

Date of Approval: 05/01/2025
Questionnaire Number: 2152

Basic Information/Executive Summary

What is the name of your project (system, database, pilot, product, survey, social media site, etc.)?

Robotic Process Automation Manual Refunds Verification & Monitoring

Acronym:

RPA Manual Refunds

Business Unit

Taxpayer Services

Preparer

For Official Use Only

Subject Matter Expert

For Official Use Only

Program Manager

For Official Use Only

Designated Executive Representative

For Official Use Only

Executive Sponsor

For Official Use Only

Executive Summary: Provide a clear and concise description of your project and how it will allow the IRS to achieve its mission.

The Robotic Process Automation (RPA) is owned by the Taxpayer Services Unit, and it supports the manual refunds process. It automates the day-to-day task of inputting and verifying thousands of manual refunds totals, a process previously performed manually by hundreds of employees across multiple campuses. The RPA is attended and run by tax analysts from their local machines. It operates within the internal systems such as Integrated Data Retrieval System (IDRS) and Integrated Automation Technologies - Erroneous Manual Refund Tool (IAT - EMT) that are used for manual refund processing. The RPA was implemented to reduce manual effort, increase accuracy, and support the broader initiative to streamline taxpayer services. The process uses taxpayers' personal and employment information (Personal Identifiable Information/Sensitive But Unclassified) to ensure accurate refund validation. Only authorized users

operating the bot have access to this data, which is securely stored in the local Manual Refunds Automation shared drive.

Personally Identifiable Information (PII)

Will this project use, collect, receive, display, store, maintain, or disseminate any type of Sensitive but Unclassified (SBU), Personally Identifiable Information (PII), or Federal Tax Information (FTI)?

Yes

Please explain in detail how this project uses sensitive data from inception to destruction (data lifecycle).

The business uses SBU/PII data as it is required data to process manual refunds. Once this data is collected from the taxpayers, it is ingested into the Erroneous Manual Refund Tool (EMT - Case Monitor) to validate errors on manual refunds to ensure overpaid accounts receive their proper refund. Output case files (active and archive) that contain SBU/PII data will get generated after monitoring is complete in EMT. Data in the EMT will stay in the active case file until it is archived. Once archived, the data automatically falls out of the EMT at 90 days. There will no longer be a record of it after that 90-day period.

Please select all types of Sensitive but Unclassified data (SBU)/Personally Identifiable Information (PII)/Federal Tax Information (FTI) that this project uses.

Address

Centralized Authorization File (CAF)

Employer Identification Number

Federal Tax Information (FTI)

Financial Account Number

Individual Taxpayer Identification Number (ITIN)

Name

Standard Employee Identifier (SEID)

Telephone Numbers

Cite the authority for collecting SBU/PII/FTI (including SSN if relevant).

PII for federal tax administration - generally IRC Sections 6001 6011 or 6012

PII for personnel administration - 5 USC

SSN for personnel administration IRS employees - 5 USC and Executive Order 9397

SSN for tax returns and return information - IRC section 6109

Product Information (Questions)

1 Is this PCLIA a result of the Inflation Reduction Act (IRA)?

Yes

1.1 What is the IRA Initiative Number?

1.2

2 Describe in detail, the Robotic Process Automation (RPA) process; be sure to identify the project title and business unit owner; state what IRS Strategy or initiative it supports; identify the system or process it supports and if PII will be required for the RPA to run; identify activities and workflow controls with the type and capabilities that will be incorporated; lastly indicate how the service benefits from the use of this RPA. (Process, Library, Test Automation, Template.)

