IEP 2.0 Performance Work Statement

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C.1   INTRODUCTION

The Internal Revenue Service (IRS), Web Infrastructure Services (WISD), has embarked on a transformation for its web portals referred to as the Integrated Enterprise Portals (IEP). The IRS seeks a qualified Managed Service Provider (MSP) to deliver, operate, and manage the IEP services and to evolve IEP services as needed to support the changing dynamics of the many requirements due to Congressional mandates placed on the IRS.

The IEP MSP provides the IRS with secure application hosting services, allowing it to deliver business functionality to its various stakeholders, including taxpayers, tax preparers, and employees. The IEP MSP delivers these services through fully scalable, virtualized environments and cloud services that are dedicated to the IRS. The IEP provides fully integrated core services, including IT infrastructure, operations, security, application, integration and support, and program management services, to establish a fully integrated robust platform that supports multiple workloads, also referred to as Portals and major applications, and application styles. (Refer to the Solicitation Section J, Attachment X.X, *Current State of the IEP Systems and Services*, for details of the existing landscape).

The Government is seeking MSP support to provide fully managed, scalable hosting services for applications that are accessed by IRS' external stakeholders and its internal customers. The selected Contractor will be responsible for providing all labor, hardware, software, equipment, materials, communications, facilities, and other necessary IT infrastructure to implement, deploy, operate, manage, and support the IEP-hosted applications and services in a Federal Information Security Management Act (FISMA) moderate secure environment, as well as its underlying technology infrastructure.

C.1.1 BACKGROUND

According to the Internal Revenue Manual (IRM) Part 2.25.2, the IRS standards dictate that "…interactive and batch electronic connections are organized through as few portals as feasible and that the use of those portals is appropriate to the IRS' mission." The current IEP has evolved into primary gateway for external users – including taxpayers, third-party tax preparers, and other business partners – and internal users – IRS employees and contractors with staff-like access – to access IRS business services.

The current IEP vendor provides a range of application development, hosting, security, and operations services for over 90 IRS business applications. Some of the IEP-hosted application suites, such as Modernized eFile (MeF) and Integrated Customer Communications Environment (ICCE), include multiple applications that are critical to the IRS' core mission: delivering a successful Filing Season annually.

The IEP 1.5 vendor delivers IEP capabilities through managed services. Table 1: IEP 1.5 Contract Service Areas provides a brief overview of the IEP contract service areas.

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Table 1: IEP 1.5 Contract Service Areas

IEP 1.5 Service Area	Description
Portal Service and Program Integration Services	Provide IEP program and contract management to ensure quality service delivery.
Portal Infrastructure Services	Provide and manage a cloud-like, private, virtualized infrastructure to host the IEP environment and services.
Portal Web Hosting Services	Provide comprehensive hosting support for applications accessed by external users and organizations. Services include IEP monitoring, incident management and application infrastructure Integration.
Portal Security Services	Deliver IEP Active/Edge Cyber defense and analytics. Services include security compliance and ATO maintenance.
Portal Application Services	Provide full life-cycle engineering support for IEP-hosted applications, including operations and maintenance. Services include IRS.gov content management hosting.
Portal Website Help Desk Services	Provide the IRS.gov Help Desk for taxpayers, including IEP website questions and navigation. (Help Desk services are not included in IEP 2.0)
Transition of Portal Operations Services	Provide IEP services operations transition to other IRS designated service provider(s).

The IEP 1.5 is designed and implemented to modernize the IRS technology platform with a fully scalable, managed private cloud capability to provide a consistent, unified customer experience in a cost-effective manner. Figure 1: IEP 1.5 High-Level Architecture provides a brief illustration of the system.
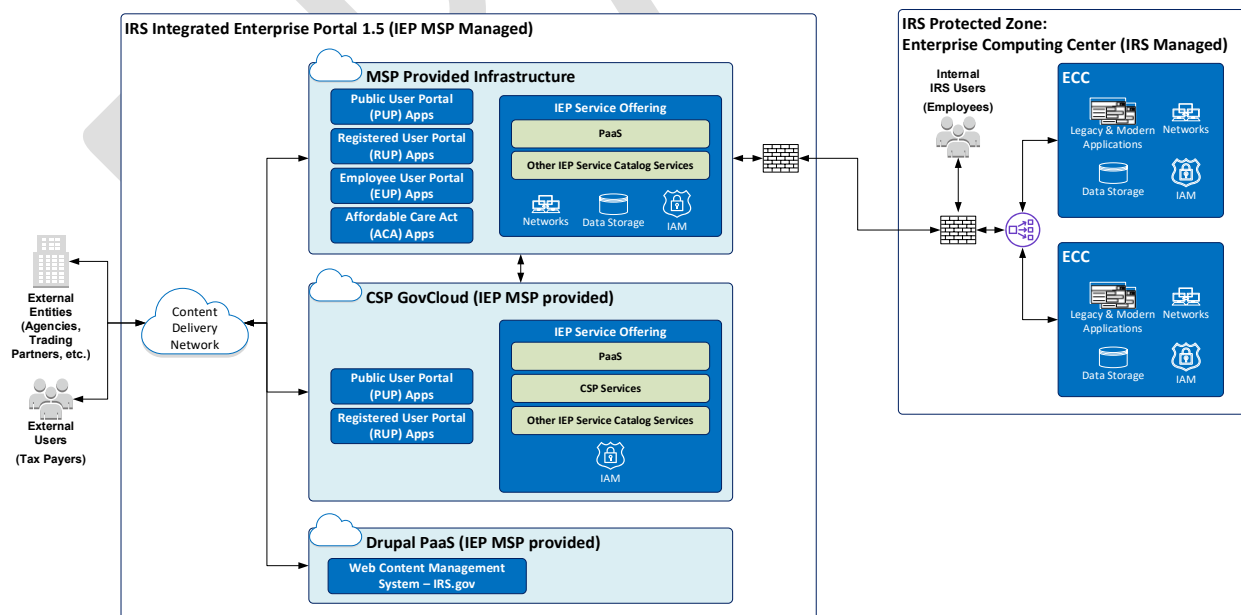
Figure 1: IEP 1.5 High-Level Architecture

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The IEP vendor delivers web-based services for internal and external users through multiple integrated sub-components. These components are described below.

Table 2: IEP 1.5 Components

IEP Component	Description
Public User Portal (PUP)	• Consists primarily of the www.irs.gov website and was created to be the online presence of the IRS • Disseminates tax news and information • Intended to store non-Sensitive But Unclassified (SBU) information that pertains to Treasury Department Publication (TDP) 85-01 regulations
Registered User Portal (RUP)	• Provides the essential security and technology components required for web access to modernized IRS business applications • Comprised of a web-enabled, electronic commerce infrastructure that provides secure browser-based application services for tax practitioners and taxpayers
Employee User Portal (EUP)	• Provides IRS employees and registered users with web-enabled access to conduct tax administration transactions through both the portal and Enterprise Application Integration Broker (EAIB) systems
Transactional Portal Environment (TPE)	• Provides the essential security and technology components required for secure structure data exchange between the IRS and the Centers for Medicare and Medicaid Services (CMMS) and other agencies external to the IRS

In addition to the components described above, the IEP vendor has been tasked to implement and support additional hosting solutions that enable the IRS mission, including establishment of common services to support Treasury Cloud integration.   Figure 2: IRS Cloud Workload High-Level Architecture depicts the cloud integration.

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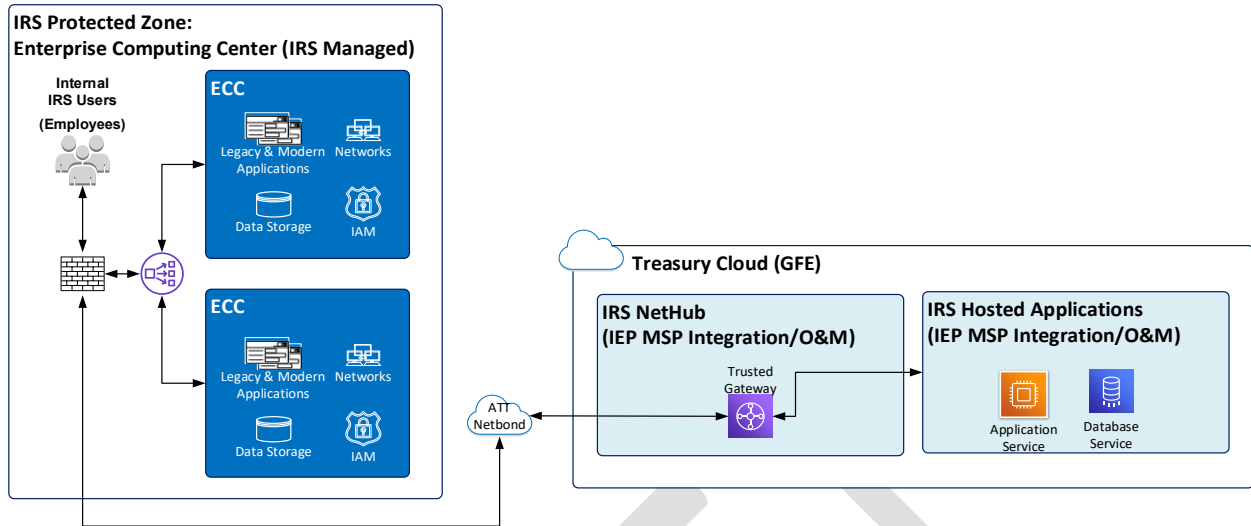
Figure 2: IRS Cloud Workload High-Level Architecture

C.2   IEP 2.0 OBJECTIVES

The IEP vendor provides services that support the IRS core mission, annual delivery of Filing Season. Continuity of IEP services to support current and future services and technologies is key to supporting the IRS mission.

The IEP 2.0 Acquisition has the following objectives:

- Ensure continuity for IEP services and provide access to IRS business systems and services and Taxpayer Transmission capabilities.

- Provide IEP services that efficiently leverage technology over the project's life cycle and accommodate service changes driven by IRS policies and business mandates.

- Complete transition of all IEP services to approved IEP 2.0 operations prior to the end of IEP 1.5 contract period of performance.

- Enhance IRS oversight and accountability for IEP services by using efficient IT service management processes to continually improve taxpayer experience and enhance customer service.

The IRS requires vendor support to provide expertise in program and project management, technical solutions and analysis, and system integration support to integrate modernized business solutions into the IRS. The support is required in all dimensions of the IEP 2.0 Program, including developing and supporting the deployment of new applications to meet IRS future business needs.

C.2.1 Contract Assumptions

The below section describes the contractual assumptions.

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Table 3: Contract Assumptions

Assumption Description
IEP will continue to be the primary means for the IRS to provide business services to external stakeholders (e.g., taxpayers). based on current IRS policy (primary purpose of the portal is to support external interactions, not internal)
The portal will be required to support currently undefined/unknown future IRS business requirements and needs based upon previous historical precedence (e.g., ACA, FATCA, ECM)
Enterprise Operations (EOps) will be the organization responsible for the oversight and management of the IEP services (run by the Director of WISD)
The solution/alternative will minimize unplanned organizational change impacts to business processes and roles/responsibilities
IEP services will support cloud-based application and data hosting solutions
IEP services will support legacy hosting environments
IEP services will be able to scale up and scale down according to demand
Current/modern technology will be leveraged and inserted as it becomes available and driven by business requirements
IEP services will provide users with the ability to monitor application performance in IEP environments
The solution will provide an integrated view of portal services.
The solution/alternative will provide additional visibility into service costs (e.g., O&M costs by application).
Service levels will be optimized to meet IRS requirements
IEP service management processes will be able to integrate with IRS processes.
IEP services will support migration of at least 20 IEP legacy applications to the cloud per year.
IEP services will integrate with other IRS MSPs.
IEP services will be capable of supporting emerging IRS application and common services standards.
IEP services may be utilized to modernize applications.
IEP services will comply with applicable IRS common services and standards.

C.2.2 Contract Constraints

The below section describes the constraints associated with the contract.

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ELM ID	IEP 2.0 Req ID	Constraint Description
1364803	PLS-PLC-400	Constraint: Delivery of the proposed solution must comply with all applicable Internal Revenue Manuals (IRMs) - refer to the Solicitation Section C, Appendix B - References.
1364804	PLS-PLC-500	Constraint: In the absence of IRS policy, delivery of the proposed solution must comply with all applicable National Institute of Standards and Technology (NIST) Special Publications and manuals, Current Version.
1364805	PLS-PLC-600	Constraint: The proposed solution must provide an IT infrastructure where all facilities, hardware, software, network, and network connections are located in the United States of America.
1364807	PLS-PLC-800	Constraint: The proposed solution must deliver an infrastructure, including the operation of all devices, in a dual stack (IPv4/IPv6) environment in compliance with FAR requirement on Internet Protocol Version 6 (IPv6) - refer to FAR Section 511.170 Information Technology Coordination and Standards.
1364808	PLS-PLC-900	Constraint: All items delivered in the proposed solution and throughout the lifecycle of this contract must function and transmit, receive, and process data by using the IPv6 in compliance with current USGv6 Profile - refer to NIST SP 500-267B Revision 1.
1364907	PLS-PLC-1200	Constraint: All solutions must comply with the IRS One System Development Lifecycle processes, where applicable.
Pending	PLS-PLC-1210	Constraint: IEP services must align to key IRS strategic initiatives (e.g., Modernization Plan, Technical Roadmap)
Pending	PLS-PLC-1220	Constraint: IEP services must comply with Government security, privacy, and regulatory requirements (e.g., FedRAMP security controls, NIST SP 800-53, HIPAA, NARA)
Pending	PLS-PLC-1230	Constraint: The ability of IRS IT organization to hire additional staff with appropriate skillsets will be limited.

C.3   SCOPE OF WORK AND DESCRIPTION OF TASKS

This Performance Work Statement (PWS) describes the scope and expectations for a Performance-Based Acquisition with mission-oriented, outcome-driven performance measures and incentives. The scope of work to be performed is envisioned to include the following distinct operational areas:

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Table 4: IEP 2.0 Contract Service Areas

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IEP 2.0 Service Area	Description
IEP Service and Program Integration Services	Provide IEP program and contract management to ensure delivery of high-quality integrated services.
IEP Infrastructure Services	Provide and manage an infrastructure to deliver the IEP environments and services.
IEP Application Hosting Services	Provide comprehensive hosting support for applications accessed by external users and organizations. Services include IEP monitoring, service management, and application infrastructure integration.
IEP Security Services	Provide secure IEP environments to minimize risk to IRS data, applications, services, and users. Deliver IEP Active/Edge Cyber defense and analytics. Services include security compliance and ATO maintenance.
IEP Application Services	Provide full life-cycle engineering support for IEP-hosted applications, including operations and maintenance.
GFE Cloud Services	Provide IEP services needed to support application hosting, integration, and operations for IRS workloads provisioned and deployed in IRS provided cloud environments.
IEP Transition Services	Provide IEP services operations transition to and from other IRS designated service provider(s) while minimizing risks to IEP service continuity and operations.

C.3.1   IEP Service and Program Integration Services

The objective of the IEP Service and Program Integration Services is for the vendor to provide the management necessary to deliver IEP services at the quality levels defined by the applicable service level objectives (SLOs). The requirements in this section are intended to request solutions from the vendor regarding how it will ensure quality service delivery.

C.3.1.1   Program Management

ELM ID	IEP 2.0 Req ID	Contents
1369972	PSPIS-FR-100	The Contractor shall document and maintain a Program Management Plan that describes management processes, risk management (including supply chain risks), organizations, and tools that will be used to ensure timely delivery of quality products and services. The Contractor shall define the Program and Project Management approach to integrate program management activities and effective service delivery across all task orders issued for IEP services.
1369974	PSPIS-FR-1100	The Contractor shall provide a Program Manager who will be responsible for all IEP 2.0 contract service delivery and work performance. The position of Program Manager is considered to be a Key Personnel. The Program Manager shall ensure that the Contractor satisfies all requirements.

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ELM ID	IEP 2.0 Req ID	Contents
1369975	PSPIS-FR-1200	The Program Manager will serve as the primary focal point for communication with the IRS IEP Program Manager, IRS Executive and Senior leadership, the Contracting Officer (CO), and the CO's Representative (COR). The Program Manager shall act as the central point of contact with the Government for all program-wide technical issues, and provide Program Management and Control to manage all IEP services performed under this contract within specified scope, quality, time, and cost objectives.
1369977	PSPIS-FR-1400	The Contractor shall identify subordinate functional and/or technical Project Managers to lead all IRS Integrated Enterprise Portal (IEP) key processes and ongoing project work. .
1369978	PSPIS-FR-1500	The Contractor shall participate in periodic and ad hoc meetings with the Government, as defined by the Task Orders awarded under this contract.
1369979	PSPIS-FR-1600	The Contractor shall support meetings with the Government, including: agendas, meeting materials (as required), meeting minutes, and action items.
1369989	PSPIS-FR-2500	The Contractor shall collect and report Earned Value Management (EVM) data for work designated as Development Modernization or Enhancement (DME) in compliance with the provisions of the latest Treasury Acquisition Bulletin and the Treasury Earned Value Management Guide. EVM reporting will only by required for those projects which are within the thresholds established in the Treasury EVM Acquisition Bulletin.
1369971	PSPIS-FR-3090	The Contractor shall: include all budget amounts in the reported EVM data, whether allocated or not, load such data into all required formats of the Contract Performance Report (CPR) and ensure validity before transmitting to IRS. The calculation of EVM metrics (e.g., BCWS, BCWP and ACWP) shall comply with the guidelines and rule sets established in the Treasury EVM policy. Undistributed Budget (UB) will only be reported at the WBS level associated with the appropriate contract, task order or interagency agreement.
1369948	PSPIS-FR-3120	The IRS requires CPR formats 1, 3 and 5 to be provided on a monthly basis.
1369994	PSPIS-FR-300	The Contractor shall document a staffing plan in its Program Management Plan that details how it will ensure that it can effectively staff new projects.
1369946	PSPIS-FR-3010	The Contractor shall deliver a Project Management Plan (PMP) to document its processes and procedures to manage and control project execution. The PMP shall include a scope statement, including project deliverables, Work Breakdown Structure (WBS), project schedule, project organization including roles and responsibilities, and the results of an initial risk assessment of the project. The PMP shall also document the Contractor's approach to performing change management and version control for contract deliverables and work products, quality management, and risk management.
1369957	PSPIS-FR-3020	The Contractor shall document an Operations Management Framework that clearly delineates their managed service lifecycle approach including, at a minimum, the equivalent of the most current version of ITIL practices.
1369969	PSPIS-FR-3070	The Contractor is required to maintain and report detailed information about project performance, schedule and cost, as well as activity progress, on a monthly basis for project control.

