

Delivering Taxpayer Engagement Solutions with Live Agent Support

Tax dollars collected each year during filing season by the Internal Revenue Service (IRS) are critical for funding our Nation's national defense, veteran affairs services, community development, and law enforcement. During Fiscal Year (FY) 2021, the IRS collected more than \$4.1 trillion in gross taxes, processed more than 261 million tax returns and other forms, and issued more than \$1.1 trillion in tax refunds.

Challenge

At the onset of the COVID-19 pandemic, millions of Americans were facing unprecedented economic hardships. In response, Congress passed monumental legislation, including the Coronavirus Aid Relief, and Economic Security (CARES) Act, the Consolidated Appropriations Act and the American Rescue Plan Act (ARPA). Designed to mitigate the sharp economic decline that was unfolding while providing much-needed relief to struggling families, qualified citizens were issued stimulus checks through Economic Impact Payments (EIP) and Advance Child Tax Credits (ACTC).

These programs required the IRS to deploy refunds and payments at a substantially accelerated rate, as well as quickly ramp up the IRS customer service team to address the anticipated increase in call volume. The IRS required a remote operations environment with an Artificial Intelligence solution to address calls with no tax issues, so the tax-related calls could go directly to IRS agents for faster resolution.

Services Provided:



- Best-in-class, secure, cloud based, omnichannel call center solution
- First ever work from home IRS call center technology infrastructure
- Industry leading CSR training and supervision via Teams and Amazon Web Services with secure protocols
- Advanced technology learning models including Speech Analytics and Maximus Virtual Intelligent Assistant MVIA voice response AI

Success Achieved:



- Scaled to 3,200 qualified CSRs within 30 days of initial request to address surge requirements
- Delivered remote training for Customer Management System to expedite CSR readiness
- Responded to more than 70,000 calls a day during peak volume periods
- Managed more than 5,000,000 inquiries in 2021

A surge of more than 10,000 taxpayers in the call queue prompted a mobilization of more than 500 additional team members within five days of the initial request. To support such a large surge of activities, Customer Service Representatives (CSR) staffing program activities included training, telephony services, human resource management, operations support, technology solutions, and program management. This mobilization laid the groundwork for expectations for future modernization and improvements to the taxpayer experience. The final solution would require a Work From Home (WFH) infrastructure to assist the growing remote staff adhering to stay at home orders necessitated by the pandemic.

Approach

Maximus has been a trusted partner of the IRS for more than 30 filing seasons. Our teams are deeply rooted within the organization and invested in its critical mission to serve American taxpayers. We maintain, support, and operate the technology that ensures Americans can file timely, secure, and accurate tax returns so that resulting funding is continuously available for the U.S. Federal Government programs as well as to ensure tax returns are processed efficiently for citizens.

With a long history of government expertise, Maximus understands the evolving regulatory requirements within agencies and customer requirements to support those changes. The IRS relies on Maximus to bring modernization recommendations that ensure security and mission success through best-in-class transformation services.

Benefits of this work from home, CSR staff augmentation approach included:

- Advanced citizen engagement through a cloud-based, omnichannel functionality, providing anytime, anywhere citizen engagement.
- Optimized call center, omnichannel strategy that successfully addresses any significant surge in call volume to support peak call volumes.
- Streamlined business processes through call and screen recording, data analytics, and artificial intelligence.
- Enhanced reporting framework for actionable business and operations insights.

Results

By providing recruiting of CSRs, program reporting, technology support systems, and software quality assurance within a timeframe, the Maximus team enabled the IRS to implement a large-scale call center solution by:

1. Supporting the establishment of a new Economic Impact Payments (EIP) call process for citizens regardless of their tax payment status.
2. Developing unique, legislation-guided answers to Frequently Asked Questions based on the taxpayer inquiry calls being received.
3. Scaling the call center to 500 agents within the first seven days of contract award with a subsequent ramp-up capability of more than 3,000 agents within the first 30 days.
4. Adding capabilities to address Advanced Child Tax Credit status calls to the Live Agent responsibilities.

Maximus's Live Agent provided a proven, omnichannel engagement technology and service solution that specifically addressed gaps in coverage and resources for the IRS during peak demand. The IRS advanced service delivery efficiencies, increased customer satisfaction ratings, and enhanced the overall taxpayer experience.

We can empower you to innovate with agility and scale, delivering impactful outcomes and exceptional customer experiences. Learn more at [maximus.com/IRS](https://www.maximus.com/IRS)

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