Project title: Manual Refunds Verification and Monitoring. Business unit: Taxpayer Services. IRS Initiative: Objective 1 initiative number 1.2. Process details: The Robotics Process Automation will replace most of the human interactions required to monitor and verify refund cases via Integrated Automation Technologies (IAT) - Erroneous Manual Refund Tool (EMT). Business users will log into InfoConnect and launch IDRS and IAT - EMT to kick off the automation process. The attended bot will import previously monitored case file and new active case file for today from the shared drive into IAT - EMT. Once all the case files are loaded, the bot will initiate the monitoring and verification process for the refunds within the IAT - EMT by comparing with the information in IDRS. Once the monitoring and verification process is complete, the bot will trigger IAT - EMT to generate two reports: 1. EMT Run Report, which contains all the cases with 840s, and any discrepancy found during the verification process on the monitored active cases. 2: Archive Case Report: which lists out all the archive cases past 90 days that need to be closed out in IDRS. Once the reports have been generated, the bot will send both reports to headquarters for review. Business users will be responsible for correcting mismatches found on the EMT Run Report. The bot will export the newly generated active case file on the monitored cases by the IAT - EMT to the shared drive. The bot will send the Archive Case Report to headquarters so archive cases that are past 90 days can be manually closed out by users via IDRS. The automation will be able to save approximately 105,000 hours per year across 300 FTEs and reduce human errors and duplicated refunds. More importantly, it will improve quality output and protect revenue for the business.

3 Is this a new Robotic Process Automation (RPA) project?

No

3.1 Is there a PCLIA for this project?

Yes

3.11 What is the questionnaire number of the most recent approved PCLIA?
6958

3.12 What is the questionnaire title of the most recent approved PCLIA?
Robotic Process Automation - WI Manual Refunds Verification and Monitoring

4 Identify the IRS IT systems, applications, projects, and/or databases this RPA is applied to; include the associated system name.
Integrated Data Retrieval System (IDRS)

5 Identify why the use of SBU/PII/FTI is required; include any type of Sensitive But Unclassified (SBU), Personally Identifiable Information (PII), or Federal Tax Information (FTI) that this project will create, collect, receive, use, process, maintain, access, inspect, display, store, disclose, disseminate, or dispose of.

The business needs SBU/PII data as they are required data to process manual refunds. The SBU/PII collected in this system is used in the Internal Revenue Service (IRS) tax administration initiatives and strategies to validate errors on manual refunds, and ensure overpaid accounts receive their proper refund. The SSNs are used to monitor tax accounts to ensure duplicate refunds are not issued and if a duplicate refund is identified, ensure erroneous refund procedures are completed.

6 Is your RPA Attended/Unattended?
Attended

7 Is this RPA process converting from paper to electronic format or automating a process currently performed by a human?
Yes

7.1 Explain the process being replaced/automated.

The Robotics Process Automation will replace most of the human interactions required to monitor and verify refund cases via Integrated Automation Technologies (IAT) - Erroneous Manual Refund Tool (EMT). Business users will log into InfoConnect and launch IDRS and IAT - EMT to kick off the automation process. The attended bot will import previously monitored case file and new active case file for today from the shared drive into IAT - EMT. Once all the case files are loaded, the bot will initiate the monitoring and verification process for the refunds within the IAT - EMT by comparing with the information in IDRS. Once the monitoring and verification process is complete, the bot will trigger IAT - EMT to generate two reports: 1. EMT Run Report, which contains all the cases with 840s, and any discrepancy found during the verification process on the monitored active cases. 2: Archive Case Report: which lists out all the archive cases past 90 days that need to be closed out in IDRS. Once the reports have been generated, the bot will send both reports to headquarters for review. Business

users will be responsible for correcting mismatches found on the EMT Run Report. The bot will export the newly generated active case file on the monitored cases by the IAT - EMT to the shared drive. The bot will send the Archive Case Report to headquarters so archive cases that are past 90 days can be manually closed out by users via IDRS.

8 Indicate what level of complexity the RPA is classified as and if you were required to register with One Solution Delivery Lifecycle (OneSDLC) or not or indicate if Information Technology's (ITs) Technical Insertion process was used for approval of this RPA.

High complexity. We were required to register with OneSDLC.

9 Will connections or interdependencies be established for this RPA?

Yes

9.1 Will the connection be encrypted?

Yes

9.2 Will authentication/credentials be required?

Yes

9.3 Please provide details for the connection/interdependency. Indicate if this occurs on the backend versus through the system/user interface.