ELM ID	IEP 2.0 Req ID	Contents
1369970	PSPIS-FR-3080	The Contractor shall prepare and submit a Contract Performance Report (CPR) each month describing the amount of work scheduled and achieved to date and the actual costs associated with that work (Format 1), baseline (Format 3), and variance analysis and explanations (Format 5). The Contractor shall prepare and submit the IRS Contract Performance Reports. All tasks supporting a single deliverable or work product, regardless of the owner/supplier of each task, shall be organized together and roll up to a single CWBS element and summary level task in the project schedule.
1369996	PSPIS-FR-3100	The Contractor shall develop a detailed project schedule that provides sufficient detail to effectively manage the project and minimize delivery risk.
1369949	PSPIS-FR-3130	The Contractor shall establish an overall framework for planning and executing continuous improvement for IEP. Contractor shall reserve 1% of the awarded contract value for innovation activities. The management and spending of innovation funding and its associated innovation activities shall follow IRS Innovation governance process.
1369950	PSPIS-FR-3140	The Contractor shall support all changes as needed by the IRS to the underlying SLO for Performance Targets around Requests, Changes and Releases on the IEP. The Contractor shall routinely report Service Level Objectives metrics.
1369951	PSPIS-FR-3150	The Contractor shall comply with Section 508 of the Rehabilitation Act of 1973 and any related IRS guidelines.
Pending	PSPIS-FR-3210	The Contractor shall deliver all formal and work products by following IRM 2.150.2.3 Configuration Identification Index and Document Versioning Guidelines.

C.3.1.2   Service Delivery

ELM ID	IEP 2.0 Req ID	Contents
1369981	PSPIS-FR-1800	The Contractor shall provide support to IEP stakeholders for IRS governance boards, as required.
1369983	PSPIS-FR-200	The Contractor shall document, execute and maintain a Service Delivery Framework that follows the IRS enterprise processes and incorporates industry best practices (e.g., ITIL). The Contractor shall obtain IRS permission prior to deviation from any IRS enterprise process.
1370005	PSPIS-FR-400	The Contractor shall provide a Communications Plan that describes its stakeholder engagement approach to ensure customer satisfaction.
1408937	PSPIS-FR-430	The Contractor shall provide an integrated service dashboard view across all service areas for near-real time visibility of critical service metrics and status conditions.
1375393	PSPIS-FR-410	The Contractor shall provide an integrated service dashboard with the capability to show service consumption information necessary to reflect service unit consumption and cost over specified time periods. The service consumption information should include granularity necessary to understand IEP hosting costs per hosted IRS application ecosystem (i.e.: at the IRS business service level).

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ELM ID	IEP 2.0 Req ID	Contents
Pending	PSPIS-FR-415	The Contractor shall provide all data/information generated under this contract to the IRS when requested. This includes all data generated by Contractor solutions (e.g., log files, system configuration), as well as information generated through support services (e.g., OEM ticket information, slides, capacity reports).
1375394	PSPIS-FR-420	The Contractor shall perform continuous process improvement for IEP processes across all IEP services. The objective for IEP process improvements should focus on improving the service delivery quality and reflect improvements considered beneficial to the IRS The Contractor will work with IEP staff and stakeholders to identify beneficial targets for improvement.
1408933	PSPIS-FR-110	The Contractor shall comply with the IRS delivery model process for new projects, as required in accordance with IRM 2.16.1.
1408934	PSPIS-FR-1110	The Contractor shall allocate Program Management costs to a single active task order.
1408935	PSPIS-FR-1410	The Contractor shall empower Project Managers to coordinate with IRS stakeholders and make decisions to facilitate task delivery
1408932	PSPIS-FR-1810	The Contractor shall be capable of providing administration support for the operation of an IEP Technical Review Board (Solicitation Section J, Attachment, *EOps TRB SOP*).
1408938	PSPIS-FR-440	The Contractor shall provide an integrated service dashboard with the capability to display any operational data reporting elements specified in IEP service area requirements.
1408939	PSPIS-FR-450	The Contractor shall provide an integrated service dashboard capable of tracking service request status from service initiation through service fulfilment. Once the service is operational, the dashboard should display the critical service metrics along with actionable insights and drilldown capability to the lowest service component supporting the service delivery.
1369965	PSPIS-FR-3030	The ITIL Operations Management Framework shall establish a sound Operations program that maintains the integrity of the IRS Integrated Enterprise Portal Program systems and provides operational continuity for activities performed in the environment. It shall enable repeatable service management of Information Technology (IT) components as they evolve in all stages of portal development and transition, and into operations. Any updates to this framework will be provided on a semi-annual basis.
1369966	PSPIS-FR-3040	The Contractor shall propose an ITIL-based Service Strategy process in partnership with the IRS to seek new solutions and initiatives for business problems, and provide proactive recommendations and assessment.
1369967	PSPIS-FR-3050	The Contractor shall develop and maintain an Integrated Master Schedule which incorporates the Contractor, sub-contractor and IRS stakeholder detailed tasks necessary to ensure successful project execution.

ELM ID	IEP 2.0 Req ID	Contents
1369968	PSPIS-FR-3060	The Contractor shall propose a methodology for program measurement in the Quality Assurance Program, including a process for developing, implementing, and monitoring a set of performance measures to ensure that program activities are effectively and efficiently supporting both business and IT strategies. This includes implementing program-wide measures, quantifiable outcomes, and providing an approach for monitoring actual-versus-expected performance.
Pending	PSPIS-FR-3220	The Contractor will develop solutions that utilize enterprise common services and standards.

C.3.1.3 Service Integration Work Request Support

The objective of Service Integration Work Request Support is for the contractor to be capable of providing additional services to meet work request requirements.

The Contractor, at the option of the IRS, may be tasked to deliver additional IEP services to support new capabilities in response to evolving IRS business requirements and legislative mandates. When required, the Government will issue Work Requests (WRs) for the Contractor to perform this work. These work requests are intended to be in addition to forecasted IEP service demand and capacity flexibility as required by IEP capacity, scalability, and performance management requirements.

ELM ID	IEP 2.0 Req ID	Contents
2559808	PSPIS-FR-3160	The Contractor shall be capable of supporting IRS issued work requests (WR) to support new IRS capability requirements.
2559809	PSPIS-FR-3170	The Contractor shall integrate the IEP WR process with the service catalog and IEP governance processes (e.g., Technical Review Board, Solicitation Section J, Attachment, *EOps TRB SOP*).
2559810	PSPIS-FR-3180	The Contractor shall develop a WR process to include developing a Very Rough Order of Magnitude (VROM) estimates to support the approval process for draft WRs in accordance with IRM 2.22.1 Unified Work Request (UWR) Process.
2559811	PSPIS-FR-3190	The Contractor shall provide VROM estimates and WR responses that include the following: a. Description of the technical work to be accomplished to deliver WR requirements b. Planned schedule to support the WR and meet the WR objectives c. Level of Effort estimates based on IEP services required to support the WR d. Assumptions and Constraints associated with the proposed technical solution, cost and schedule

C.3.1.4 Support for IRS Enhanced Activities

The objective of Support for IRS Enhanced Activities is for the Contractor to be capable of supporting IRS activities and support requirements for enhanced activities such as Filing Season and Affordable Care Act (ACA) Open Enrollment. Support includes accommodating increased traffic volume for business systems, enforcing more stringent deployment guidelines, and enabling enhanced service management requirements (e.g., Incident Management, Problem Management, and Capacity Management). During readiness activities, there is a specific escalation of approval levels defined in the IRS Production Environment Control Process for business services and applications impacting production environments.

IRS conducts Filing Season every year, usually extending from January 1st through April 30th. During the Filing Season, IRS expects increased traffic volume for business systems. Accordingly, IRS usually performs readiness activities prior to the Filing Season and implements enhanced Filing Season support activities during the Filing Season.

IRS ACA Open Enrollment periods are defined as periods when a large number of citizens are expected to enroll in the ACA via a healthcare exchange and when information verification will be required with IRS via the IEP ACA TPE and ISS. A large number of transactions on the IEP ACA TPE and ISS are expected during this period. This period has generally occurred during the following months:

1.   Annual Exchange Enrollment Period: January – April – 1095B/C Submission Period

2.   Exchange Enrollment Period: November – January

Accordingly, IRS usually performs readiness activities prior to Open Enrollment period and enables enhanced support activities during the Open Enrollment period.

ELM ID	IEP 2.0 Req ID	Contents
1369984	PSPIS-FR-2000	The Contractor shall ensure IEP services meets IRS business demands during IRS enhanced readiness activities (e.g., Filing Season and ACA Open Enrollment).
2559813	PSPIS-FR-2010	The Contractor shall ensure IEP service management meets IRS business demands during enhanced IRS readiness activities (e.g., Filing Season and ACA Open Enrollment).
1369985	PSPIS-FR-2100	During enhanced IRS readiness activities, the Contractor shall comply with the more stringent IRS deployment control and approval processes (i.e., Production Environment Control Process).

C.3.2 IEP Infrastructure Services

The objective of the IEP Infrastructure Services is for the vendor to provide the infrastructure necessary to deliver IEP services. Infrastructure includes facilities, hardware, software,

middleware, network connectivity, operating system, compute resources, storage, and peripherals. The requirements in this section are intended to request solutions from the vendor regarding how it will deliver infrastructure services to support existing and future IEP service needs.

C.3.2.1 Foundation

ELM ID	IEP 2.0 Req ID	Contents
1382587	PIS-FR-100	The Contractor shall document the IEP infrastructure, including the physical facilities, system architecture, components, and services necessary to establish this infrastructure; and all IRS applications' workloads hosted in this infrastructure.
1382594	PIS-FR-200	The Contractor shall design the IEP infrastructure to host all current IRS IEP applications' workloads, development workflow, and development dependencies.
1385041	PIS-FR-210	The Contractor shall design the IEP infrastructure to host new IRS applications' workloads and development dependencies.
1382596	PIS-FR-400	The Contractor shall design the IEP infrastructure to enable access to all IRS applications' workloads, which are hosted in this infrastructure, over secure communications network.
1385028	PIS-FR-410	The Contractor shall design the IEP infrastructure to handle changes in demands or requirements of all IRS applications' workloads hosted in this infrastructure.
1382600	PIS-FR-800	The Contractor shall design the IEP infrastructure and the IRS applications' workloads hosted in this infrastructure to allow authorized external users (users from IP addresses outside of IRS enclave) to access these IRS applications.
1385029	PIS-FR-810	The Contractor shall design the IEP infrastructure and the IRS applications' workloads hosted in this infrastructure to allow authorized internal IRS users to access these IRS applications.
1385030	PIS-FR-820	The Contractor shall design the IEP infrastructure to allow authorized IEP applications to interface with systems and application components hosted in IRS Enterprise Computing Centers (ECCs). The workloads of all such IEP applications also shall be designed to enable this interface.
1385031	PIS-FR-830	The Contractor shall design the IEP infrastructure to allow authorized IEP applications to interface with systems and application components hosted in IRS Enterprise Cloud ecosystem. The workloads of all such IEP applications also shall be designed to enable this interface.
1385026	PIS-FR-1310	The Contractor shall design the IEP infrastructure to be able to control service request rates on API Gateways and web traffic to protect them from abuse.
2457775	PIS-FR-1800	The Contractor shall avoid the use of custom solutions in the IEP infrastructure and all IRS applications' workloads hosted in this infrastructure. The Contractor shall obtain the IRS concurrence on the need to use a custom solution.
1364768	PIS-FR-1810	The Contractor shall design and implement all IT infrastructure platforms by utilizing and meeting the accepted industry and Federal government

ELM ID	IEP 2.0 Req ID	Contents
		interoperability requirements, standards, and best practices that minimize the dependence on custom or proprietary solutions.

C.3.2.2   Reliability

ELM ID	IEP 2.0 Req ID	Contents
1383166	PIS-FR-1510	The Contractor shall design the IRS application's workload to scale to meet the workload demands. The term "application workload" is intended to indicate the underlying IEP services and resources allocated to the application necessary to support the application's execution and required performance across all IEP environments and development tool dependencies.
1383190	PIS-FR-1520	The Contractor shall design the IEP infrastructure to meet IRS availability and performance standards for all IRS applications' workloads hosted in IEP infrastructure.
1383198	PIS-FR-1530	The Contractor shall design the IEP infrastructure with sufficient redundancies to support to all hosted applications' production availability requirements up to 24x7.
1383221	PIS-FR-1540	The Contractor shall design the IEP infrastructure with sufficient redundancies to support to all hosted applications' non-production availability requirements up to 24x7.
1383224	PIS-FR-1500	The Contractor shall maintain the IEP infrastructure in compliance with N/N-1 versions/standards allowable within IRS enterprise guidelines, unless exempted by IRS, and patch or replace them in accordance with IRM 2.17.1, Infrastructure Currency, Infrastructure Currency Policy for Software.
1382592	PIS-FR-1400	The Contractor shall support applications owners to ensure that applications will operate in IEP infrastructure refreshes.

C.3.2.3   Operation

ELM ID	IEP 2.0 Req ID	Contents
1385019	PIS-FR-1600	The Contractor shall evolve the IEP infrastructure to support improved operations and cost savings.
1385020	PIS-FR-1610	The Contractor shall design the IEP infrastructure to be capable of integrating with IRS enterprise systems and processes.
1385021	PIS-FR-1620	The Contractor shall design the IEP infrastructure to be capable of being decoupled from IRS enterprise systems and processes.
1385022	PIS-FR-1630	The Contractor shall design the IEP infrastructure to be capable of supporting automated provisioning.

ELM ID	IEP 2.0 Req ID	Contents
1385023	PIS-FR-1640	The Contractor shall schedule joint exercises (e.g., game days) to test the IEP infrastructure; all IRS applications' workloads hosted in this infrastructure; the associated processes, procedures, and alarm solution; and verify that alarm solution recognizes issues correctly.
1385025	PIS-FR-1650	The Contractor shall work with IRS to establish metrics baselines for operational improvement, investigation, and intervention; collect and analyze metrics, and validate and report operations success and how the success changes over time.

C.3.2.4   Performance

ELM ID	IEP 2.0 Req ID	Contents
2457772	PIS-FR-1700	The Contractor shall design the IEP infrastructure to enable provisioning of reliable, scalable, and secure storage to all IEP hosted IRS applications' workloads.
2457774	PIS-FR-1710	The Contractor shall design and provision network solutions to satisfy application requirements.

C.3.2.5   Infrastructure Work Request Support

The objective of Infrastructure Work Request Support is for the contractor to be capable of providing additional services to meet work request requirements, only as directed.

ELM ID	IEP 2.0 Req ID	Contents
2556243	PIS-FR-1720	The Contractor shall provide IEP Infrastructure services necessary to meet specific work request objectives and requirements.

C.3.3   IEP Application Hosting Services

The objective of the IEP Application Hosting Services is for the vendor to provide comprehensive hosting support for applications accessed by external users and organizations. Areas covered by these requirements include IEP environment creation and maintenance, service management (e.g., incident management, service catalog), and monitoring. The requirements in this section are intended to request solutions from the vendor regarding how it will deliver application hosting services to support existing and future IEP service needs.

C.3.3.1   Application Hosting Support

ELM ID	IEP 2.0 Req ID	Contents
1385707	PWHS-FR-100	The IRS is seeking to obtain IEP Application Hosting services. The Contractor shall define and document, in an Application Hosting Concept of Operations (CONOPS), its solution to provide application hosting support for development, testing, integration and production, including provisions for capacity management, incident management, performance monitoring, and infrastructure integration support.

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ELM ID	IEP 2.0 Req ID	Contents
1385709	PWHS-FR-300	The Contractor shall provision application development/testing/production environments according to the current AS-IS IEP specifications and IRS Enterprise standards, to include virtualized servers, containers, API gateways, Low Code Development Platform (LCDP), and security standards (Solicitation Section J, Attachment, *Current State of the IEP Systems and Services)*.
1385710	PWHS-FR-400	The Contractor shall support release management for each application. Normally each application will have multiple releases and each release needs certain types of IEP application hosting environments. The Contractor shall provide lower-level (non-production) environments and production environments, as requested by each application team. IEP environments interfacing with IRS backend environments should align with the Enterprise-defined environment and security requirements. All IEP provisioned environments shall support flexible configuration options needed to support customer requirements.
1369876	PWHS-FR-600	IEP non-production environments shall be capable of being configured for IRS third-party (i.e., contractors other than IEP contractor) application developers' access as needed to support external system integration testing.
1368144	PWHS-FR-700	The Contractor shall ensure all IEP non-production environments are synchronized with the corresponding IEP production environment.
1385713	PWHS-FR-1000	The Contractor shall demonstrate the accuracy, validity, effectiveness and maturity of the backup and restore capability, including, but not limited to, satisfying IRS authorized third party auditing needs with contractor's backup and restore parameters.
1385714	PWHS-FR-1100	The Contractor shall provide IEP Application Hosting Operations and Maintenance services in accordance with industry-leading practices for IT service delivery frameworks. The IT service delivery processes should align with IRS service delivery processes.
1385716	PWHS-FR-1300	The Contractor shall ensure IEP services satisfy availability SLOs, regardless of contractor routine maintenance activities.

C.3.3.2 Capacity Management

ELM ID	IEP 2.0 Req ID	Contents
1385718	PWHS-FR-1400	The Contractor shall provide sufficient capacity to meet IRS business requirements at the applicable service levels (utilization, performance) in accordance with IRM 2.144 Capacity Management.
1385719	PWHS-FR-1500	The Contractor shall develop a Capacity Management Plan that details how its solution will comply with all applicable SLOs. This Capacity Management Plan will address all components necessary for IEP services (e.g.: systems processing, memory, storage, staffing and licensing for IEP).
1385723	PWHS-FR-1510	The Contractor shall have the ability to scale capacity to meet additional IEP service demand while still satisfying applicable SLOs (e.g., timeliness, utilization, performance).

