdfifund.gov>). In FY2024, Treasury will continue to expand the enterprise CMS to host three additional websites.
- The Internal Revenue Service (IRS) is committed to delivering a digital-first public experience via its [IRS.gov](https://www.irs.gov) website. [IRS.gov](https://www.irs.gov) is constantly updated with the most current tax information,

guidance, instructions, forms, and documents. The IRS maintains translations for thousands of its most heavily used pages, in seven different non-English languages. In addition, the IRS continues to focus on making additional digital tools and services available to taxpayers as defined by the [Internal Revenue Service Inflation Reduction Act Strategic Operating Plan](#) Objective 1. The IRS offers several online account options for individuals, business, and tax professionals, and is regularly adding features and functionality. Over the past year, IRS released features include expansion of payment plans, enhanced notifications, Income Verification Express Service (IVES) authorization approvals, and integration of secure two-way messaging. IRS added chatbot functionality and introduced several new notices to online availability. The IRS expanded secure messaging opportunities for several taxpayer segments including Appeals, Large Business and International, Small Business/Self-Employed, and Tax Exempt & Government Entities. Continued expansion for secure messaging installations is planned through FY25.

- The Alcohol and Tobacco Tax and Trade Bureau (TTB) launched the myTTB authorization service in March 2023 and the Craft Beverage Modernization Act (CBMA) Import Claims service in April 2023. The authorization service is a foundational element that is used across myTTB services and allows customers to directly manage permissions for their other users. The new services reside on the myTTB platform, which utilizes the TTB Design System (based on the U.S. Web Design System) to ensure it is responsive to mobile devices, Section 508 compliant, and provides a consistent look and feel across new TTB websites and services.

## **Accomplishment #2: Improving Internal-Facing Digital Services**

Treasury is focused on improvements to internal-facing websites and digital services that can increase efficiency of government operations. Such gains in efficiencies will enable employees to better deliver information and services to the public. Treasury updated and improved internal services throughout FY23 enabling Treasury employees to better serve their customers.

- DO continues to enhance their intranet, ensuring it is reliable and user-centered to integrate with day-to-day business applications. The intranet was successfully migrated to the Treasury Enterprise Azure Platform Services in the Microsoft Government Cloud. This migration improved the intranet response time and now has uninterrupted business continuity as there are no more service disruptions for annual data center maintenance.
- “In\$ite”, the Bureau of Engraving and Printing (BEP) intranet site was upgraded from SharePoint 2013 to SharePoint Online. This upgrade allows users to have greater control of their sites, while the hubs allow a synchronization across related sites, resulting in a standard experience and better search capability.
- The Financial Crimes Enforcement Network (FinCEN) migrated legacy workflow products to Microsoft 365 Dynamics. This provides an improved experience, seamlessly integrating the workflow tool with other Microsoft products, and providing a suite of tools that enables FinCEN to automate workflow processes, analyze data, build specific data processing workflows, and implement investigative and enforcement activity apps.
- The United States Mint (Mint) used SharePoint Online, to modernize their intranet. The “Mintranet”, provides a cleaner look and was reorganized so that content that is most accessed is easier to find and offers a consistent appearance.

- In 2023, the Office of the Comptroller of the Currency (OCC) kicked off an intranet redesign to improve how employees can find information they need to do their job. OCC onboarded search engine experts to improve the intranet search results.

### **Accomplishment #3: Modernizing Legacy Websites and Services**

Efforts continue in legacy modernization through expansion of features offered to the public. These improvements have increased efficiency and reduced administrative costs.

- DO launched the Office of Foreign Assets Control (OFAC) website in April 2023 as a separate but related site to [treasury.gov](https://www.treasury.gov). OFAC's [treasury.gov](https://www.treasury.gov) content, which deals with the sanctions programs, is among the most visited content on [treasury.gov](https://www.treasury.gov) with a broad audience. This content was a natural candidate for user-centered enhancements. It was redesigned to be more user-friendly with content organization based on a combination of site visit analytics, user feedback, and OFAC helpdesk data. The new site includes enhanced searching and sorting capabilities for recent actions and OFAC's vast collection of questions and answers.
- Through the IRS's continued focus on providing an accessible user experience for all taxpayers, the IRS has been deploying additional functionality to its online systems, most prominently with the iterations of Online Accounts (individual, business, tax professional). These applications meet accessibility requirements for online tools and services. The IRS ensures its applications are developed using the Online Design Guide and design standards, in alignment with the USWDS, to ensure consistency across the [IRS.gov](https://www.irs.gov) application domain. Additionally, IRS committed to optimizing [IRS.gov](https://www.irs.gov) search results. In 2023, IRS analyzed the top 400 search terms on [IRS.gov](https://www.irs.gov) site search, leading to adjustments on 94 target pages. This resulted in a 36% improvement in relevancy of search results impacting around 1.5M searches/year.
- FinCEN continues to redesign content areas on [www.fincen.gov](https://www.fincen.gov) to make the site more intuitive and user-friendly. The FinCEN Beneficial Ownership Information (BOI) content area was significantly updated to assist the public with more easily finding and understanding BOI information and filing requirements while still working to provide a consistent overall site design.
- In 2023, TTB automated the issuances of export certificates to U.S. exporters as a service to industry members when foreign markets require certificates as a condition for products to enter their countries. In so doing, TTB vastly reduced the time and expense required for U.S. alcohol exporters to obtain export certificates and minimized the bureau's administrative burden.