User will log into InfoConnect and launch IDRS and IAT-EMT to kick off the automation process. The automation will initiate the monitoring and verification process for the refunds within the IAT-EMT by querying refund information in IDRS.

10 Indicate who has or will have permission to access the data and how users are authenticated.

IRS employees: Users (read and write access), Managers (read only access), Systems Admin (admin access), Developers (admin access). Contractor employees: all contractor users, managers, systems admin, and developers have admin level access and moderate level of background investigations were performed on all contractor employees. The employees go through the authentication process by requesting access to IAT (and IAT sub-tools) by submitting a Business Entitlement Access Request System (BEARS) which must be approved by their manager.

11 Indicate if Business Entitlement Access Request System (BEARS) entitlements are required for access and if Privileged User Management Access System (PUMAS) control management is applied for granting access to the system(s)? If BEARS/PUMAS are not applied, indicate what access controls are in place.

BEARS entitlement for IDRS system: PROD USER MEG EITCRA (EITCRA GENERALIZED IDRS INTERFACE - MEG)

12 Identify the maintenance tasks or updates performed; state whether or not the maintenance tasks are inherited from the host (UiPath Platform), or you are using customized maintenance activities.

UiPath Platform

13 Indicate if this product or system shares data outside of the United States or its territories.

No

14 Indicate if this system or Robotic Process Automation (RPA) is trained through the use of algorithms; indicate if the algorithm used contains data with a sensitivity classification. (Sensitive but unclassified data might include algorithms, methods, system data, or PII/FTI that could be used to re-identify a person.)

No, the RPA is not trained through the use of algorithms.

15 Describe this system's (RPAs) audit trail process in detail; include location of supporting documents (SPLUNK). Note: Upload of this document is required.

System's audit trail can be found on manual refunds and posting of the tax information on IDRS/master file. Automation execution logs are stored within UiPath and can be retrieved from the user's local UiPath log folder.

Interfaces

Interface Type

Forms

Agency Name

U.S. Income Tax Return for Cooperative Associations

Incoming/Outgoing

Incoming (Receiving)

Transfer Method

Mail

Interface Type

IRS Systems, file, or database

Agency Name

Integrated Data Retrieval System (IDRS)

Incoming/Outgoing

Incoming (Receiving)

Transfer Method

Other

Other Transfer Method

Electronically transmitted via command codes

Interface Type

Forms

Agency Name

Information and Initial Excise Tax Return for Black Lung Benefit

Trusts and Certain Related Persons

Incoming/Outgoing

Incoming (Receiving)

Transfer Method

Mail

Interface Type

Forms

Agency Name

Employer's Annual Federal Tax Return

Incoming/Outgoing

Incoming (Receiving)

Transfer Method

Mail

Interface Type

Forms

Agency Name

Federal Self-Employment Contribution Statement for Residents of

Puerto Rico

Incoming/Outgoing

Incoming (Receiving)

Transfer Method

Mail

Interface Type

Forms

Agency Name

Application for Tentative Refund

Incoming/Outgoing

Incoming (Receiving)

Transfer Method

Mail

Interface Type

Forms

Agency Name

Form 3753 Manual Refund Posting Voucher

Incoming/Outgoing

Outgoing (Sending)

Transfer Method
Mail

Interface Type

Forms

Agency Name

U.S. Income Tax Return for Real Estate Investment Trusts

Incoming/Outgoing

Incoming (Receiving)

Transfer Method

Mail

Interface Type

Forms

Agency Name

U.S. Income Tax Return for an S Corporation

Incoming/Outgoing

Incoming (Receiving)

Transfer Method

Mail

Interface Type

IRS Systems, file, or database

Agency Name

Integrated Automation Technologies

Incoming/Outgoing

Both

Transfer Method

Integrated Enterprise Portal (IEP)

Interface Type

Forms

Agency Name

U.S. Departing Alien Income Tax Return

Incoming/Outgoing

Incoming (Receiving)

Transfer Method

Mail

Interface Type

Forms

Agency Name

Application for Withholding Certificate for Dispositions by
Foreign Persons of U.S. Real Property In

