

How the IRS is making published products more “Accessible”



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the presenter during this
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represent the official opinion of
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Overview

- **Section 508**
- **Why make products accessible**
- **How will we get there**



IRS Mission Statement



Provide America's taxpayers top quality service by helping them understand and meet their tax responsibilities and by applying the tax law with integrity and fairness to all.



Accessibility

What does it all mean?



Section 508 of the Rehabilitation Act

- Section 508 requires that when Federal agencies develop, procure, maintain, or use **electronic and information technology**, they shall ensure that Federal employees and members of the public with disabilities have comparable **access** to and use of information and data provided to individuals without disabilities, unless an **undue burden** would be imposed on the agency.



What does “accessible” mean?

- **In general, an information technology system is accessible to people with disabilities if it can be used in a variety of ways that do not depend on a single sense or ability.**



What is Section 508 about?

- **It is not about...**
- **adaptive technology,**
- **providing reasonable accommodations to individuals, or**
- **the size of the population of persons with disabilities.**
- **It is about...**
- **accessible information technology with or without adaptive equipment.**



Software Applications and Operating Systems (excerpts)

- **Color coding shall not be used as the only means of conveying information, indicating an action, prompting a response, or distinguishing a visual element.**



- **When electronic forms are used, the form shall allow people using assistive technology to access the information, field elements, and functionality required for completion and submission of the form, including all directions and cues.**
 - *(also applies to web pages)*



Agency Initiatives



- **IRM 102.1, Introduction to Systems Standards Profile** sets forth agency accessibility requirements for all tax administration processing systems, administrative systems (such as Employee Express, RTS, TIMIS, TRAS), office automation software, Internet/Intranet access, and all materials and programs accessed by the general public. The full contents of IRM 102.1 may be viewed at publish.no.irs.gov/irm/P02/pdf/30888I00.PDF
- **December 3, 2000, memorandum from the Chief Information Officer to all IS Executives regarding the Implementation of Section 508 of the Rehabilitation Act**
- **Information about Section 508 implementation is posted on the IRAP web site at <http://irap.no.irs.gov>**



Next Steps

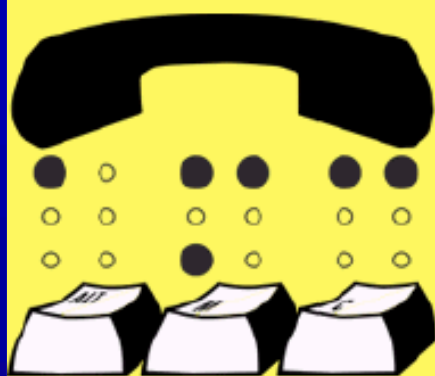
- **To comply with the requirements of Section 508, the organization will need to:**
 - **Raise the level of awareness of accessibility issues within our organization**
 - **Involve employees with disabilities in the design, testing and procurement of products and services**
 - **Establish a Section 508 Forum**
 - **Support the Agency's biennial 508 self-assessment as required by DOJ**



External Resources

- **Information and support is available from a number of external sources, including...**
- <http://www.access-board.gov>
 - **Access Board web site**
- <http://www.section508.gov>
 - **Federal IT Accessibility Initiative web site**
- <http://www.microsoft.com/insider/mi/pfwebaccess.htm>
 - **Microsoft Accessibility, Technology for Everyone web site**
- <http://www.trace.wisc.edu>
 - **Trace Center web site, College of Engineering, University of Wisconsin - Madison**





ALTERNATIVE MEDIA CENTER

Alternative Media Center

The Alternative Media Center (AMC) is being established to meet the needs of employees and taxpayers with disabilities for information in alternative media. Braille, large print, CD-ROM and other electronically accessible media forums such as Intranet and Internet sites will be provided by the AMC to meet the needs of its customers. If you have any questions, please feel free to contact the [Alternative Media Center](#) or Mike Moore at (202) 622-8918.

- [Home](#)
- [Weekly Updates](#)
- [AMC Forum](#)
- [Order 2002 Tax Products](#)
- [Access Unlimited](#)
- [Text](#)

[Speech Friendly PDF Forms](#)

[Status Reports](#): Weekly updates on AMC projects

[Items of Interest](#): 2002 NTEU Member Benefits Guide

[Braille Tax Products for 2002](#) have already been ordered. The AMC will accommodate additional requests.

Check out the [AMC Forum](#). The AMC Forum allows IRS Employees to discuss hot topics concerning the disabled community. This forum provides bulletin board like threaded messaging. Click for [Introductory FAQs](#).