### **Accomplishment #4: Measuring Customer Engagement and Service Delivery**

Monitoring engagement through analytics tools, surveys, focus groups, and customer feedback allows Treasury to identify areas for improvements. Treasury remains focused on delivering an optimal experience to the American public as they utilize our services.

- BEP has implemented two tools for internal and external customer engagement analytics, first Google Analytics was implemented for [bep.gov](https://www.bep.gov), and second SharePoint Online's built-in analytics capabilities were implemented for In\$ite. These analytics have allowed BEP to enhance the page promotion strategy for users based on employee engagement.
- Fiscal Service uses surveys on all its major websites, monitors responses and tracks customer

emails and phone calls to their contact centers to understand customer needs and expectations. Fiscal Service measures success over time by monitoring scores and comments from site surveys, analyzes web traffic using Google analytics to validate consistent experience, and reviews contact center data to ensure accessibility of data on the site.

- IRS Online Services (OLS) leverages customer feedback, focus groups, and other information resources to determine how best to structure the [IRS.gov](https://www.irs.gov) site and the content within. For example, card sorts help IRS discern how taxpayers think about and group tax-related information, while user testing gives insight into how customers navigate and utilize [IRS.gov](https://www.irs.gov). Additionally, OLS relies on site surveys and user behavior metrics through Google Analytics (GA4 and Google Tag Manager) to make and assess targeted improvements to site navigation, structure, and content. IRS has fully integrated a customer feedback survey tool (Medallia) into [IRS.gov](https://www.irs.gov) as well as several online applications. OLS regularly conducts targeted research efforts to identify user preferences, needs and expectations for online account features to inform continued enhancement of IRS digital services.
- As a part of Mint's continuous website improvement, CrazyEggs, a website interaction tool was utilized. The tool uses heat maps and in-time snapshots to capture user interactions with the site. Reports are generated and reviewed. This information allows the Mint to pinpoint elements within the page and what portions of the layout most users are interacting with which can either show a positive interaction or frustration. Qualtrics is an experience management tool acquired in 2023 which allows the Mint to formulate survey questions based on data. With the implementation of Qualtrics, the Mint can now measure customer engagement. This information will be used to inform changes to the homepage layout and functionality updates.
- OCC deployed Google Analytics and continues to use SiteImprove and CrazyEggs for site quality assurance. OCC uses these products to monitor user trends, identify and correct operational quality issues, and as input to their content and digital service design strategy. In 2023, OCC piloted the use of Touchpoints for collecting customer feedback and the use of [api.data.gov](https://api.data.gov) for securing and sharing OCC's public API data sets. Full implementation of Touchpoints and [api.data.gov](https://api.data.gov) is expected in 2024.

### **Accomplishment #5: Customer Experience Collaboration**

Fostering a collaborative environment across Treasury bureaus promotes a unified approach in our service delivery. Through knowledge sharing, Treasury can coordinate efforts in providing exceptional customer service by learning how each bureau interacts with the public.

- In 2023, Treasury established a department-wide customer experience (CX) vision – *Earning your trust through reliable, exceptional service* – which provides a foundation for Treasury to implement customer experience practices throughout the Department. Additionally, the Treasury CX Community of Practice (COP) continues to meet quarterly to bring together CX leaders and practitioners from across the Department to share CX best practices. The CX COP is being led by the IRS Taxpayer Experience Office further demonstrating cross-departmental collaboration.
- DO started a quarterly bureau community of practice for administrators using the email subscription service (GovDelivery). These sessions resulted in bureau members exploring new ways to engage and assist the public using this service on some major initiatives in both the short and long-term.

- Implementation of the Inflation Reduction Act (IRA) clean energy credits was achieved through a collaboration between IRS, DO and the Department of Energy. A cross-agency team rapidly analyzed the law and implemented consistent, understandable, and actionable guidance to the public that was coherent across government websites under tight deadlines. The web content was worked and implemented in an iterative manner and post-deployment analytics indicated overwhelmingly that the public was consuming and acting on the content as expected.
- Conversations with other government agencies have led to specific design improvements for the myTTB authorization model that provides more flexibility for TTB and their customers. TTB has also engaged with the General Services Administration's Centers of Excellence to help mature CX practices at TTB and sequence myTTB modernization work.

### **Implementation Challenges**

Treasury's greatest challenges in implementing the 21st Century IDEA initiatives continue to be funding and resource prioritization. Sustainment of support and coordination of resources is essential to ensuring our digital services and websites align with 21st Century IDEA. In addition, the September 2023 issuance of [M-23-22: Delivering a Digital-First Public Experience](#) requires increased attention on continuous improvements and new reporting requirements.

Competing priorities, including addressing cyber-related mandates and implementing new jurisdictional responsibilities and programmatic initiatives, require ongoing tradeoffs across programs and projects, including planned modernization efforts. Ensuring that systems are modernized, and enhancements are deployed is also a massive undertaking. The IRS serves more taxpayers, businesses, non-profits and other entities than all other federal agencies. Limited resources compiled with increasing costs has led to a backlog of needs, such as infrastructure upgrades, that must be addressed.

### **Conclusion**

Treasury's commitment to 21st Century IDEA adoption remains steadfast. [Modernizing Treasury operations](#) plays an integral part in the [2022-2026 Treasury Strategic Plan](#), highlighting Treasury's pledge to work hard to deliver an improved digital experience to the American public. The agency aims to balance modernization initiatives with ongoing cybersecurity and legislative responsibilities. Our focus will continue on applying 21st Century IDEA in alignment with the [Treasury Strategic Plan](#), [President's Management Agenda](#) and [M-23-22: Delivering a Digital-First Public Experience](#).

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