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ELM ID	IEP 2.0 Req ID	Contents
1385724	PWHS-FR-1520	The Contractor shall have the ability to track and report capacity metrics for discrete components of the IEP environment (e.g., application servers, virtual machines).
1385725	PWHS-FR-1600	The Contractor shall develop Capacity Management plans and processes informed by industry best practices for service management (e.g., ITIL).
1385726	PWHS-FR-1700	The Contractor shall plan for future capacity demand changes by collecting inputs and requirements from available sources (e.g., historical demand change data and projections, stakeholder requirements).
1369918	PWHS-FR-2300	The Contractor shall provide a Capacity Management Plan which describes their process for capacity management to ensure that all current and future capacity and performance aspects of the IEP services are provided to meet business requirements.
1369917	PWHS-FR-2400	The Contractor shall provide the capability to access and view capacity information on-demand. The capacity information available should include real-time, historical, and predictive data and enable views by hosted application services.
Pending	PWHS-FR-2410	The Contractor shall provide "right-sizing" recommendations based on IEP applications resource usage and service consumption.
Pending	PWHS-FR-2420	The Contractor shall provide Capacity Optimization reports summarizing IEP services consumptions and recommendations for IEP applications service consumption/recommendations for capacity optimization for both production and non-production environments.
Pending	PWHS-FR-2430	The Contractor shall provide designated IRS personnel access to CSP-native cost, utilization data and optimization reports for all IRS IEP cloud-hosted applications.
1369916	PWHS-FR-2500	The Contractor shall provide the capability to generate reports on-demand. The reports should allow analysis of real-time, historical, and predictive data and enable views by services (e.g., application).

C.3.3.3   Incident Management

ELM ID	IEP 2.0 Req ID	Contents
1369914	PWHS-FR-2700	The Contractor shall establish and operate Incident Management processes that incorporate industry best practices and align with IRS policies in accordance with IRM 2.148.2, Incident Management Process and Solicitation Section J, Attachment, *ITOCC Incident Management Section SOP*.
1369922	PWHS-FR-3200	The Contractor shall develop an IEP Incident Management Standard Operating Procedure (SOP) prior to the IEP operational phase. The Contractor shall maintain and follow this SOP throughout the contract period of performance.
1385734	PWHS-FR-3210	The Contractor shall prioritize incidents in accordance with the IRS EOps Incident Management SOP priority criteria (Solicitation Section J, Attachment, *ITOCC Incident Management Section SOP*).

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ELM ID	IEP 2.0 Req ID	Contents
1369919	PWHS-FR-2900	The Contractor shall comply with Incident Management SLOs (Solicitation Section J, Attachment, *QASP Performance Standards)*.
1385736	PWHS-FR-2910	The Contractor shall manage all incidents related to contractor-managed IEP services. For all incidents that impact IRS, the Contractor shall service them and notify IRS in accordance with IRS Incident Management process and incident prioritization designation (Solicitation Section J, Attachment, *ITOCC Incident Management Section SOP*).
1369920	PWHS-FR-3000	The Contractor shall participate in the IRS Incident Management process, including ticket creation, triage, assignment, resolution, and closure.
1385738	PWHS-FR-3010	The Contractor shall provide the capability for the IRS to generate reports and view incident status on-demand.
1385739	PWHS-FR-3020	The Contractor shall use the IRS ticketing system to support IEP Incident Management processes and track progress towards resolution.
1385740	PWHS-FR-3030	The Contractor shall comply with the IRS EOps Incident Management SOP regarding entry and tracking of incidents in the IRS system (Solicitation Section J, Attachment, *ITOCC Incident Management Section SOP*).
1369923	PWHS-FR-3300	The Contractor shall provide the capability for the IRS to view and verify compliance with incident management SLOs on demand.

C.3.3.4   Problem Management

ELM ID	IEP 2.0 Req ID	Contents
1269453	PWHS-FR-3310	The Contractor shall develop an IEP Problem Management Standard Operating Procedure (SOP) prior to the IEP operational phase. The Contractor shall maintain and follow this SOP throughout the contract period of performance.
1369911	PWHS-FR-3320	The Contractor's Problem Management process shall comply with the IRS EOps Problem Management SOP (Solicitation Section J, Attachment, *EOps Problem Management Process SOP*).
1369912	PWHS-FR-3330	The Contractor shall use the IRS ticketing system to record problems and track progress towards resolution.

C.3.3.5   Monitoring

ELM ID	IEP 2.0 Req ID	Contents
1269452	PWHS-FR-3400	The Contractor shall provide monitoring services to enable the successful delivery of IEP services
1272856	PWHS-FR-3600	The Contractor shall document its monitoring processes in a Monitoring and Management Plan. This plan should demonstrate how the Contractor's processes, tools, and staffing enable the IRS to have an integrated, timely view into the health of IEP services.

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ELM ID	IEP 2.0 Req ID	Contents
1272857	PWHS-FR-3700	The Contractor shall provide end-to-end monitoring of IEP services. The term "end-to-end" is intended to include the monitoring of IEP services integration with IRS interfaces.
2461811	PWHS-FR-3710	The Contractor shall provide monitoring data in a format that can be used by IRS systems and processes.
1272858	PWHS-FR-3800	The Contractor shall provide IRS users the capability to view monitoring data on demand.
1272865	PWHS-FR-4100	The Contractor shall be capable of supporting the existing IEP applications' built-in monitoring capabilities or equivalent monitoring capabilities available using the IEP monitoring tools.
1272864	PWHS-FR-4200	The Contractor shall provide periodic monitoring reports regarding the health and status of IEP services.
1272900	PWHS-FR-3520	The Contractor shall provide the capability for IRS users to access monitoring data and reports on demand.
1272862	PWHS-FR-4400	The Contractor shall provide the capability to collect, store, archive, and retrieve log files and monitoring event data.
1272861	PWHS-FR-4500	The Contractor shall support IRS-authorized audits, including information requests from third parties.
1272901	PWHS-FR-3530	The Contractor shall comply with IRS data storage and retention policies in accordance with IRM 1.15, Records and Information Management.
1272902	PWHS-FR-3540	The Contractor shall identify and resolve system problems using Application Discovery, Tracing and Diagnostic (ADTD) capabilities.
1272903	PWHS-FR-3550	The Contractor shall use Artificial Intelligence for IT Operations (AIOps) capabilities to automate routine manual processes while continuously improving the ability to autonomously identify and determine root causes.
1272904	PWHS-FR-3560	The Contractor shall provide the capability to use Container Monitoring and Control to monitor and collect metrics to ensure applications running in containers are performing properly.
1272905	PWHS-FR-3570	The Contractor shall provide the capability to use Microservice Monitoring and Logging Control to prevent, predict, and detect microservice anomalies and issues.
1272906	PWHS-FR-3580	The Contractor shall monitor and control the end-user interaction experience with the system/application using digital experience monitoring and control capabilities.
2461835	PWHS-FR-3590	The Contractor shall provide monitoring and control reporting, dashboards, alerts capable of providing summary/detailed information, configured to run per schedule/ad-hoc using context-drive data.

C.3.3.6   Application Infrastructure Integration Services (AIIS)

ELM ID	IEP 2.0 Req ID	Contents
1369924	PWHS-FR-4600	The Contractor shall provide Application Infrastructure Integration Services (AIIS) to ensure applications are correctly configured in the IEP hosting environments. The Contractor is responsible for receiving application packages from IRS application teams and providing integration with IEP environments throughout application integration, testing and production deployment phases in compliance with the Contractor's change management and deployment processes.
1369862	PWHS-FR-4700	The Contractor shall provide AIIS support, to include: a. Application deployment b. Analysis of IT infrastructure requirements from applications c. Configuration and troubleshooting support d. Shared Services support.
1369863	PWHS-FR-4800	The Contractor shall provide AIIS support to application owners throughout application life-cycle. The Contractor shall provide AIIS support to all IEP-hosted applications, including new ones not included in the original IEP application baseline.
1369864	PWHS-FR-4900	The Contractor shall provide knowledge transfer support for application technical reviews.
1369866	PWHS-FR-5000	The Contractor shall integrate AIIS with other contractor-provided IEP services, including Release Management, Performance Monitoring, Incident Management, and Problem Management.
1369867	PWHS-FR-5100	The Contractor shall troubleshoot and debug AIIS issues associated with IEP services, Shared Service components, and any third-party service providers.
1369868	PWHS-FR-5200	The Contractor shall help application owners to identify the integration points that could be causing an issue with application operations. The Contractor shall coordinate ticket resolution in accordance with the incident management process.
1369875	PWHS-FR-5900	The Contractor shall support multiple, concurrent, release work streams for each IEP-hosted application. The IRS expects this capability to support automated, industry-standard application release practices for IEP-hosted applications.
2497088	PWHS-FR-5910	The Contractor shall support the ability to deploy application changes using modern deployment methods to maximize high application availability (e.g., blue-green and canary deployments).
1369877	PWHS-FR-6000	The Contractor shall support application deployment into the IEP environments, including containers, and assist the application owners troubleshooting applications before, during, and after application deployment.
1369879	PWHS-FR-6200	The Contractor shall support application owners test activities in accordance with IRM 10.8.60 IRM IT Service Continuity Management (ITSCM) Policy and Guidance. Test activities support includes all testing requirements e.g., functional, integration, Alternate Processing Site (APS) testing, load testing, ad hoc testing and performance testing.

ELM ID	IEP 2.0 Req ID	Contents
1369880	PWHS-FR-6300	The Contractor shall provide a fully integrated, turn-key solution for application deployment and integration. The Contractor shall operate and integrate all solutions proposed and implemented by the Contractor.
1369881	PWHS-FR-6400	The Contractor shall develop and maintain a Guide for Application Developers. The guide will provide guidance, processes and procedures for application developers to rapidly deploy, test, and integrate existing and new applications to the IEP environments without degrading IEP service performance. The Contractor shall enforce application deployment compliance with this guide.
1369882	PWHS-FR-6500	The Contractor shall provide engineering services to support investigation of IRS IT strategies for taxpayer services. These services shall support initiative research, analysis, and engineering exploration, e.g.: IRS research/analysis/engineering, problems diagnoses, solution/investigation alternatives proposals.
1385807	PWHS-FR-6510	The Contractor shall be capable of supporting cloud migration and modernization of IEP-hosted applications.
Pending	PWHS-FR-6520	The Contractor shall provide a standardized application performance tuning service to support application owner performance testing across multiple domains and N-tier applications. With this service, the Contractor shall build a standardized performance tuning environment that provides testing harness scaffolding, and testing tools.
Pending	PWHS-FR-6530	The Contractor shall provide a standardized performance tuning service to support application performance tuning by: • Providing guidance around potential application performance issues • Assisting with troubleshooting application performance issues • Monitoring performance testing and providing necessary data • Recommending alternative IEP configurations to improve performance results.

C.3.3.7   Configuration and Change Management

ELM ID	IEP 2.0 Req ID	Contents
1368140	PWHS-FR-6600	The Contractor shall publish a Configuration and Change Management Plan, based on industry-standard service management practices. The Change Management processes will comply with the IRS Change Management processes in accordance with IRM 2.150.2 Configuration and Change Management, Configuration Management.
1368141	PWHS-FR-6700	Specifically, the Contractor shall track configuration items that impact IEP hosted application configurations, service configuration attributes, and hosting environment attributes.
1369713	PWHS-FR-6710	The Contractor shall periodically report configuration details for all applications hosted in IEP provisioned environments to include hosting environment attributes and active/inactive usage status.

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ELM ID	IEP 2.0 Req ID	Contents
1368143	PWHS-FR-6900	The Contractor shall integrate the IEP Configuration Management processes and comply with the IRS Configuration Management process in accordance with IRM 2.150.2 Configuration and Change Management, Configuration Management.
1368146	PWHS-FR-7100	The Contractor shall minimize the impact of change-related incidents upon service quality.
1368149	PWHS-FR-7400	The Contractor shall publish a Change Management Standard Operation Procedure (SOP) that includes: the change management process itself, the change management system, roles and responsibilities of the stakeholders, and the integration points with the IRS Change Management process.
1368152	PWHS-FR-7700	The Contractor shall publish a Deployment Management Standard Operating Procedure (SOP) that describes the processes and procedures to coordinate application deployments. The Deployment processes should include re-deployment of the previous application version, if required, subject to the same deployment SLO performance level.
1368153	PWHS-FR-7800	The Contractor shall implement an automated deployment system to provide the processes and tools to deliver and support automated deployments that comply with IRS application deployment standards, including the IRS CI/CD process. Automated deployments shall support the current IEP Control Document (IEP-CD) interface and shall include automated deployment status notifications to application stakeholders.
1368154	PWHS-FR-7900	The Contractor shall manage all deployments to all environments. The Contractor shall support customer requests to use their own deployment process for non-production environments and include this option as one of the standard offerings in the Service Catalog.
1368158	PWHS-FR-8200	The Contractor shall provide application owners with a repeatable deployment process to include: a. Assistance creating deployment packages b. Resource and tools for pre-deployment, including validating deployment packages.
1369686	PWHS-FR-8210	The Contractor shall provide an IEP Enterprise Integration Test Environment (EITE) that matches the production environment for all applications and supports multiple application releases at the same time on demand. The production environment includes all IEP layers such as CDN, database, cache, etc.
1368159	PWHS-FR-8300	After IEP service changes or application deployments, the Contractor shall provide confidence testing for each application and resolve all the deployment issues. Confidence testing will include: i. Validation that the main application Uniform Resource Locator (URLs) are accessible ii. Validation, using test accounts, that basic login functionality is operational iii. Review of deployment related logs to ensure there are no anomalies iv. Connectivity validation v. Test cases with GFE and non-GFE client computers

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ELM ID	IEP 2.0 Req ID	Contents
1368160	PWHS-FR-8400	The Contractor shall maintain maintenance and patch management licenses for all Contractor-managed components within the IEP environments, including: services, hardware, software, and networking.
1368161	PWHS-FR-8500	The Contractor shall establish a patch management process and plan in accordance with IRS guidelines
1368162	PWHS-FR-8600	The Contractor shall automate the patch management process for IEP.

C.3.3.8   Service Catalog

ELM ID	IEP 2.0 Req ID	Contents
1369728	PWHS-FR-8800	The Contractor shall provide a Service Catalog that includes a listing of standard services available to IEP customers. The Contractor shall manage the Service Catalog in accordance with industry-leading practices and in accordance with IRM 2.142.1, Service Catalog Management Directive.
1369735	PWHS-FR-8810	The Contractor proposed set of standardized service offerings shall include: 1. Infrastructure-as-a-Service (IaaS) provisioning and management 2. Platform-as-a-Service (PaaS) provisioning and management 3. Software-as-a-Service (SaaS) for Managed Service Provider (MSP) managed application engineering and operations 4. Application Infrastructure Integration Services 5. Deploy Application Service 6. Application Performance-Tuning Services 7. IEP Reports and Data Analytics information in response to ad hoc service requests 8. Ad hoc Reports 9. Non-standard Service Request 10. IRS/IEP approved CSP services (e.g., AWS, Azure, Google)
1369736	PWHS-FR-8820	The service catalog function shall include an automated, streamlined process to capture customer requirements for standard IEP services. Additionally, the service catalog capability should support service cost estimates, service tailoring and approval for non-standard service requests.
1369738	PWHS-FR-8840	The Contractor shall train all IEP stakeholders on the IEP Service Catalog. The training should be tailored to stakeholder role (e.g., IEP Program staff, IEP Customers). Remote training sessions shall accommodate at least a minimum of 50 attendees per session. Training frequency for initial service catalog training should provide at least two sessions per month prior to transition to IEP 2.0 service catalog operations. After the initial formal training, additional training sessions can be requested as needed by IEP service catalog user groups.

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ELM ID	IEP 2.0 Req ID	Contents
1369745	PWHS-FR-8900	The Contractor shall establish an IEP On-Boarding process to manage requests for new IEP-hosted applications. The On-Boarding process shall include: 1. Integration with the Service Catalog request process 2. Capability of accommodating both standard and non-standard services 3. Establishment and maintenance of updated listing of applications as well as associated owners and distribution lists
1369925	PWHS-FR-9100	The Contractor shall integrate the On-Boarding process with the IEP Technical Review Board (TRB) process (Solicitation Section J, Attachment, *EOps TRB SOP*).
1369742	PWHS-FR-9200	The Contractor shall publish an IEP On-Boarding Standard Operational Procedure (SOP).
1369741	PWHS-FR-9300	The Contractor shall propose On-Boarding metrics appropriate to assess on-boarding effectiveness and process improvement. The metrics should prioritize measures which emphasize on-boarding speed, service standardization, and price-estimating accuracy.

C.3.3.9   Service Desk

ELM ID	IEP 2.0 Req ID	Contents
1369723	PWHS-FR-9500	The Contractor shall provide an IEP Service Desk function, in accordance with industry-standard service management practices. The IEP Service Desk shall be the central point of contact for IEP service users/customers.
1369724	PWHS-FR-9600	The Contractor shall provide Service Desk services for 24x7 support to IEP customers for all IEP services and environments. The Service Desk shall manage all incidents and operational requests for all IEP production and non-production environments. The Service Desk shall provide answers to IEP services related questions.
1369725	PWHS-FR-9700	The IEP Service Desk operations shall interface with IRS Enterprise Operations processes to operate IEP services and ensure service restoration within agreed SLOs .
1369726	PWHS-FR-9800	The Contractor shall publish and maintain a Service Desk Standard Operational Procedure (SOP) that details how these services will be delivered to meet SLOs.

C.3.3.10   Hosting Work Request Support

The objective of Hosting Work Request Support is for the contractor to be capable of providing additional services to meet work request requirements.

ELM ID	IEP 2.0 Req ID	Contents
2556331	PWHS-FR-9810	The Contractor shall provide IEP Application Hosting services necessary to meet specific work request objectives and requirements.

C.3.4 IEP Security Services

The objective of the IEP Security Services is for the vendor to minimize risk to the IRS by effectively securing IEP environments, applications, and services. Services in this area include delivering IEP Active/Edge Cyber defense, security compliance, and Authority to Operate (ATO) maintenance. The requirements in this section are intended to request solutions from the vendor regarding how it will secure IEP environments and minimize risk to IRS data, applications, services, and users.