Project Timeline

- **August 2000 -**
 - Initial date the guidelines were to be issued
- **December 21, 2000 -**
 - Section 508 guidelines published in the Federal Register
- **January Through April 2001 -**
 - Review of Section 508 to determine impact on operations
- **January through April 2001 -**
 - Needs assessment survey of visually impaired employees (Training materials #1)
- **April 2001 -**
 - Selection of internal and public forms to test accessibility workflow



Timeline continued

- **April 2001 -**
 - Release of Acrobat 5.0
 - Acquisition of JAWS Software (Delayed until October) (Installation delayed again due to IRS software conflicts)
- **June 2001 -**
 - Continued testing of software and forms design workflow - Contractor hired (Plexis)
- **July 2001 -**
 - Training of analysts on JAWS software and accessibility requirements (Delayed until Feb. 2002)
- **Fall 2001 -**
 - Distribution of Acrobat 5.0 to all visually impaired employees (Delayed until March 2002)



Who are the Key Team Members

- **Alternative Media Center (AMC)**
 - **Visual Information Specialists**
- **Publishing Services Branch**
 - **Forms Design Analysts, Printing Specialists**
- **Tax Products Branch**
 - **Composition Team**
- **Tax Forms and Publication Division**
 - **Tax Law Specialists**
- **Accessibility Review Team (ART)**
 - **12 Blind or Visually Impaired IRS employees**
- **Outside Contractors**



Other Team Members

- **IRAP**
 - **Information Resources Accessibility Program**
- **Freedom Scientific**
 - **Creators of JAWS application**
- **GW Micro**
 - **Creators of Window Eyes application**
- **Adobe Corporation**



What are our Goals

- **Provide accessible products to our customers**
- **Improve certain work processes to enable easier conversion**
- **Set up a vehicle for customer comments and feedback (Web site)**
- **Become compliant with Section 508, 504, 501**



Tax Forms Process

- **Prioritize the 2001 Tax Products**
- **Begin modifying fillable fields**
- **Set up coordination between AMC personnel and Tax Law Specialists**
- **Prepare scripts in Word**
 - **Receive OK from TLS**
- **Preview draft tax forms**
 - **Have TLS inform us of changes**
- **Final OK to Print is received**



Top 100 Tax Forms to be made accessible for Tax Year 2001

Form 1028	Form 2441	Form 8829
Form 1040 Series	Form 2553	Form 8832
Form 1041	Form 2848	Form 8863
Form 1041 Schedule D	Form 3903	Form 940
Form 1041 Schedule K-1	Form 4506	Form 940 EZ
Form 1065	Form 4562	Form 941 Schedule B
Form 1065 Schedule D	Form 4684	Form 941-A
Form 1065 Schedule K-1	Form 4797	Form 941-C
Form 1096	Form 4852	Form 941-J
Form 1096 2001	Form 4868	Form 941-Y
Form 1098	Form 4972	Form 945
Form 1098-E	Form 5329	Form 990
Form 1098-T	Form 5500	Form SS-4
Form 1099-A	Form 6251	Form SS-8
Form 1099-D	Form 706	Form W-2
Form 1099-I	Form 709	Form W-2 2001
Form 1099-M	Form 8109-B	Form W-2C
Form 1099-M 2001	Form 8283	Form W-3
Form 1099-R	Form 8332	Form W-4
Form 1099-S	Form 8379	Form W-4 2001
Form 1120	Form 8396	Form W-4P
Form 1120	Form 8453	Form W-5 2001
Form 1120-S	Form 8606	Form W-7
Form 2106	Form 8633	Form W-8
Form 2106 EZ	Form 8812	Form W-8 B
Form 2210	Form 8812	Form W-9



Other Factors

- **Redesign of Tax Forms to make them more accessible**
- **New Software to design Tax Forms**



Internal Forms

- As each new internal form is created, it will be analyzed to determine if it must be made accessible (example: forms for truck drivers – No; forms for data entry clerks – Yes; Forms that must be filled out on paper – No) (Alt tags will be used to describe image), etc.)
- Product originators will be briefed on accessibility
 - (Why, How, When, etc.)
- Verbalized data will be agreed upon (approved)
- Form will be designed – Made fillable – Made accessible
 - Then run against accessibility plug-in for Acrobat
- Form will be checked by ART

A list of current forms used by the visually impaired in IRS will be made accessible first. These will be done in conjunction with the newly created or revised products.



Thank you

For more information on
IRS products and services,
please visit our web site,

www.irs.gov