C.3.4.1   Security Risk Management Framework

ELM ID	IEP 2.0 Req ID	Contents
1386232	PSS-FR-300	The Contractor shall implement an integrated risk management process for IEP services and environments that complies with NIST SP 800-37 Rev. 2 or latest version (Guide for Applying the Risk Management Framework to Federal Information Systems: A Security Life Cycle Approach).
1386149	PSS-FR-400	The Contractor shall manage security risks and keep real time knowledge of the managing environment to minimize potential impact to IRS systems and data and maintaining information systems authorization in accordance with OMB Circular A-130, Managing Information as a Strategic Resource.
1387431	PSS-FR-410	The Contractor shall perform security tasks in accordance with the most current versions of applicable security guidelines, regulations, and publications.
1386135	PSS-FR-500	The Contractor shall review and analyze information on new or emerging threats as evidenced by threat activities present in monitoring results, threat modeling, and other trusted sources.
1387432	PSS-FR-510	The Contractor shall implement expedited procedures to mitigate identified threats.
1387433	PSS-FR-520	The Contractor shall prepare a monthly Executive Summary of Analytical Results and Recommendations.
1386194	PSS-FR-700	The Contractor shall correlate security data produced by tools and processes across the environment to detect and respond to security risks.
1387434	PSS-FR-710	The Contractor shall demonstrate an automated risk management decision approach supported by continuous monitoring and sharing of agency cybersecurity status and threats that improves security situational awareness, defense and response. (Refer to Office of Management and Budget (OMB) Memo (M) 14-03, Enhancing the Security of Federal Information and Information Systems; OMB M 15-01, Fiscal Year 2014-2015 Guidance on Improving Federal Information Security and Privacy Management Practices, and NIST SP 800-137, Information Security Continuous Monitoring (ISCM) for Federal Information Systems and Organizations).
1386187	PSS-FR-800	The Contractor shall prepare an IEP Security Concept of Operations (Security CONOPS) document describing how the Contractor supports security operations. The document shall provide an end-to-end view with use case scenarios for key security functionality and tools used, in accordance with NIST SP 800-53 Rev 5 PL-7. The initial draft of the Security CONOPS shall be included with Contractor's Request for Proposal (RFP) Response package.

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ELM ID	IEP 2.0 Req ID	Contents
1386218	PSS-FR-900	The Contractor shall provide IRS and IRS-designated contractors with IEP access for periodic vulnerability scanning, penetration testing and independent validation and verification of security controls, including access to applications in that are going through development and testing in the IEP lower environments.
1386736	PSS-FR-910	The Contractor shall provide IRS remote access and onsite access at the Contractor's facilities. (Reference IRS Publication 4812)
1386210	PSS-FR-1000	The Contractor shall prepare an IEP Information Security Status Package that communicates the security posture of the IEP environment and a statement of validation that services were provided as defined in associated plans and activities. a. The Vulnerability Assessment and Configuration (Analysis) Summary contain the status of vulnerabilities and Contractor's effort to remediate them through patches or secure configurations. This report will also provide information regarding policy settings in cloud services used to provide IEP services b. The Security Incident Summary Report contains the detailed investigation documentation for all potential/suspected incidents detected and investigated by the Contractor's security operations team. This includes the details of the analysis performed to close escalated Security Information and Event Management (SIEM) tickets. c. The Mitigation Report Summary contains the details of open and closed security, configuration and cloud policy settings findings and mitigations taken to close them. d. The Configuration Compliance Summary Report contains the DISA STIG compliance summary and details for all the servers and devices in the IEP environment. Configuration weaknesses shall be tracked in the Mitigation Report and mitigated.
1386091	PSS-FR-1500	The Contractor shall be responsible for all aspects of Security Risk Assessments (SRAs) to include Security Control Assessment (SCA), Annual Security Control Assessment (ASCA), Event Driven-Security Control Assessment ED-SCA and all other levels of assessments. (Refer to IRS Publication 4812, Contractor Security Controls, IRM 10.8.1, IT Security Policy and Guidance, NIST SP 800-53 Rev. 5, Security and Privacy Controls for Federal Information Systems and Organizations, NIST SP 800-39, Managing Information Security Risk Organization, Mission, and Information System View, FIPS Publication (PUB) 200, Minimum Security Requirements for Federal Information and Information Systems, and IRS Cloud Cybersecurity Authorization Playbook).
1387435	PSS-FR-1510	The Contractor will create and maintain all documents necessary to ensure successful acquisition of Authority to Operate (ATO). Deliverables include but are not limited to: a. SSP b. ISA c. CONMON PLAN d. ISCP e. SAR Mitigation plans f. Other documents required by the IRS
Pending	PSS-FR-1520	The Contractor shall ensure any software used for IEP services comply with OMB M-22-18, Enhancing the Security of the Software Supply Chain through Secure Software Development Practices.

ELM ID	IEP 2.0 Req ID	Contents
Pending	PSS-FR-1530	The Contractor shall assist the IRS in confirming OEM or software vendor self-attestation statements applicable for products used in IEP services are available in accordance with OMB M-22-18.

C.3.4.2   Patch and Vulnerability Management

ELM ID	IEP 2.0 Req ID	Contents
1386196	PSS-FR-1700	The Contractor shall deliver an IEP Security Patch and Vulnerability Management Plan that details security patch and vulnerability management processes, including automated response and remediation, for all IEP environments, system components, tools and applications components. Applicable references include: IRS IRM 10.8.50 (Information Security, Service-wide Security Patch Management and NIST SP 800-40 (Enterprise Patch Management Technologies).
1386230	PSS-FR-1800	The Contractor shall establish bi-directional communications with IRS Computer Security Incident Response Center (CSIRC) for notification, receipt and acknowledgements regarding security patches and vulnerability management communications.
1386200	PSS-FR-2000	The Contractor shall perform external vulnerability scanning in accordance with current and future revisions of NIST SP 800-53 (Security and Privacy Controls for Federal Information Systems and Organizations).
1386203	PSS-FR-2100	The Contractor shall implement a centralized Patch Management System that addresses impending threats to the IEP and related critical IT infrastructure.
1387436	PSS-FR-2110	The Contractor shall provide authorized IRS users with on-demand access to vulnerability and configuration status.

C.3.4.2.1   Vulnerability Management

ELM ID	IEP 2.0 Req ID	Contents
1387437	PSS-FR-2120	The Contractor shall ensure scan data is collected from all IEP assets. Vulnerability information collected shall show vulnerabilities accessible by authenticated and non-authenticated users on the system.
1387438	PSS-FR-2130	The Contractor shall securely provide the vulnerability scan data to a contractor-provided, IRS-approved analytics tool or service for analysis.
1387439	PSS-FR-2140	The Contractor shall perform data collection via: passive network scanners, external/physical/virtual/cloud remote scanners, container sensors, cloud connectors, and agents providing coverage of internal and external networks.
1387440	PSS-FR-2150	The Contractor shall provide training to designated IRS employees on MSP tools being used to scan all systems. The training shall support the objective for IRS employees to independently confirm security scan results.
1387441	PSS-FR-2160	The Contractor shall provide authorized IRS employees (or authorized contractors) with access to scanning tools to enable independent verification and validation (IV&V).

C.3.4.2.2   Patch Management

ELM ID	IEP 2.0 Req ID	Contents
1387443	PSS-FR-2170	The Contractor shall issue/apply patches to all environments using automated processes.

ELM ID	IEP 2.0 Req ID	Contents
1387444	PSS-FR-2180	The Contractor shall provide the capability to sort and filter patching data using metadata and user labels.
1387445	PSS-FR-2190	The Contractor shall provide the capability to separate and assign patch management tasks to groups that responsible for specific tasks.
1387446	PSS-FR-2220	The Contractor shall schedule patch jobs for low usage/maintenance windows in accordance with IRM 10.8.1, IT Security Policy and Guidance.

C.3.4.2.3 Cloud Security Management

ELM ID	IEP 2.0 Req ID	Contents
1387447	PSS-FR-2210	The Contractor shall utilize a Cloud Access Security Broker (CASB) in order to verify security compliance of all IEP cloud services and shall utilize Cloud Security Posture Management (CSPM) to supplement the enforcement capabilities of the CASB.

C.3.4.2.4 Reporting and Visibility

ELM ID	IEP 2.0 Req ID	Contents
1387448	PSS-FR-2230	The Contractor shall establish a daily 'Dashboard' that includes: 1. Date identified by the Tech Vendor (Microsoft, RHEL, Apache, etc.). 2. Patch Availability Date. 3. Original date identified in the IEP originally as well as patched (if applicable). 4. Current Date identified in the IEP currently. 5. Date "To Be" Patched/Configured. 6. Mitigation Plan (Plan of Action and Milestones (POA&M), Risk-Based Decision (RBD), Mitigate). 7. Technology Affected. 8. Number of systems/servers. 9. Comments
1387449	PSS-FR-2240	The Contractor shall provide a dashboard that provides historical data, including: 1. Common Vulnerability and Exposure (CVE) number and/or description 2. Severity 3. Date Opened 4. Date Closed 5. Number of days opened 6. Closure action (Mitigated, POA&M, RBD#)
1387450	PSS-FR-2250	The Contractor shall provide authorized IRS users (including authorized contractors) with access to status and reporting dashboards.

C.3.4.3 Plan of Action and Milestones (POA&M)

ELM ID	IEP 2.0 Req ID	Contents
1386131	PSS-FR-2200	The Contractor shall maintain a Plan of Action and Milestones (POA&M) that describes planned actions to correct each vulnerability and configuration management non-compliance with security controls and other non-compliant items. (Refer to IRS Publication 4812, Contractor Security Controls, and, IRM 10.8.1, IT Security Policy and Guidance).

ELM ID	IEP 2.0 Req ID	Contents
1386115	PSS-FR-2300	The Contractor shall provide POA&M status updates in the IRS-designated system(s) in accordance with the IRS POA&M SOP.
1386208	PSS-FR-2400	The Contractor shall obtain IRS approval to establish or change a planned POA&M milestones and completion dates.
1386737	PSS-FR-2410	The Contractor shall obtain IRS approval to change a POA&M status.
1386199	PSS-FR-2500	The Contractor shall submit testing evidence to demonstrate remediation of each POA&M.
1386228	PSS-FR-2600	The Contractor shall test the POA&Ms closed in the previous reporting period to ensure the mitigation action has produced the desired outcomes.

C.3.4.4 Security Continuous Monitoring

C.3.4.4.1 Continuous Monitoring

ELM ID	IEP 2.0 Req ID	Contents
1386186	PSS-FR-2700	The Contractor shall provide continuous security monitoring services and internal user behavior analytics across all IEP services and environments (Refer to IRS Publication 4812, Contractor Security Controls, IRM 10.8.1, IT Security Policy and Guidance, and NIST 800-171 (Protecting Controlled Unclassified Information in Nonfederal Systems and Organizations)).
1386180	PSS-FR-2800	The Contractor shall continuously respond to security events and contain risks.
1386118	PSS-FR-3000	The Contractor shall deliver an IEP Continuous Monitoring Plan that details its monitoring processes and maps compliance to NIST guidance. NIST SP 800-53 Rev. 5 (Security and Privacy Controls for Federal Information Systems and Organizations) and NIST 800-171 (Protecting Controlled Unclassified Information in Nonfederal Systems and Organizations).
1387451	PSS-FR-3100	The Contractor shall provide monitoring services to detect, prevent, and mitigate security threats, events and incidents, including unauthorized access to encryption keys, in all IEP environments.
1386141	PSS-FR-3110	The Contractor shall provide monitoring services that are capable of exchanging status and interfacing with IRS Computer Security Incident Response Center (CSIRC) processes and systems.
1386183	PSS-FR-3200	The Contractor shall monitor outbound connections and activities to identify and contain potential exfiltration of sensitive data.
1386222	PSS-FR-3500	The Contractor shall assess IEP services and environments for compliance in accordance with IRS Publication 4812 (Contractor Security Controls), IRM 10.8.1 (IT Security Policy and Guidance), NIST SP 800-137 (Information Security Continuous Monitoring for Federal Information Systems and Organizations), and NIST 800-171 (Protecting Controlled Unclassified Information in Nonfederal Systems and Organizations).
1386226	PSS-FR-3700	The Contractor shall provide services that are compliant with the US Department of Homeland Security (DHS) Cybersecurity & Infrastructure Security Agency (CISA) Continuous Diagnostics and Mitigation (CDM) program.
1387452	PSS-FR-3710	The Contractor shall ensure that the outputs of CDM services are approved by IRS Cybersecurity and AO.

ELM ID	IEP 2.0 Req ID	Contents
1386161	PSS-FR-3800	The Contractor shall provide reports that support FISMA requirements (Refer to NIST SP 800-14, Generally Accepted Principles and Practices for Securing Information Technology Systems) including but not limited to: inventory, inventory change log, security configuration compliance reports, personal security, and POA&Ms.
1386107	PSS-FR-3900	The Contractor shall provide IRS stakeholders the capability to access security-related monitoring data on demand.
1386201	PSS-FR-4000	The Contractor shall establish a point of contact for IRS CSIRC and Cybersecurity Subject Matter Experts (SMEs) for in-depth analytical capabilities and potential incident escalation.
1386173	PSS-FR-4400	The Contractor shall support investigations conducted by the Government agencies, auditing organizations, or law enforcement.
1386739	PSS-FR-4410	The Contractor shall provide log data and report the results of forensics activities.

C.3.4.4.2   Asset Management

ELM ID	IEP 2.0 Req ID	Contents
1387453	PSS-FR-4420	The Contractor will scan for new assets in all environments to include private and Gov Clouds, other Cloud Service Providers (CSPs) and containers.
1387454	PSS-FR-4430	The Contractor shall perform automatic classification, metadata generation and labeling of assets.
1387455	PSS-FR-4440	The Contractor shall provide the capability to search and report on assets using metadata and/or user generated labels.
1387456	PSS-FR-4450	The Contractor shall perform inventory and lifecycle management of security certificates, such as SSL/TLS, and SSO.

C.3.4.5   Security Configuration and Change Management

ELM ID	IEP 2.0 Req ID	Contents
1386089	PSS-FR-4600	The Contractor shall maintain an IEP Security Configuration and Change Management Plan that details security change and configuration management processes that are in accordance with NIST SP 800-14 (Generally Accepted Principles and Practices for Securing Information Technology Systems), NIST SP 800-128 (Guide for Security-Focused Configuration Management of Information Systems), and NIST United States Government Configuration Baseline (USGCB)
1386162	PSS-FR-4700	The Contractor shall ensure that all standard installation, operation, maintenance, update, and patching of systems and software shall not alter the IRS-approved security configuration baselines. Reference IRM Section 10.8.
1386185	PSS-FR-4800	The Contractor shall be capable of tracking and reporting on the security configuration baseline and changes.
1386145	PSS-FR-5000	The Contractor shall ensure that all IEP components have the appropriate security controls in accordance with the IEP SSP and the most current version of NIST SP 800-37 (Guide for Applying Risk Management Framework to Federal Information Systems: A Security Life Cycle Approach).

ELM ID	IEP 2.0 Req ID	Contents
1386155	PSS-FR-5200	The Contractor shall apply the Security Impact Assessment (SIA) process for any change request that alters baseline configurations or modifies the IEP IT infrastructure.
1386741	PSS-FR-5210	The Contractor shall develop a Security Impact Assessment (SIA) process that complies with current and future revisions of NIST SP 800-30 (Guide for Conducting Risk Assessments). This process shall be documented in the Security Configuration and Change Management Plan.
1386175	PSS-FR-5300	The Contractor shall validate adherence to configuration guidelines utilizing contractor-provided tools.

C.3.4.6   Security Audit

ELM ID	IEP 2.0 Req ID	Contents
1386216	PSS-FR-5400	The Contractor shall maintain audit services for the IEP infrastructure and applications.
1387457	PSS-FR-5410	The Contractor shall maintain audit and event logs in accordance with the most current versions of the applicable guidelines (Refer to IRS Publication 4812, Contractor Security Controls, NIST SP 800-18 Rev. 1, Guide for Developing Security Plans for Federal Information Systems, IRM 10.8.1, Information Technology Security, 10.8.24, Cloud Computing Security Policy, NIST SP 800-12, An Introduction to Information Security, and NIST SP 800-92, Guide to Computer Security Log Management).
1386106	PSS-FR-5800	The Contractor shall provide the IRS the capability to access system log information and reports on demand.
1386098	PSS-FR-5900	The Contractor shall provide the capability to automatically transfer or deliver logs to authorized stakeholders and systems, as required.
Pending	PSS-FR-5910	The Contractor shall operate and maintain the event logging at Event Logging Tier 3 (EL.3) of Maturity Model for Event Log Management as established by OMB M-21-31.

C.3.4.7   Incident Handling

ELM ID	IEP 2.0 Req ID	Contents
1386219	PSS-FR-6100	The Contractor shall maintain an IRS-approved Security Incident Handling, Monitoring, and Response Plan that complies with IRS Publication 4812 (Contractor Security Controls) and IRS 10.8.1 (IT Security Policy and Guidance). The Plan should document incident reporting processes, a compliance matrix, and monitor failure reporting
1386096	PSS-FR-6200	The Contractor shall establish bi-directional communications with IRS Computer Security Incident Response Center (CSIRC) to support incident handling, monitoring, and responses.

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ELM ID	IEP 2.0 Req ID	Contents
1386121	PSS-FR-6300	The Contractor shall test the IEP Security Incident Handling, Monitoring and Response Plan at least once each quarter and provide a copy of the Incident Response Test Report to the IRS to include the IEP Risk Management organization, Authorizing Official (AO) office, CSIRC and other key stakeholders. The simulated incidents should test the security controls implemented to mitigate attacks from the specific threat actors in the Contractor's threat model. Testing shall demonstrate the vendors ability to maintain CIA (Confidentiality, Integrity and Availability) of the IEP. Testing shall be conducted in accordance with NIST SP 800-115 (Technical Guide to Information Security Testing and Assessment).
1386116	PSS-FR-6400	The Contractor shall provide support for security incident response on Web hosted applications. This support shall include: a. Providing log data b. Performing actions necessary to limit the impact of the security incident to other system components and applications. c. Recommend solutions to mitigate current and future risks to applications supported by the IEP
1387458	PSS-FR-6410	The Contractor shall develop and implement a process to immediately detect and mitigate cyber attacks and exploits.
1387459	PSS-FR-6420	The Contractor shall support development of an MOU between EOps and Cyber regarding protection of IRS applications and data.

C.3.4.8   Business Continuity

ELM ID	IEP 2.0 Req ID	Contents
1386136	PSS-FR-6500	The Contractor shall maintain an IEP Information System Contingency Plan (ISCP) in accordance with IRS Publication 4812 (Contractor Security Controls), IRM 10.8.1 (IT Security Policy and Guidance), and NIST SP 800-34 Rev .1 (Contingency Planning Guide for Federal Information Systems). The ISCP documents essential services, recovery objectives, roles and responsibilities, and system maintenance and restoration procedures in the event that the managed services experience a disruption, compromise, or failure.
1386169	PSS-FR-6800	The Contractor shall implement an Alternate Site Processing Environment (ASPE) for disaster recovery services in accordance with FIPS Pub 199 (Standards for Security Categorization of Federal Information and Information Systems) at a moderate level. The ASPE shall include all portal components and controls which comprise the IEP security and privacy boundary.
1386231	PSS-FR-6900	The Contractor shall maintain an IRS-approved IEP Alternate Site Processing Environment (ASPE) Plan with specific process, procedures, and personnel required to reconstitute all critical security services and management support for the continued operation and protection of contracted IT infrastructure and web hosted applications.
1386132	PSS-FR-7000	The Contractor shall participate in annual, IRS-coordinated Information Security Contingency Plan (ISCP) Table Top Exercises (TTE) (Refer to Information System Contingency Plan (ISCP) Table Top Exercise and IRM 10.8.62 Information System Contingency Plan (ISCP) and Disaster Recovery (DR) Test, Training, and Exercise (TT&E) Process).

ELM ID	IEP 2.0 Req ID	Contents
1386158	PSS-FR-7100	The Contractor shall support ISCP and ASPE testing. This testing shall include security incident management, system resiliency and cyber attack.

C.3.4.9 Security Control Assessment (SCA) and Contractor Security Assessment (CSA)

ELM ID	IEP 2.0 Req ID	Contents
1386154	PSS-FR-7200	The Contractor shall maintain an IEP Security Control Assessment (SCA) Test Plan that complies with IRM 10.8.1 (IT Security Policy and Guidance), NIST SP 800-37 Rev. 2 (Guide for Applying the Risk Management Framework to Federal Information Systems: A Security Life Cycle Approach), and NIST SP 800-53A Rev.5 (Assessing Security and Privacy Controls in Federal Information Systems and Organizations: Building Effective Assessment Plans). The initial draft of the SCA Test Plan shall be included with the Contractor's Request for Proposal (RFP) Response package.
1386229	PSS-FR-8200	The IEP SCA Test Plan shall be updated annually as part of the Annual SCA.
1386168	PSS-FR-8300	The Contractor shall support the IRS SCA and Annual SCA processes. This support includes: i. pre-SCA activities ii. coordinating for resources to support SCA plan development iii. test case execution.
1386147	PSS-FR-8500	The Contractor shall maintain an IEP Security Assessment Report (SAR) Mitigation Plan, including POA&Ms for findings identified in the IRS Cybersecurity provided SAR.
1386146	PSS-FR-8600	The Contractor shall maintain an IEP Contractor Security Assessments (CSA) Test Plan that complies with IRS Publication 4812 (Contractor Security Controls).
1386111	PSS-FR-8700	The Contractor shall deliver the IEP State of Security Package (SoS) no later than 60 calendar days after the IEP go-live date. The SoS Package includes: i. Form 14419 (Contractor Statements of Security Assurance) ii. Form 14419A Contractor Statements of Physical Security Assurance (CSPSA) iii. Form 14419B (State of Security Questionnaire) iv. System Security Plan (SSP)
1386156	PSS-FR-9200	The Contractor shall support in annual FISMA and CSA site reviews conducted by IRS Cybersecurity representatives or designee as required by IRS Publication 4812 (Contractor Security Controls) and IRM 10.8.1 (IT Security Policy and Guidance). Support is defined as providing the IRS and designated contractors access to facilities and personnel, documentation, reports and requested documents.
1386189	PSS-FR-9300	The Contractor shall maintain an IEP System Security Plan (SSP) that describes the systems management, operational and technical security controls implemented to provide the required level of confidentiality, integrity, and availability.
1387393	PSS-FR-9310	The Contractor shall use the IRS designated system to document the SSP.

ELM ID	IEP 2.0 Req ID	Contents
1386202	PSS-FR-9400	The Contractor shall maintain the following documents in support of annual SCA activities: a. IEP Authorization Boundary Memoranda b. IEP Privacy/Civil Liberties Impact Assessment (PCLIA) (IRM 10.5.2) c. IEP Interconnection Security Agreement (ISA)

C.3.4.10 Defensive Cyber Operations

ELM ID	IEP 2.0 Req ID	Contents
1387394	PSS-FR-11800	The Contractor shall protect IEP infrastructure and the IRS applications hosted in this infrastructure from scripted attacks and exploits (bots) by using both active and passive protection methods.
1387395	PSS-FR-11810	The Contractor shall provide Web Application Firewall (WAF) services cyber attacks and exploits, including: SQL Injection, DDOS, screen scraping. WAF must also enable IP reputation, rate limiting, caching, event logging and IP blocking.
1387396	PSS-FR-11820	The Contractor shall utilize hunting capabilities to do extensive searching for intrusions of the IEP infrastructure.
1387397	PSS-FR-11830	The Contractor shall research and present new technologies and capabilities to prevent current and future cyber threats to IRS applications.
1387398	PSS-FR-11840	The Contractor shall provide IRS or third party testers access to lower (non-production) environments to perform testing of IEP applications.
1387399	PSS-FR-11850	The Contractor shall provide authorized stakeholders with IEP traffic and trends analyses.
1387400	PSS-FR-11860	The Contractor shall provide services to enhance locating and isolating 'bad actors'; services must provide information from external environments, including: Anonymizing VPN services, Tor Exit nodes, public proxies, residential proxies, and hosting providers/data centers.
1387401	PSS-FR-11870	The Contractor shall provide security services to enhance transaction information, including the following information points: information regarding IP risk reason, email checks (with Privacy Government Liaison and Disclosure (PGLD) office permission), Device ID's.

C.3.4.11 Portal Applications Security

ELM ID	IEP 2.0 Req ID	Contents
1386148	PSS-FR-9500	The Contractor shall provide IRS with access to IT infrastructure and applications for periodic vulnerability scanning, penetration testing and independent validation and verification of security controls, including access to applications not developed by the Contractor. The Contractor shall provide IRS remote access and onsite access at the Contractor's facilities.
1386220	PSS-FR-9600	The Contractor shall ensure all applications hosted on IEP are approved through the IRS Enterprise Lifecycle Compliant Security Change Request process.
1386225	PSS-FR-10000	The Contractor shall test all Contractor-developed custom source code in a production-like environment using approved vulnerability assessment tools.

ELM ID	IEP 2.0 Req ID	Contents
1386112	PSS-FR-9900	The Contractor shall validate that all custom developed software, components, utilities, and tools are documented in the IEP system inventory, are approved to operate prior to production deployment, and the appropriate application security controls are documented in the IEP SSP in accordance with current and future revisions of NIST SP 800-37 (Guide for Applying the Risk Management Framework to Federal Information Systems: A Security Life Cycle Approach).
1386151	PSS-FR-10100	The Contractor shall support application Business Owners in assessing privacy exposure risk for application-level Privacy/Civil Liberties Impact Assessment (PCLIA) for new applications and for significant changes to existing applications, prior to development and in accordance with IRM 10.5.2, Privacy and Information Protection, Privacy Compliance and Assurance (PCA) Program. .
1386224	PSS-FR-10200	The Contractor shall remediate all vulnerabilities and misconfigurations discovered during custom-developed software source code testing prior to production deployment.
1386139	PSS-FR-10300	The Contractor shall document security requirements in a separate section of the requirements traceability matrix for contractor-developed systems, so they can be traced through the development life cycle.
1386138	PSS-FR-10400	In order to facilitate required application vulnerability scanning, the Contractor shall provide valid logins, navigation details, and any architecture or administrative information to the IRS (and authorized IRS contractor) test team.

C.3.4.12   Security Policy

C.3.4.12.1 Protecting Taxpayer Data

ELM ID	IEP 2.0 Req ID	Contents
1386197	PSS-FR-10500	The Contractor shall protect taxpayer data in accordance with IRS guidelines and polices (Refer to IRS Publication 4812, Contractor Security Controls, IRM 10.8.1, IT Security Policy and Guidance, IRM 10.8.24 IRS Cloud Security and IRM 10.5.2, Privacy and Information Protection, Privacy Compliance and Assurance (PCA) Program) and Publication 1075, Tax Information Security Guidelines For Federal, State and Local Agencies Safeguards for Protecting Federal Tax Returns and Return Information).
1386094	PSS-FR-10700	The Contractor shall protect taxpayer data in accordance with current and future applicable Federal and IRS regulations and policies (refer to OMB M-07-16, Safeguarding Against and Responding to the Breach of Personally Identifiable Information, NIST SP 800-53 Rev. 5, Security and Privacy Controls for Federal Information Systems and Organizations, NIST SP 800-144, Guidelines on Security and Privacy in Public Cloud Computing, NIST SP 800-122, Guide to Protecting the Confidentiality of Personally Identifiable Information (PII), IRS Publication 4812, Contractor Security Controls and IRM 10.8.1, IT Security Policy and Guidance).
1386207	PSS-FR-10800	The Contractor shall operate privacy controls to prevent, detect and report breaches of taxpayer data.

ELM ID	IEP 2.0 Req ID	Contents
1387405	PSS-FR-10810	The Contractor shall provide a Key Management Practices Statement, in accordance with National Institute of Standards and Technology (NIST) Special Publication 800-57, Part 1, 2 and 3.
1387406	PSS-FR-10820	The Contractor shall enable encryption for data at rest for any part of IEP that stores SBU, PII or TPI.

C.3.4.12.2 Access Management

ELM ID	IEP 2.0 Req ID	Contents
1386099	PSS-FR-10900	The Contractor shall develop and maintain an IRS-approved IEP Access Management Plan (AMP), which includes: Audit and Accountability (AU) controls and process and standard protocols for making changes in IEP Systems Accounts access for both internal and client resources and the certificate management process.
1386140	PSS-FR-11000	The Contractor shall manage internal certificate replacement within the IEP infrastructure.
1387407	PSS-FR-11010	The Contractor shall support the IRS certificate management process through coordination with IEP deployment process for end-to-end system impact analysis.
1387408	PSS-FR-11020	The Contractor will utilize a Zero Trust capability for all MSP and IRS employee users accessing IEP.

C.3.4.12.3 Authority to Operate (ATO) Management

ELM ID	IEP 2.0 Req ID	Contents
1386184	PSS-FR-11100	The Contractor shall maintain an IEP Authority to Operate (ATO) from an IRS-recognized accreditation authority.
1386143	PSS-FR-11200	The Contractor must obtain an ATO from an IRS Authorizing Official prior to any taxpayer data being received, stored, or transmitted.
1386206	PSS-FR-11400	The Contractor shall ensure that any application or system is granted an ATO before being placed into production or using production data.
1387410	PSS-FR-11410	The Contractor shall prevent any systems with known critical/high vulnerabilities or misconfigurations from being installed in production environments.

C.3.4.12.4 Conformance

ELM ID	IEP 2.0 Req ID	Contents
1386108	PSS-FR-11700	The Contractor shall ensure that all security management plans and processes align with IRS Security management plans and processes.

C.3.4.13   Security Work Request Support

The objective of Security Work Request Support is for the contractor to be capable of providing additional services to meet work request requirements.

ELM ID	IEP 2.0 Req ID	Contents
2559359	PSS-FR-11710	The Contractor shall provide IEP Security services necessary to meet specific work request objectives and requirements.

C.3.5   IEP Application Services

The objective of IEP Applications Services is to provide full life-cycle engineering support for IEP-hosted applications, including operations and maintenance. Services include IRS.gov content management hosting. The requirements in this section are intended to request solutions from the vendor regarding how it will deliver services to existing and future IRS applications and initiatives.

C.3.5.1   Application Engineering Support Services

ELM ID	IEP 2.0 Req ID	Contents
1390544	PAS-FR-100	The Contractor shall be capable of providing full life cycle application development services. These application services will include: working with customers to identify requirements; architecting and designing; testing in accordance with IRS guidelines; releasing to production; enhancement and optimization; and maintaining all related tools, services, and information.
1406553	PAS-FR-110	The Contractor shall be capable of providing enhancement and operations and maintenance services for IRS- and third party-developed applications. These application services will include: testing in accordance with IRS guidelines; releasing to production; enhancement and optimization; and maintaining all related tools and services.
2559323	PAS-FR-120	The Contractor shall be capable of providing application Test Plan/Scenarios/Cases including the activities to be performed on GFE and Non-GFE client computer to ensure accessibility and functionality of applications internal and external to IRS network.
2457889	PAS-FR-200	The Contractor shall provide full life cycle application development services to develop IEP applications in accordance with the IRS delivery model process guidelines and the IEP change and configuration processes (IRM 2.16.1).
1406554	PAS-FR-210	The Contractor shall provide application operations and maintenance (O&M) services in accordance with the IRS delivery model process guidelines (IRM 2.16.1).
1390545	PAS-FR-220	The Contractor shall provide application development services that: a. Comply with the IRS Online Design Guide for irs.gov applications b. Follow the IEP Guide for Application Developers c. Inherit the IEP security requirements. d. Implement application specific security requirements. e. Assist the application business owner to gain and maintain application ATO recommendation via working with IRS Cybersecurity. f. Define hosting requirements for new applications to be hosted in IEP.
1390498	PAS-FR-600	The Contractor shall implement IRS Section 508 requirements in the applications it develops and test to demonstrate compliance to IRS Section 508 office.
1406557	PAS-FR-610	The Contractor shall implement the applicable IRS Reusable Program Level Requirements (RPLRs) on the applications it develops.

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ELM ID	IEP 2.0 Req ID	Contents
1390477	PAS-FR-700	The Contractor shall provide the O&M services for all IEP-hosted applications (contractor- and third party- developed), including: i. Incident management process ii. Problem management process iii. Change management process iv. Deployment process v. Capacity management process vi. Patching management process vii. Technical Review Board process
1390506	PAS-FR-800	The Contractor shall support the application business owner to prepare and maintain the Privacy and Civil Liberties Impact Assessment (PCLIA) for the applications it develops.
1390537	PAS-FR-900	The Contractor shall operate and maintain the IEP-hosted applications developed/managed by the previous IEP MSP (Solicitation Section J, Attachment, *Current State of the IEP Systems and Services*). Application maintenance includes enhancements as needed or as directed by the IRS.
1390488	PAS-FR-1000	The Contractor shall document all processes for load testing IEP systems and components, including contractor-developed IEP applications.
1390543	PAS-FR-1100	The Contractor shall provide services to support applications' workloads, including: a. Scheduling a batch job and receive notifications about the status of the job b. Transferring files to and from the new IEP Environment.
1390497	PAS-FR-4300	The Contractor shall provide an extensible IT infrastructure to accommodate Web Browsers and Operating Systems that may be defined in future application requirements. As future applications are migrated or deployed to the IEP hosting environment, the Contractor shall ensure that IEP supports the required browser and operating system combinations.
1390584	PAS-FR-6800	The Contractor shall provide tailored user training (both initial and recurring as needed) for IRS personnel on IEP tools and services and as they are updated with new features and capabilities.
Pending	PAS-FR-6810	The Contractor shall provide the IRS the complete, fully deployable, fully tested, and working baselined source code and artifacts, for any IRS applications developed by the Contractor. This will include any technical artifacts and components required to successfully build, deploy, and test the application code. The source code shall be delivered in a format and medium agreed to by the IRS application owner.
Pending	PAS-FR-6820	The Contractor shall facilitate IEP application developers' access to open-source components needed for specific IEP application development, deployment, and testing. Access to those open-source components shall be subject to IRS Cybersecurity approval of the components for IRS use.

C.3.5.2   Web User Analysis Data Collection and Analytics

The irs.gov website and its service delivery platforms are the agency's gateways to online service options for taxpayers, tax professionals, and other customers. The overall effectiveness of IRS's digital service offerings depends on the quality, organization, and presentation of these platforms. The government desires a digital Web User Analytics Data Collection and Analytics Solution that is end-to-end, scalable for future growth, meets changing legislative demands, and

is aligned to the mission of the IRS to better serve the American Taxpayer. The solution components must work seamlessly and be performant. It must be future proof in that as the government expands digital services, the solution will scale and continue to handle increases in data volume, type, velocity, and accuracy. The solution must increase data access to greater volumes of trusted data, data modeled for core reporting and data sets certified for use in ad-hoc reporting. The solution shall include as much self-service capabilities as possible where designated IRS employee are granted highest configuration permissions to the extent possible.

ELM ID	IEP 2.0 Req ID	Contents
1390542	PAS-FR-2900	The Contractor shall provide Web User Analysis Data Collection and Analytics Solution to enable the IRS to enhance and improve system performance and user experience across all service delivery platforms to include upgrading and maintaining the platform environment and to ensure that it stays up to date and is running optimally and is always secure.
2457893	PAS-FR-2920	The Contractor shall provide Web User Analysis Data Collection and Analytics Solution across all service delivery platforms for the irs.gov website, including cloud-based applications.
1390541	PAS-FR-3000	The Contractor shall provide a Web User Analysis Data Collection and Analytics Solution able to track web performance metrics for irs.gov website including: a. Visits to the site, applications, page, and content components. b. Click streams. c. Response time. d. Items selected by user on a web page. e. Other datasets recommended by the vendor f. Friendly URL tracking that enables the ability to track when users are redirected by a Friendly URL to an IRS.gov page
2457895	PAS-FR-3010	The Contractor shall provide a Web User Analysis Data Collection and Analytics Solution able to enable IRS analysts to evaluate and report application effectiveness, site traffic patterns, and individual page patterns.
1390530	PAS-FR-3100	The Contractor shall provide a Web User Analysis Data Collection and Analytics Solution with the capability to produce reports on-demand or as scheduled, reflecting historical, trend, and real time information on Web and applications usage metrics.
1390501	PAS-FR-3200	The Contractor shall provide a Web Analytics Report Support Plan that describes how the Web User Analysis Data Collection and Analytics Solution will support new standard and ad-hoc reporting capabilities.
1390509	PAS-FR-3300	The Contractor shall provide the capability for IRS administrators to configure and produce canned and ad hoc reports from the current and historical collected metrics.
1390496	PAS-FR-3400	The Contractor shall retain performance and usage data for time period as mandated by IRS record retention policy in accordance with IRM 1.15, Records and Information Management
1390494	PAS-FR-3500	The Contractor shall provide a customizable Web User Analysis Data Collection and Analytics Solution with a real-time ad-hoc reporting and query capability that has both a scheduling component and a report distribution function.

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ELM ID	IEP 2.0 Req ID	Contents
Pending	PAS-FR-3510	The Contractor shall provide a Web User Analytics Data and Analysis Solution that enables data sharing via industry standard formats and interfaces with Enterprise data repositories, business intelligence reporting, predictive modeling, and other Enterprise data-related systems.
Pending	PAS-FR-3520	The Contractor shall provide a Web User Analytics Data and Analysis Solution that comes with Software Development Kits (SDK) and Application Programming Interfaces (APIs) to enable integration with other Enterprise systems and applications.
Pending	PAS-FR-3530	The Contractor shall provide a Web User Analytics Data and Analysis Solution that enables instant configuration and deployment of tags, triggers, and events on IRS websites and applications.
1390512	PAS-FR-3700	The Contractor shall provide a Web User Analytics Data and Analysis Solution that gives IRS employees self-service visibility into all Web operations for IRS personnel utilizing regular reports and real time Web access to monitor and assess the effectiveness of the Web operations across all service delivery platforms (e.g., Web, mobile, applications, etc.).
1390517	PAS-FR-3800	The Contractor shall transition existing historical measurement data for the portal environments into the new Reports and Analysis solution.
1390538	PAS-FR-3900	The Contractor shall configure and establish initial canned reports prior to implementation in the new IRS Web production environment.
1390519	PAS-FR-4200	The Contractor shall provide a Web User Analytics Data and Analysis Solution that gives IRS employee self-serviced visibility into Web Browser and Operating System traffic to determine relative percentages of traffic requesting services from irs.gov, its delivery platforms, and IRS applications.
1390486	PAS-FR-4500	The Contractor shall provide initial Web User Analysis Data Collection and Analytics Solution plans and documentation as well as updates to reflect changes in the solution.
1390553	PAS-FR-4510	The Contractor shall provide IRS stakeholders initial Web User Analysis Data Collection and Analytics Solution training and training to reflect changes in the Web User Analysis Data Collection and Analytics Solution.
1390480	PAS-FR-4800	The Contractor shall provide a Web User Analysis Data Collection and Analytics Solution with the capability for IRS analysts to produce reports including historical trend reports using both current and archived performance and usage data.
1390493	PAS-FR-5000	The Contractor shall provide a solution which delivers accurate and repeatable data collection, tracking, and reporting analysis.
1390518	PAS-FR-5200	The Contractor shall provide a Web User Analysis Data Collection and Analytics Solution that can accommodate analytic reporting for at least 5 billion hits per month.
1390555	PAS-FR-5210	The Contractor shall provide a Web User Analysis Data Collection and Analytics Solution that can be scalable to accommodate future usage growth.

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ELM ID	IEP 2.0 Req ID	Contents
1390539	PAS-FR-5300	The Contractor shall provide a Web User Analysis Data Collection and Analytics Solution with the capability to track static file downloads from irs.gov and external click-through to irs.gov (forms and publications PDFs). The tracking ability shall be capable of tracking attempted, successful and failed downloads on all IRS.gov static files
1390482	PAS-FR-5400	Under the direction of key IRS personnel, the Contractor shall provide services to assist IRS with analysis to evaluate application effectiveness, site traffic patterns, and individual usage patterns.
1390525	PAS-FR-5500	The Contractor shall provide a Web User Analysis Data Collection and Analytics Solution that will support the inclusion of centrally hosted tracking code for the Digital Analytics Program.
1390557	PAS-FR-5510	The Contractor shall host the tracking code for the Digital Analytics Program and integrate it with Web User Analysis Data Collection and Analytics Solution.
1390559	PAS-FR-6000	The Contractor shall provide a Web User Analysis Data Collection and Analytics Solution with the capability to track the clicks on any link on a page (including according actions) and the link location on the page (body, left navigation, callout, footer, etc.)
1390563	PAS-FR-6200	The Contractor shall provide a Web User Analysis Data Collection and Analytics Solution with the capability to support Navigation Path Tracking which supports tracking access paths to a page. This capability would be able to track the string of pages accessed to get to specific content pages.
1390566	PAS-FR-6300	The Contractor shall provide a Web User Analysis Data Collection and Analytics Solution with the capability to capture the status returned to a user for status tracking applications, such as the "Where's My Refund" application.
1390575	PAS-FR-6400	The Contractor shall provide a Web User Analysis Data Collection and Analytics Solution with the capability to support irs.gov page custom dimensions such that the unique page metadata for the page content is available to IRS data analysts.
1390578	PAS-FR-6500	The Contractor shall provide a Web User Analysis Data Collection and Analytics Solution with the capability to support heat mapping data to represent page/topic access frequency for IRS analysis.
1390585	PAS-FR-7000	The Contractor shall provide a Web User Analysis Data Collection and Analytics Solution with the capability to dynamically scale the sample data size commensurate with the irs.gov traffic load volume. The data size scale before sampling should be aligned with the irs.gov traffic load scale.
1390587	PAS-FR-7100	The Contractor shall provide a Web User Analysis Data Collection and Analytics Solution with the capability to support multiple user access run unsampled data reports.
1390596	PAS-FR-7200	The Contractor shall provide a Web User Analysis Data Collection and Analytics Solution with the capability to scheduling automated reports at user defined intervals and time period.

C.3.5.3   Application Infrastructure Services

ELM ID	IEP 2.0 Req ID	Contents
1390598	PAS-FR-8000	The Contractor shall provide ability to use external tools (as approved by Cyber Security) in all non-production environments, i.e., testing, scanning, quality.
1390602	PAS-FR-8100	The Contractor shall provide the ability for real-time notification to IRS points of contacts of ad-hoc and planned system changes and issues via a messaging platform (e.g., Slack).

C.3.5.4   Application Work Request Support

The objective of Application Work Request Support is for the contractor to be capable of providing additional services to meet work request requirements.

ELM ID	IEP 2.0 Req ID	Contents
2559324	PAS-FR-8110	The Contractor shall provide IEP Application services necessary to meet specific work request objectives and requirements.

C.3.6   Government Furnished Equipment (GFE) Cloud Services

The objective of the GFE Cloud Services is for the contractor to be capable of providing IEP MSP services needed to support application hosting, integration and operations for IRS workloads provisioned and deployed in IRS-provided cloud environments. The IRS cloud environments will be available to the IEP MSP as Government Furnished Equipment (GFE).

The IRS intends to have these services available to be tasked by work requests if needed to support IRS applications being migrated (or developed) to be hosted and operated in the IRS Cloud environments. Additionally, these services could be tasked to support operations and maintenance of common services for IRS cloud applications and secure connections to the IRS Enterprise Computing Center (ECC) (e.g., NetHub).

ELM ID	IEP 2.0 Req ID	Contents
2497107	CWIS-FR-100	The Contractor shall be capable of providing application hosting services in IRS cloud environments necessary to meet specific cloud workloads objectives and requirements.
2497109	CWIS-FR-200	The Contractor shall be capable of following IEP services processes to support cloud workload services to meet cloud workload objectives and requirements, with tailoring only as needed.
2497110	CWIS-FR-300	The Contractor shall be capable of providing security services for the IRS cloud environments necessary to meet specific cloud workloads objectives and requirements.
2497111	CWIS-FR-400	The Contractor shall be capable of providing application services in the IRS cloud environments necessary to meet specific cloud workloads objectives and requirements.
2497112	CWIS-FR-500	The Contractor shall be capable of providing cloud workload transition services as needed to transfer specific IRS cloud environment support responsibilities to the IRS or another 3-party contractor as directed by the IRS. The transition

ELM ID	IEP 2.0 Req ID	Contents
		services will include knowledge transfer support as well as transfer of engineering artifacts and data necessary for uninterrupted cloud workload services.
2497113	CWIS-FR-600	The Contractor shall be capable of providing cloud workload integration services for the IRS cloud environments as needed to meet the corresponding IEP service area requirements applicable to specific cloud workload work packages.
Pending	CWIS-FR-700	The Contractor shall be capable of providing reports and metrics showing data usage into and out of the IRS Cloud GFE.

C.3.7   IEP Transition Services

The objective of the IEP Transition Services is to minimize risk to the continuity of IEP operations associated with contract and MSP transitions. The requirements in this section are intended to request solutions from the contractor regarding how it will effectively move IEP services and ensure continuity of operations. The scope of work for transition is to perform all activities necessary to assume full responsibility for the operation of IEP services with IEP-hosted applications fully operational and the new IEP services are approved for operations by the IRS (Solicitation Section J, Attachment, *Current State of the IEP Systems and Services*). Dependent on IEP 1.5 contract status as of when the IEP 2.0 contract is awarded and filing season related constraints, the IRS plans to accommodate a transition duration for up to 18 months.

Additionally, transition service area requirements support responsibility for transitioning IEP provided services at the end of the IEP contract period of performance to the IRS or an IRS-designated vendor.

C.3.7.1   IEP 2.0 Operational Transition

ELM ID	IEP 2.0 Req ID	Contents
2498720	IEPTS-FR-100	The Contractor shall provide an IEP Services Transition Plan (TP) that establishes and documents the strategy/approach, and activities, to ensure a successful transition from the existing IEP services to establish the new IEP services within the contractually specified time. The transition plan must be approved by the IRS stakeholders impacted by this transition.
2498721	IEPTS-FR-200	The Contractor shall propose transition plan content deemed critical for successful transition, but as a minimum shall include MSP and IRS stakeholder roles and responsibilities, staffing, transition processes, IEP services deliverables schedule, application transition approach, operational security plans, stakeholder training, communications plans, and risk management approach.
2498722	IEPTS-FR-300	The Contractor shall include a draft IEP Services Transition Plan with their proposal.
2498723	IEPTS-FR-400	The Contractor shall provide a final IEP Services Transition plan for IRS approval after contract award and Initial Baseline Review.

ELM ID	IEP 2.0 Req ID	Contents
2498724	IEPTS-FR-500	The Contractor shall conduct IEP transition using an IRS approved IRS delivery model process tailoring plan with approvals for planned transition phases toward full approval to operate IEP services and applications in accordance with IRM 2.16.1.
2498725	IEPTS-FR-600	The Contractor transition planning shall accommodate appropriate filing season constraints to complete full operational transition prior to the end of current IEP contract period of performance.
2498726	IEPTS-FR-700	The Contractor shall assess the migration needs for each application family to propose application migration priorities for IRS approval.
2498729	IEPTS-FR-800	The Contractor shall coordinate with IEP application owners, the incumbent contractor and other IRS stakeholder to plan and manage the migration of each application family until all applications (including applications developed by the incumbent contractor) are fully operational in the new IEP services.
2498731	IEPTS-FR-900	The Contractor shall provide an IEP Transition Status Report to summarize service transition activities and status according to the Transition Plan and schedule.

C.3.7.2 Transition from IEP 2.0 Operations

ELM ID	IEP 2.0 Req ID	Contents
2498732	IEPTS-FR-1000	The Contractor shall be capable of providing a draft IEP Services Termination Plan upon IRS direction that includes proposed activities for transitioning IEP Operations to another service provider within the IEP contract Period of Performance (POP).
2498733	IEPTS-FR-1100	The Contractor Services Termination plan shall identify tasks for knowledge transfer to the IRS and/or IEP 2.0 follow-on service provider and for the shutdown of the IEP 2.0 contract operations.
2498734	IEPTS-FR-1200	The Contractor shall be capable of providing an IEP contract Services termination plan applicable for terminating any part or all of the services provided under the IEP contract.

C.3.7.3 Transition Work Request Support

The objective of Transition Work Request Support is for the contractor to be capable of providing additional services to meet work request requirements.

ELM ID	IEP 2.0 Req ID	Contents
2565880	IEPTS-FR-1210	The Contractor shall provide IEP Transition services necessary to meet specific work request objectives and requirements.

C.4 PERFORMANCE REQUIREMENTS, STANDARDS AND SURVEILLANCE

The Government believes there is value in incorporating Performance-Based Service Acquisition (PBSA) methodology with an outcomes-based focus for this work. The Government's Desired Outcomes, Required Services, Performance Standards, Acceptable Quality Levels, and Monitoring Methods for work described in this PWS will be defined in a Quality Assurance Surveillance Plan described herein.

C.4.1 Performance Requirements

Performance requirements include the Desired Outcomes and Required Services and are defined by the Government. Section X defines the desired outcomes as successfully completing specified Sub-tasks including all deliverables, work products and support. This aligns the Contractor's objectives with the Government objectives, which are to successfully complete the Sub-tasks and deliver value-added products and services to the end users.

C.4.2 Performance Standards

Performance Standards have been identified in Section X.X.

C.4.3 Surveillance

The surveillance process has two interrelated parts: The Monitoring Method and the Quality Assurance Surveillance Plan (QASP). The Contractor shall establish and maintain a complete Quality Control Plan (QCP) in accordance with the QASP (Reference Solicitation Section X, Attachment X.X, *QASP*). This links the Government and Contractor's quality assurance efforts into an integrated package with shared objectives.

C.5 GOVERNMENT- FURNISHED PROPERTY

Government Furnished Property (GFP) (to include material, equipment, and/or information) may be provided in the performance of this contract. See also X.X, X.X and X.X of the contract. The following GFP will be provided to the Contractor:

ITEMS	QUANTITY
Contractor Identification Badge	TBD
Contractor Building Access/Proximity Card	TBD
Desktop Computer with Local Area Network Access	TBD
Office Space (Desk, Chair, Standard Office Equipment)	TBD
Microsoft: Word, Excel, PowerPoint, Project Access	TBD
Telephone With VMS	TBD

Actual QUANTITY is TBD, to be updated post-award, depending on proposed solution needs.

At the end of this contract, disposition of GFP shall be in accordance with Federal Acquisition Regulation (FAR) 52.245.1.

C.6   GOVERNMENT - FURNISHED INFORMATION

Government Furnished Information (GFI) (to include manuals, notes, memos, instruction materials and other information) may be provided in the performance of the work under this PWS. The following GFI will be provided to the Contractor:

INFORMATION ITEMS
Manuals (as needed)
Project Schedule
Relevant Documents

At the end of this contract, disposition of GFI shall be in accordance with FAR 45.101.

APPENDICES

Appendix A   DELIVERABLES

Section C.3.1, IEP Service and Program Integration Services Deliverables:

The Contractor shall propose the delivery period/date and the contents for each of the work products designated "Contractor Proposed" required for IEP Service and Program Integration Services. These work products include the following:

ELM ID	IEP 2.0 Req ID	Contents
1369952	PSPIS-DI-1500	Deliverable: Program Management Plan including all Sections Period: Contractor Proposed Content: Contractor Proposed, in accordance with requirement, PSPIS-FR-100
1369953	PSPIS-DI-1600	Deliverable: Operations Management Framework Period: Contractor Proposed, and updates at as needed for process change or update Content: Contractor Proposed, in accordance with requirements, PSPIS-FR-3020 and PSPIS-FR-3030
1369954	PSPIS-DI-1700	Deliverable: Integrated Master Schedule Period: Contractor Proposed Content: Contractor Proposed, in accordance with requirement, PSPIS-FR-3050
1369955	PSPIS-DI-1800	Deliverable: QA Measurement Methodology Period: Contractor Proposed Content: Contractor Proposed, to include how the contractor will manage their contract quality assurance throughout the period of performance
1369956	PSPIS-DI-1900	Deliverable: Earned Value Management System (EVMS) Reports Period: Monthly Content: Contractor Proposed, in accordance with requirements, PSPIS-FR-2500 and PSPIS-FR-3090
1369958	PSPIS-DI-2000	Deliverable: Innovation Plan Period: Contractor Proposed Content: Contractor Proposed, in accordance with requirement, PSPIS-FR-3130
1369959	PSPIS-DI-2100	Deliverable: Service Level Objectives (SLO) Report Period: Monthly Content: Contractor Proposed, in accordance with requirement, PSPIS-FR-3140

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ELM ID	IEP 2.0 Req ID	Contents
1369960	PSPIS-DI-2200	Deliverable: Privacy/Civil Liberties Impact Assessment (PCLIA) Period: Applicable IRS delivery model process in accordance with IRM 2.16.1 Content: PCLIA shall demonstrate that program managers, system owners, and developers have consciously incorporated privacy and civil liberties protections throughout the entire lifecycle of the system (IRM 10.5.2.2).
1369961	PSPIS-DI-2300	Deliverable: Section 508 Compliance Update Test Plan Period: Transition Content: Provide an updated test plan that outlines products and/or services that are tested for compliance with Section 508 and how the test will be conducted.
1369962	PSPIS-DI-2400	Deliverable: Section 508 Compliance Test Report Period: Prior to Production Content: Provide a test report that reflects the results of the Section 508 test plan that was conducted prior to production
1369963	PSPIS-DI-2500	Deliverable: Accessibility Risk Information Period: Prior to Production Content: Provide the risk impact for any unresolved Section 508 provisional failures
1369964	PSPIS-DI-2600	Deliverable: Accessibility Compliance Approach Period: Prior to Production Content: Explain how the contractor or business owner will address Section 508 issues

Section C.3.2, IEP Infrastructure Services Deliverables:

The Contractor shall propose the delivery period/date and the contents for each of the work products designated "Contractor Proposed" required for IEP Infrastructure Services. These work products include the following:

ELM ID	IEP 2.0 Req ID	Contents
2457848	PIS-DI-300	Deliverable: IEP Infrastructure Services Documentation Period: Contractor Proposed Content: Contractor Proposed, in accordance with requirement, PIS-FR-100

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Section C.3.3, IEP Application Hosting Services Deliverables:

The Contractor will propose the delivery period/date, and the contents for each of the work products designated "Contractor Proposed" required for IEP Application Hosting Services. These work products include the following:

ELM ID	IEP 2.0 Req ID	Contents
1370056	PWHS-DI-200	Deliverable: IEP Application Hosting Concept of Operations (CONOPS), Period: Contractor Proposed Content: Contractor Proposed, in accordance with requirement, PWHS-FR-100
1370057	PWHS-DI-300	Deliverable: IEP Application Hosting Services Status Report Period: Monthly Content: Contractor Proposed; Capacity Management Status Report; Incident/Problem Status Updates; Monitoring Status Reports; Change Management Status Reports; Patch Management Status, and Process Improvement activities.

1385717	PWHS-DI-400	Deliverable: IEP Technical Framework
		
		Period: Contractor Proposed
		
		Content:
		    - Significant Application Design Choices in IEP
		    - Commonly used configuration patterns
		    - Technologies used to deliver the configuration patterns
		    - Core roles and responsibilities for groups leveraging the IEP service offerings

1408900	PWHS-DI-600	Deliverable: Capacity Management Plan Period: Contractor Proposed Content: Contractor Proposed, in accordance with requirements, PWHS-FR-1500, PWHS-FR-1600, and PWHS-FR-2300
Pending	PWHS-DI-610	Deliverable: Capacity Optimization Report Period: Contractor Proposed Content: Contractor proposed, in accordance with requirement, PWHS-FR-2420; to include - candidate applications and resources identified to be optimized - identify potential cost avoidance for the optimized application - financial impact of not optimizing the application - information on the operational risk of not optimizing the application - side-by-side comparison of resources used before and after optimization for the application - record of changes made for the optimized applications for the month that is being reported - long-term historical record of optimizations (quarterly, yearly)

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ELM ID	IEP 2.0 Req ID	Contents
1408899	PWHS-DI-500	Deliverable: Incident Management SOP Period: Contractor Proposed Content: Contractor Proposed, in accordance with requirements, PWHS-FR-2700, PWHS-FR-2900, PWHS-FR-3200, and PWHS-FR-3210
1408902	PWHS-DI-700	Deliverable: Problem Management SOP Period: Contractor Proposed Content: Contractor Proposed, in accordance with requirements, PWHS-FR-3310 and PWHS-FR-3320
1408903	PWHS-DI-800	Deliverable: Monitoring and Performance Management Plan Period: Contractor Proposed Content: Contractor Proposed, in accordance with requirement, PWHS-FR-3600
1408904	PWHS-DI-900	Deliverable: Guide for Application Developers Period: Contractor Proposed Content: Contractor Proposed, in accordance with requirement, PWHS-FR-6400
1408905	PWHS-DI-1000	Deliverable: IEP Engineering Services overview Period: Contractor Proposed Content: Contractor Proposed, in accordance with requirement, PWHS-FR-6500
1408906	PWHS-DI-1100	Deliverable: IEP Services Primer Period: Deliver on an annual basis Content: Contractor Proposed, in accordance with requirement, PWHS-FR-4600
1408907	PWHS-DI-1200	Deliverable: IEP Engineering Services Goals Period: Initial delivery semi-annual; subsequent annually Content: Contractor Proposed, in accordance with requirement, PWHS-FR-6500
1408908	PWHS-DI-1300	Deliverable: IEP Tactical Roadmap Period: Deliver on an annual basis with supporting artifacts (e.g., project backlog, etc.) Content: Contractor Proposed, to include the roadmap for enhancements to the technical solution to continuously improve IEP services
1408909	PWHS-DI-1400	Deliverable: IEP Application Integration Overview Period: Contractor Proposed Content: Contractor Proposed, in accordance with requirements, PWHS-FR-4600, PWHS-FR-4900, and PWHS-FR-6300

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ELM ID	IEP 2.0 Req ID	Contents
1408910	PWHS-DI-1500	Deliverable: Change Management SOP Period: Initial delivery is contractor proposed; Then annually or upon changes to the Change Management process Content: Contractor Proposed, in accordance with requirement, PWHS-FR-7400
1408911	PWHS-DI-1600	Deliverable: Deployment Management SOP Period: Contractor Proposed Content: Contractor Proposed including Deployment Checklist, in accordance with requirement, PWHS-FR-7700
1408912	PWHS-DI-1700	Deliverable: Configuration Management Plan Period: Contractor Proposed Content: Contractor Proposed, in accordance with requirement, PWHS-FR-6600
1408913	PWHS-DI-1800	Deliverable: Patch Management Plan Period: Contractor Proposed Content: Contractor Proposed, in accordance with IRS IRM 10.8.50 (Information Security, Service-wide Security Patch Management), NIST SP 800-40 (Enterprise Patch Management Technologies) and requirement, PWHS-FR-8500
1408914	PWHS-DI-1900	Deliverable: IEP Hosted Application Portfolio configuration report Period: Contractor Proposed Content: Contractor Proposed, in accordance with requirement, PWHS-FR-6710
1408915	PWHS-DI-2000	Deliverable: IEP On-Boarding SOP Period: Contractor Proposed Content: Contractor Proposed, in accordance with requirements, PWHS-FR-8900, PWHS-FR-9100, and PWHS-FR-9200
1408916	PWHS-DI-2100	Deliverable: IEP On-Boarding Metrics Period: Contractor Proposed Content: Contractor Proposed, in accordance with requirement, PWHS-FR-9300
1408917	PWHS-DI-2200	Deliverable: IEP Service Desk SOP Period: Contractor Proposed Content: Contractor Proposed, in accordance with requirement, PWHS-FR-9800

ELM ID	IEP 2.0 Req ID	Contents
Pending	PWHS- DI-2300	Deliverable: IEP Cloud Roadmap Period: Deliver on an annual basis with supporting artifacts (e.g., cloud computing reference architecture, etc.) Content: Contractor Proposed based on IRS Enterprise Cloud Strategy, to include the roadmap for enhancements needed to continuously improve IEP services

Section C.3.3, IEP Application Hosting Services Information Available to IRS:

Routine Application Hosting Services information should be made available to the IRS. This information should be considered work products and transient information. Frequency of delivery and minimal required content should be specified in the related Application Hosting process definitions. The Contractor shall provide sufficient information to provide a full and accurate depiction of the process status in the reporting period. Automated or online information availability is the preferred access mechanism.

ELM ID	IEP 2.0 Req ID	Contents
1408901	PWHS-WP-1800	Throughput Report, in accordance with requirement, PWHS-FR-4200

Section C.3.4, IEP Security Services Deliverables

The Contractor shall update security process plans when changes occur and ensure there is a review on at least an annual basis. Examples of scenarios that would prompt updates to security plans include security control assessments, changes in policy or procedure, changes in requirements, process or technology improvements and changes in laws or NIST guidance.

The Contractor shall create and maintain IEP 2.0 Security process documents that capture all aspects of the services provided including regulatory compliance, define the operational metrics and measures used to calculate the Service Level Objectives (SLO), and define status reporting elements and frequencies. These documents are under full project configuration control.

The Contractor will obtain approval from the IRS for changes to security plans through the project Change Management process.

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ELM ID	IEP 2.0 Req ID	Contents
1387425	PSS-DI-2200	Deliverable: Security Impact Assessment (SIA) Period: Contractor Proposed Content: The Contractor shall develop a Security Impact Assessment (SIA) process that complies with current and future revisions of NIST SP 800-30 (Guide for Conducting Risk Assessments). This process shall be documented in the Security Configuration and Change Management Plan.
1386177	PSS-DI-200	Deliverable: Updated Security Process Plans Period: At least annually Content: The Contractor shall update security process plans when changes occur and ensure there is a review on at least annually. Examples of scenarios that would prompt updates to security plans include security control assessments, changes in policy or procedure, changes in requirements, process or technology improvements and changes in laws or NIST guidance.
1386104	PSS-DI-500	Deliverable: IEP Continuous Monitoring Plan Period: At least annually Content: Contractor Proposed, in accordance with requirement, PSS-FR-3000
1386152	PSS-DI-600	Deliverable: IEP Security Configuration and Change Management Plan Period: At least annually Content: Contractor Proposed, in accordance with requirement, PSS-FR-4600
1386171	PSS-DI-800	Deliverable: IEP Security Patch and Vulnerability Management Plan Period: At least annually Content: Contractor Proposed, in accordance with requirement, PSS-FR-1700
1386157	PSS-DI-900	Deliverable: IEP Security Incident Handling, Monitoring and Response Plan Period: At least annually Content: Contractor Proposed, in accordance with requirement, PSS-FR-6300
1386212	PSS-DI-1000	Deliverable: IEP Information System Contingency Plan (ISCP) Period: At least annually Content: Contractor Proposed, in accordance with requirement, PSS-FR-6500
1386134	PSS-DI-1100	Deliverable: IEP Security Concept of Operations (Security CONOPS) Period: At least annually Content: Contractor Proposed, in accordance with requirement, PSS-FR-800
1386109	PSS-DI-1200	Deliverable: IEP Access Management Plan (AMP) Period: At least annually or as needed Content: Contractor Proposed, in accordance with requirement, PSS-FR-10900

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ELM ID	IEP 2.0 Req ID	Contents
1386233	PSS-DI-1300	Deliverable: IEP System Security Plan (SSP) Period: Contractor Proposed Content: The contractor will utilize a Government Furnished System to document the SSP. Instructions on access and use will provided after contract award, in accordance with requirement, PSS-FR-9300
1386092	PSS-DI-1400	Deliverable: IEP Authorization Boundary Memorandum Period: At least annually Content: Contractor Proposed; normally part of the SSP, but usually updated prior to the full SSP, in accordance with requirement, PSS-FR-9400
1386150	PSS-DI-1500	Deliverable: IEP Interconnection Security Agreements (ISA) Period: At least annually or as required Content: The ISA defines the security controls between interconnected systems and authorizes the connection from one information system to other systems outside of the IRS.
1386164	PSS-DI-1600	Deliverable: IEP Security Control Assessment (SCA) Test Plan Period: At least annually Content: Contractor proposed, per requirements in C.3.4.9 Security Control Assessment (SCA) and Contractor Security Assessment (CSA), in accordance with IRM 2.16.1.
1386214	PSS-DI-1700	Deliverable: IEP Security Assessment Report (SAR) Mitigation Plan Period: Annual (prior to ASCA closeout) Content: This deliverable is dependent on the completion of the SAR document with findings from SCA Testing and Cyber Assessments. The SAR documents are developed by the IRS Cybersecurity FISMA Certification Program Office and the IRS Cloud Security Assessment Team, in accordance with requirement, PSS-FR-1510
1386191	PSS-DI-1800	Deliverable: IEP Privacy/Civil Liberties Impact Assessment (PCLIA) Period: When changes are required or every 3 years Content: Contractor proposed, in accordance with requirements, PSS-FR-9400 and PSS-FR-10100
1386193	PSS-DI-1900	Deliverable: IEP State of Security (SoS) Package Period: Annually Content: Contractor proposed, in accordance with requirement, PSS-FR-8700.
1386172	PSS-DI-2000	Deliverable: FISMA Compliance Reports including, but not limited to, inventory, inventory change log, security configuration compliance reports, personal security, and POA&Ms. Period: Monthly Content: Contractor proposed, in accordance with requirement, PSS-FR-3800

IEP 2.0 Performance Work Statement

ELM ID	IEP 2.0 Req ID	Contents
1386192	PSS-DI-2100	Deliverable: IEP Information Security Status Package Period: Monthly Content: Includes validation of timely delivery and acceptance of FISMA Compliance Reports, Summary of incidents and actions from Weekly Status Report and POA&M status. Under separate cover: Executive Summary
1387417	PSS-DI-2300	Deliverable: IEP Alternate Site Processing Environment (ASPE) Plan Period: Annual Content: Contractor will provide plan to move operations to alternate site. This will include annual test plan, in accordance with requirements, PSS-FR-6800 and PSS-FR-6900
1387419	PSS-DI-2500	Deliverable: Executive Summary of Analytical Results and Recommendations Period: Contractor Proposed Content: Contractor Proposed, to include analysis information on new or emerging threats and recommendations for executive level consideration
1387420	PSS-DI-2600	Deliverable: Key Management Practices Statement Period: Annual Content: Plan will document processes, key POC's for management of security keys and systems used to implement processes
1387421	PSS-DI-2700	Deliverable: IEP Contractor Security Assessments (CSA) Test Plan Period: Annual Content: Plan will be in accordance with IRS Publication 4812 and requirement, PSS-FR-8600

Security Reports

Reports should be considered work products and transient information. Frequency of delivery and minimal required content should be specified in the related **Security Services Process Documents**.

1. The Contractor shall provide sufficient information to provide a full and accurate depiction of the security status in the reporting period. Automated or online status reporting is recommended.

2. The Contactor should provide consistent and consolidated security reporting that reflects the unique security requirements supported in each portal work stream (PUP, RUP, EUP, TPE etc.) and environments (Dev, Test, EITE, PETE, Prod).

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ELM ID	IEP 2.0 Req ID	Contents
1386128	PSS-WP-300	Deliverable: Weekly IEP Security Status Report Period: Weekly during contract period of performance Content: The Contractor shall summarize how they followed up on potential incidents and suspicious activity to mitigate risks and prevent breaches. The Contractor shall submit detailed evidence along with the report that shows the steps they performed to follow-up with each potential incident and suspicious activity. This evidence includes the details of all analysis performed to close SIEM tickets, even if those tickets were not communicated to CSIRC. Examples of the Weekly Security Status reports include: Status of ongoing Security Operation and planned activities, schedule for FISMA Compliance Reports, actions resulting from analytic results, and POA&M status.
1387424	PSS-WP-1200	Deliverable: Monthly IEP Security Status Report Period: Monthly during contract period of performance Content: The Contractor shall summarize how they followed up on potential incidents and suspicious activity to mitigate risks and prevent breaches. The Contractor shall submit detailed evidence along with the report that shows the steps they performed to follow-up with each potential incident and suspicious activity. This evidence includes the details of all analysis performed to close SIEM tickets, even if those tickets were not communicated to CSIRC. Examples of the Weekly Security Status reports include: Status of ongoing Security Operation and planned activities, schedule for FISMA Compliance Reports, actions resulting from analytic results, and POA&M status.
1386167	PSS-WP-400	Deliverable: Vulnerability Assessment and Configuration (Analysis) Summary Period: Contractor Proposed Content: The Vulnerability Assessment and Configuration (Analysis) Summary contains the status of vulnerabilities and Contractor's effort to remediate them through patches or secure configurations. This report will also provide information regarding policy settings in cloud services used to provide IEP services
1386123	PSS-WP-500	Deliverable: IEP Configuration Compliance Summary Report Period: Contractor Proposed Content: Contains the NIST compliance summary and details for all the servers and devices in the IEP 2.0 environment. It should be easy for the recipient of this report to identify the configuration weaknesses in the environment, particularly critical and high-risk weaknesses. Weaknesses should be tracked in the Mitigation Report and mitigated in the same manner as other findings from SCA tests, etc.
1386090	PSS-WP-600	Deliverable: Security Incident Report Period: As required Content: Contains the detailed investigation documentation for each potential/suspected incidents detected and investigated by the Contractor security operations team. This includes the details of the analysis performed to close the SIEM ticket escalated from a third-party subcontractor to Contractor.

IEP 2.0 Performance Work Statement

ELM ID	IEP 2.0 Req ID	Contents
1386163	PSS-WP-700	Deliverable: Mitigation Report Period: Contractor Proposed Content: Contains the details of open and closed security findings and mitigations taken to close them.
1386102	PSS-WP-800	Deliverable: IEP 1.5 Security Risk Assessment (SRA) Mitigation Report Period: Contractor Proposed Content: Provides planned mitigation actions necessary to address findings in the Security Risk Assessment (SRA). This deliverable is dependent on the completion of the SRA document. The SRA document is developed by the IRS Security Assessment Services (SAS) team. (per description in IEP 2.0 Req PSS-FR-1500) and it is an ad-hoc report. This document is related to Risk Management Framework (RMF) (refer to C.3.4.1 Security Risk Management Framework) and Cybersecurity's Security Change request process (Managed Service Security Impact Assessment) (in accordance with requirement, PSS-FR-9600).
1386217	PSS-WP-900	Deliverable: IEP 1.5 Incident Response Test Report Period: Contractor Proposed Content: Details results of the quarterly incident response simulation provided following quarterly test (per description in requirement, PSS-FR-6300).

Section C.3.5, IEP Application Services Deliverables:

ELM ID	IEP 2.0 Req ID	Contents
1390505	PAS-DI-400	Deliverable: Application Test Plans Period: As scheduled Content: Contractor Proposed, in accordance with IRM 2.16.1 and requirement, PAS-FR-120
1390532	PAS-DI-300	Deliverable: Integration Test Results Period: As scheduled Content: Contractor Proposed, in accordance with IRM 2.16.1
1390475	PAS-DI-200	Deliverable: Application Migration Plan and Strategy Period: Contractor Proposed and as updated Content: Contractor Proposed, in accordance requirements, IEPTS-FR-700 and IEPTS-FR-800

Section C.3.6, GFE Cloud Services Deliverables:

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ELM ID	IEP 2.0 Req ID	Contents
2497114	CWIS-DI-100	Deliverable: GFE Cloud Services status report Period: Monthly Content: Summary of cloud services activities to include dated accomplishments and quantified accomplishments and IRS milestones met.
2497115	CWIS-DI-200	Deliverable: Work Request Technical Artifacts Period: As scheduled Content: Per work request requirements and Contractor Proposed, to include System Test Cases and Results, IRS delivery model process artifacts as tailored, regression test results, UAT demonstrations and material, knowledge transfer materials in accordance with IRM 2.16.1

Section C.3.7, IEP Transition Services Deliverables:

ELM ID	IEP 2.0 Req ID	Contents

2498735	IEPTS-DI-100	Deliverable: IEP Services Transition Plan
		
		Period: Draft with proposal
		
		     Final after contract award and IBR
		
		     Updates as needed
		
		Content: Contractor proposed, to include MSP and IRS stakeholder roles and responsibilities, staffing, transition processes, IEP services deliverables schedule, application transition approach, operational security plans, stakeholder training, communications plans, and risk management approach.

2498736	IEPTS-DI-200	Deliverable: Transition Status Report Period: As scheduled per transition plan, but a least monthly Content: Contractor proposed, to include summary of transition activities, Project progress and schedule update with upcoming milestones - Risks and Issues encountered with associated mitigation strategies - Action item assignments and status.
2498737	IEPTS-DI-300	Deliverable: IEP Stakeholder Training Plan Period: As schedule per transition plan Content: Contractor proposed, plan to train IEP stakeholders on IEP services and operations during and after transition
2498738	IEPTS-DI-400	Deliverable: IEP Transition Integrated Master Schedule Period: Include with final Transition Plan Updated weekly or as required Content: Contractor proposed, to include critical paths and IRS delivery model process and major milestones for successful transition in accordance with IRM 2.16.1

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ELM ID	IEP 2.0 Req ID	Contents
2498739	IEPTS-DI-500	Deliverable: IEP Transition Technical Artifacts Period: As scheduled Content: Contractor proposed to include application family transition plans, System Test Cases and Results, IRS delivery model process artifacts as tailored, integration and regression test results, IEP service area deliverables, UAT demonstrations and material, knowledge transfer materials in accordance with IRM 2.16.1
2498740	IEPTS-DI-600	Deliverable: IEP Services Termination Plan Period: As required per work request Content: Contractor proposed, in accordance with requirements, IEPTS-FR-1000, IEPTS-FR-1200 and IEPTS-FR-1200

Appendix B   REFERENCES

Note: The URLs in the table below are accessible to the public through IRS.gov. The shaded rows are Internal Revenue Manuals (IRMs) with redacted versions on IRS.gov.

IRMs:

Title/Date	How to Obtain	PWS Reference Para.
IRM 1.15, Records and Information Management February 5, 2021	https://www.irs.gov/irm/part1/irm_01-015-001	C.3.3.5 Monitoring C.3.5.2 Web User Analysis Data Collection and Analytics
IRM 2.16.1, Enterprise Life Cycle (ELC) September 15, 2022	https://www.irs.gov/irm/part2/irm_02-016-001	C.3.1 IEP Service and Program Integration Services, Service Delivery C.3.3 IEP Application Hosting Services C.3.4 IEP Security Services
IRM 2.17.1, Infrastructure Currency, Infrastructure Currency Policy for Software October 26, 2020	https://www.irs.gov/irm/part2/irm_02-017-001	C.3.2.2 Reliability
IRM 2.22.1 Unified Work Request (UWR) Process January 27, 2020	https://www.irs.gov/irm/part2/irm_02-022-001	C.3.1.3 Service Integration Work
IRM 2.25.2, IRS Portal and Extranet Usage Standard February 26, 2018	https://www.irs.gov/irm/part2/irm_02-025-002	C.1.1 BACKGROUND
IRM 2.142.1, Service Catalog Management Directive June 04, 2020	https://www.irs.gov/irm/part2/irm_02-142-001	C.3.3.8 Service Catalog
IRM 2.144 Capacity Management October 01, 2019	https://www.irs.gov/irm/part2/irm_02-144-001	C.3.3.2 Capacity Management
IRM 2.148.2, Incident Management Process May 11, 2020	https://www.irs.gov/irm/part2/irm_02-148-002.html	C.3.3.3 Incident Management

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Title/Date	How to Obtain	PWS Reference Para.
IRM 2.150.2 Configuration and Change Management, Configuration Management November 14, 2022	https://www.irs.gov/irm/part2/irm_02-150-002.html	C.3.3.7 Configuration and Change Management
IRM 2.150.2.3 Configuration Identification Index and Document Versioning Guidelines August 19, 2020	https://www.irs.gov/irm/part2/irm_02-150-002#idm139633332617072	C.3.1.1 Program Management
IRM 10.5.2, Privacy and Information Protection, Privacy Compliance and Assurance (PCA) Program January 24, 2020	https://www.irs.gov/irm/part10/irm_10-005-002.html	C.3.4.12.1 Protecting Taxpayer Data C.3.4.11 Portal Applications Security
IRM 10.8.1, IT Security Policy and Guidance December 13, 2022	https://www.irs.gov/irm/part10/irm_10-008-001r	C.3.4.1 Security Risk Management Framework C.3.4.3 Plan of Action and Milestones (POA&M) C.3.4.4.1 Continuous Monitoring C.3.4.6 Security Audit C.3.4.7 Incident Handling C.3.4.8 Business Continuity C.3.4.9 Security Control Assessment (SCA) and Contractor Security Assessment (CSA) C.3.4.12.1 Protecting Taxpayer Data
IRM 10.8.9, Information Technology (IT) Security, Virtualization Security Policy. April 29, 2016	https://www.irs.gov/irm/part10/index.html	C.3.4.5 Security Configuration and Change Management
IRM 10.8.21, Information Technology (IT) Security, Database Security Policy September 23, 2021	https://www.irs.gov/irm/part10/irm_10-008-021r	C.3.4.5 Security Configuration and Change Management
IRM 10.8.22, Information Technology (IT) Security, Web Server Security Policy February 08, 2022	https://www.irs.gov/irm/part10/irm_10-008-022r	C.3.4.5 Security Configuration and Change Management

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Title/Date	How to Obtain	PWS Reference Para.
IRM 10.8.24, Cloud Computing Security Policy September 28, 2021	https://www.irs.gov/irm/part10/irm_10-008-024r	C.3.4.12.1 Protecting Taxpayer Data
IRS IRM 10.8.50, Information Technology (IT) Security, Servicewide Security Patch Management November 25, 2020	https://www.irs.gov/irm/part10/irm_10-008-050r	C.3.4.2 Patch and Vulnerability Management
IRM 10.8.60 IRM IT Service Continuity Management (ITSCM) Policy and Guidance July 16, 2021	https://www.irs.gov/irm/part10/irm_10-008-060r	C.3.3.6 Application Infrastructure Integration Services (AIIS) C.3.5 IEP Application Services, AIIS
IRM 10.8.62 Information System Contingency Plan (ISCP) and Disaster Recovery (DR) Test, Training, and Exercise (TT&E) Process February 24, 2022	https://www.irs.gov/irm/part10/irm_10-008-062	C.3.4.8 Business Continuity

IRS Directives and Memorandums:

Title	How to Obtain	PWS Reference Para.
IRS Publication 4812, *Contractor Security Controls*	https://www.irs.gov/pub/irs-pdf/p4812.pdf	C.3.4.1 Security Risk Management Framework C.3.4.3 Plan of Action and Milestones (POA&M) C.3.4.4.1 Continuous Monitoring C.3.4.6 Security Audit C.3.4.7 Incident Handling C.3.4.8 Business Continuity C.3.4.9 Security Control Assessment (SCA) and Contractor Security Assessment (CSA) C.3.4.12.1 Protecting Taxpayer Data
IRS Integrated Enterprise Portals Privacy Impact Assessment	https://www.irs.gov/pub/irs-utl/IEP-pia.pdf	C.3.4.9 Security Control Assessment (SCA) and Contractor Security Assessment (CSA)
Publication 1075 Tax Information Security Guidelines	https://www.irs.gov/pub/irs-pdf/p1075.pdf	C.3.4.12.1 Protecting Taxpayer Data

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Title	How to Obtain	PWS Reference Para.
For Federal, State and Local Agencies Safeguards for Protecting Federal Tax Returns and Return Information		
IRS Cloud Cybersecurity Authorization Playbook	https://portal.ds.irsnet.gov/sites/ESCloudFrontDoor/CSX/Program%20Management/Cloud%20Front%20Door/IRS%20Cloud%20Cybersecurity%20Authorization%20Playbook_v6.0.pdf#search=cloud%20authorization%20playbook	C.3.4.1 Security Risk Management Framework
IRS Online Design Guide	https://online-design-guide-master-pl.irslabs.org/	C.3.5.1 Application Engineering Support Services

PMBoK Requirements:

Title	How to Obtain	PWS Reference Para.
PMI's *A Guide to the Project Management Body of Knowledge (PMBOK® Guide), Seventh Edition* (ISBN-13 978-1628256642)	https://pmi.bookstore.ipgbook.com/a-guide-to-the-project-management-body-of-knowledge--pmbok---guide-----seventh-edition-and-the-standard-for-project-management--english--products-9781628256642.php	C.2.2 CONTRACT CONSTRAINTS
PMI's *The Standard for Program Management, Fourth Edition* (ISBN-13: 978-1628251968)	https://pmi.bookstore.ipgbook.com/the-standard-for-program-management-products-9781628251968.php	C.2.2 CONTRACT CONSTRAINTS
Project Management Institute's (PMI's) *Government Extension to the PMBOK® Guide, Third Edition* (ISBN 9781930699915)	https://pmi.bookstore.ipgbook.com/government-extension-to-the-pmbok---guide-third-edition-products-9781628253634.php	C.2.2 CONTRACT CONSTRAINTS

Office of Management and Budget (OMB):

Title	How to Obtain	PWS Reference Para.
OMB Circular A-130, *Managing Information as a Strategic Resource*	https://www.federalregister.gov/articles/2016/07/28/2016-17872/revision-of-omb-circular-no-a-130-managing-information-as-a-strategic-resource	C.3.4 Security Risk Management Framework

IEP 2.0 Performance Work Statement

Title	How to Obtain	PWS Reference Para.
OMB M-07-16, *Safeguarding Against and Responding to the Breach of Personally Identifiable Information*	https://www.whitehouse.gov/wp-content/uploads/legacy_drupal_files/omb/memoranda/2007/m07-16.pdf	C.3.4.12.1 Protecting Taxpayer Data
OMB M-14-03, *Enhancing the Security of Federal Information and Information Systems*	https://www.whitehouse.gov/wp-content/uploads/legacy_drupal_files/omb/memoranda/2014/m-14-03.pdf	C.3.4.1 Security Risk Management Framework
OMB M-15-01, *Fiscal Year 2014-2015 Guidance on Improving Federal Information Security and Privacy Management Practices*	https://www.whitehouse.gov/wp-content/uploads/legacy_drupal_files/omb/memoranda/2015/m-15-01.pdf	C.3.4.1 Security Risk Management Framework
OMB M-22-18, *Enhancing the Security of the Software Supply Chain through Secure Software Development Practices.*	https://www.whitehouse.gov/wp-content/uploads/2022/09/M-22-18.pdf	C.3.4.1 Security Risk Management Framework

Federal Acts and Programs:

Title	How to Obtain	PWS Reference Para.
Affordable Care Act (ACA)	https://www.irs.gov/affordable-care-act	C.1 INTRODUCTION C.1.1 BACKGROUND
Digital Analytics Program (DAP)	https://digital.gov/guides/dap/	C.3.5.2 Web User Analysis Data Collection and Analytics
E-Government Act of 2002	https://www.congress.gov/bill/107th-congress/house-bill/2458	C.3.3.1 Application Hosting Support C.3.4 IEP Security Services
Federal Acquisition Regulation (FAR) 52.245.1	https://www.acquisition.gov/far/52.245-1	C.5 GOVERNMENT- FURNISHED PROPERTY
Federal Information Security Management Act (FISMA)	https://www.cisa.gov/federal-information-security-modernization-act	C.1 INTRODUCTION C.3.3.1 Application Hosting Support C.3.4.4.1 Continuous Monitoring C.3.4 IEP Security Services, Security Services – Deliverables

Federal Risk and Authorization Management Program (FedRAMP)	https://www.fedramp.gov/	C.2.2 CONTRACT CONSTRAINTS
Foreign Account Tax Compliance Act (FATCA)	https://www.irs.gov/businesses/corporations/foreign-account-tax-compliance-act-fatca	C.2.2 CONTRACT CONSTRAINTS
Health Insurance Portability and Accountability Act (HIPAA) of 1996	https://aspe.hhs.gov/reports/health-insurance-portability-accountability-act-1996	C.2.2 CONTRACT CONSTRAINTS
National Archives and Records Administration (NARA)	https://www.archives.gov/	C.2.2 CONTRACT CONSTRAINTS

National Institute of Standards and Technology (NIST) Special Publications and Manuals: *(as listed or applicable current version)*

Title	How to Obtain	PWS Reference Para.
NIST SP 500-267Br1, USGv6 Profile	https://nvlpubs.nist.gov/nistpubs/specialpublications/NIST.SP.500-267Br1.pdf	C.3.2 IEP Infrastructure Services
NIST SP 500-281Br1, USGv6 Test Methods: General Description and Validation	https://nvlpubs.nist.gov/nistpubs/specialpublications/NIST.SP.500-281Br1.pdf	C.3.2 IEP Infrastructure Services
NIST SP 800-12, Introduction to Information Security	https://csrc.nist.gov/publications/sp800	C.3.4.6 Security Audit
NIST SP 800-14, Generally Accepted Principles and Practices for Securing Information Technology Systems	https://csrc.nist.rip/publications/nistpubs/800-14/800-14.pdf	C.3.4.4.1 Continuous Monitoring C.3.4.5 Security Configuration and Change Management
NIST SP 800-18 Rev. 1, Guide for Developing Security Plans for Federal Information Systems	https://csrc.nist.gov/publications/sp800	C.3.4.6 Security Audit
NIST SP 800-30 Rev. 1, Guide for Conducting Risk Assessments	https://csrc.nist.gov/publications/sp800	C.3.4.5 Security Configuration and Change Management
NIST SP 800-34 Rev. 1, Contingency Planning Guide for Federal Information Systems	https://csrc.nist.gov/publications/sp800	C.3.4.8 Business Continuity

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Title	How to Obtain	PWS Reference Para.
NIST SP 800-37, Rev. 2, Guide for Applying the Risk Management Framework to Federal Information Systems: A Security Life Cycle Approach	https://csrc.nist.gov/publications/sp800	C.3.4.5 Security Configuration and Change Management C.3.4.9 Security Control Assessment (SCA) and Contractor Security Assessment (CSA)
NIST SP 800-39, Managing Information Security Risk Organization, Mission, and Information System View	https://csrc.nist.gov/publications/sp800	C.3.4.1 Security Risk Management Framework
NIST SP 800-40 Rev. 4, Guide to Enterprise Patch Management Technologies	https://csrc.nist.gov/publications/sp800	C.3.4.2 Patch and Vulnerability Management
NIST SP 800-53 Rev. 5, Security and Privacy Controls for Federal Information Systems and Organizations	https://csrc.nist.gov/publications/sp800	C.2.2 CONTRACT CONSTRAINTS C.3.4.1 Security Risk Management Framework C.3.4.12.1 Protecting Taxpayer Data C.3.4.9 Security Control Assessment (SCA) and Contractor Security Assessment (CSA)
NIST SP 800-53A Rev.5, Assessing Security and Privacy Controls in Federal Information Systems and Organizations: Building Effective Assessment Plans	https://csrc.nist.gov/publications/sp800	C.3.4 IEP Security Services, Security Control Assessment and Contractor Security Assessments
NIST SP 800-57, Recommendation for Key Management- Part 1, 2 and 3	https://csrc.nist.gov/publications/sp800	C.3.4.12.1 Protecting Taxpayer Data
NIST SP 800-92, Guide to Computer Security Log Management	https://csrc.nist.gov/publications/sp800	C.3.4.6 Security Audit
NIST SP 800-115, Technical Guide to Information Security Testing and Assessment	https://csrc.nist.gov/publications/sp800	C.3.4.7 Incident Handling

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Title	How to Obtain	PWS Reference Para.
NIST SP 800-122, Guide to Protecting the Confidentiality of Personally Identifiable Information (PII)	https://csrc.nist.gov/publications/sp800	C.3.4.12.1 Protecting Taxpayer Data
NIST SP 800-128, Guide for Security-Focused Configuration Management of Information Systems	https://csrc.nist.gov/publications/sp800	C.3.4.5 Security Configuration and Change Management
NIST SP 800-137 Information Security Continuous Monitoring (ISCM) for Federal Information Systems and Organizations	https://csrc.nist.gov/publications/sp800	C.3.4.1 Security Risk Management Framework
NIST SP 800-144, Guidelines on Security and Privacy in Public Cloud Computing	https://csrc.nist.gov/publications/sp800	C.3.4.12.1 Protecting Taxpayer Data
NIST 800-171 (Protecting Controlled Unclassified Information in Nonfederal Systems and Organizations).	https://csrc.nist.gov/publications/sp800	C.3.2.4.1 Continuous Monitoring
NIST United States Government Configuration Baseline (USGCB)	https://csrc.nist.gov/Projects/United-States-Government-Configuration-Baseline/USGCB-Content	C.3.4.5 Security Configuration and Change Management

Federal Information Processing Standards (FIPS) Publication (PUB):

Title	How to Obtain	PWS Reference Para.
FIPS PUB 199, *Standards for Security Categorization of Federal Information and Information Systems*	http://csrc.nist.gov/publications/fips/fips199/FIPS-PUB-199-final.pdf	C.3.4.8 Business Continuity
FIPS PUB 200, *Minimum Security Requirements for Federal Information and Information Systems*	http://csrc.nist.gov/publications/fips/fips200/FIPS-200-final-march.pdf	C.3.4.1 Security Risk Management Framework

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Other:

Title	How to Obtain	PWS Reference Para.
Information System Contingency Plan (ISCP) Table Top Exercise		C.3.4.8 Business Continuity
Code of Federal Regulations (CFR), Title 36, Part 1194, Appendix D	https://www.ecfr.gov/current/title-36/chapter-XI/part-1194/appendix-Appendix%20D%20to%20Part%201194	C.3.1.1 Program Management
Common Vulnerability and Exposure (CVE)	https://www.cve.org/	C.3.4.2 Patch and Vulnerability Management
US Department of Homeland Security (DHS) Cybersecurity & Infrastructure Security Agency (CISA), *Continuous Diagnostics and Mitigation (CDM) program*	https://www.cisa.gov/cdm	C.3.4.4.1 Continuous Monitoring
Earned Value Management Guide September 30, 2008	https://www.irs.gov/pub/irs-procure/tj-attachment13-evmguidev2.0.pdf	C.3.1.1 Program Management
Federal Acquisition Regulations System, Subpart 34.2 - Earned Value Management System	https://www.govinfo.gov/content/pkg/CFR-2011-title48-vol5/xml/CFR-2011-title48-vol5-part1034-subpart34-2.xml	C.3.1.1Program Management
Treasury Acquisition Bulletin 15-03 March 18, 2015	https://home.treasury.gov/system/files/281/Acquisition-Bulletin-%28AB%29-15-03.pdf	C.3.1.1Program Management
Treasury Department Security Manual, TDP 85-01	https://home.treasury.gov/about/general-information/orders-and-directives/numerical-index-of-treasury-directives	C.1.1 BACKGROUND