Incoming/Outgoing
 Incoming (Receiving)
Transfer Method
 Mail

Interface Type

 Forms
Agency Name
 U.S. Nonresident Alien Income Tax Return
Incoming/Outgoing
 Incoming (Receiving)
Transfer Method
 Mail

Interface Type

 Forms
Agency Name
 U.S. Income Tax Return for Regulated Investment Companies
Incoming/Outgoing
 Incoming (Receiving)
Transfer Method
 Mail

Interface Type

 Forms
Agency Name
 United States Gift Tax Return
Incoming/Outgoing
 Incoming (Receiving)
Transfer Method
 Mail

Interface Type

 Forms
Agency Name
 Employer's Annual Federal Unemployment (FUTA) Tax Return
Incoming/Outgoing
 Incoming (Receiving)
Transfer Method
 Mail

Interface Type

 Forms
Agency Name
 Statement of Person Claiming Refund Due a Deceased Taxpayer

Incoming/Outgoing
 Incoming (Receiving)
Transfer Method
 Mail

Interface Type

 Forms
Agency Name
 Quarterly Federal Excise Tax Return
Incoming/Outgoing
 Incoming (Receiving)
Transfer Method
 Mail

Interface Type

 Forms
Agency Name
 Form 5792 Request for Integrated Data Retrieval System (IDRS)
 Generated Refund
Incoming/Outgoing
 Outgoing (Sending)
Transfer Method
 Mail

Interface Type

 Forms
Agency Name
 U.S. Property and Casualty Insurance Company Income Tax
 Return
Incoming/Outgoing
 Incoming (Receiving)
Transfer Method
 Mail

Interface Type

 Forms
Agency Name
 Estimated Tax for Corporations
Incoming/Outgoing
 Incoming (Receiving)
Transfer Method
 Mail

Interface Type

Forms

Agency Name

Amended U.S. Corporation Income Tax Return

Incoming/Outgoing

Incoming (Receiving)

Transfer Method

Mail

Interface Type

Forms

Agency Name

U.S. Income Tax Return of a Foreign Corporation

Incoming/Outgoing

Incoming (Receiving)

Transfer Method

Mail

Interface Type

Forms

Agency Name

Claim for Refund of Excise Taxes

Incoming/Outgoing

Incoming (Receiving)

Transfer Method

Mail

Interface Type

Forms

Agency Name

Corporation Application for Tentative Refund

Incoming/Outgoing

Incoming (Receiving)

Transfer Method

Mail

Interface Type

Forms

Agency Name

Direct Deposit of Tax Return of \$1 Million or More

Incoming/Outgoing

Incoming (Receiving)

Transfer Method

Mail

Interface Type

Forms

Agency Name

Injured Spouse Allocation

Incoming/Outgoing

Incoming (Receiving)

Transfer Method

Mail

Interface Type

Forms

Agency Name

Employer's Quarterly Federal Tax Return

Incoming/Outgoing

Incoming (Receiving)

Transfer Method

Mail

Interface Type

Forms

Agency Name

Request for Taxpayer Advocate Service Assistance

Incoming/Outgoing

Incoming (Receiving)

Transfer Method

Mail

Interface Type

Forms

Agency Name

Return of Organization Exempt from Income Tax

Incoming/Outgoing

Incoming (Receiving)

Transfer Method

Mail

Interface Type

Forms

Agency Name

Employer's Annual Federal Tax Return for Agricultural Employees

Incoming/Outgoing

Incoming (Receiving)

Transfer Method

Mail

Interface Type

Forms

Agency Name

Adjusted Employer's Quarterly Federal Tax Return or Claim for
Refund

Incoming/Outgoing

Incoming (Receiving)

Transfer Method

Mail

Interface Type

Forms

Agency Name

U.S. Tax Return for Seniors

Incoming/Outgoing

Incoming (Receiving)

Transfer Method

Mail

Interface Type

Forms

Agency Name

Heavy Highway Vehicle Use Tax Return

Incoming/Outgoing

Incoming (Receiving)

Transfer Method

Mail

Interface Type

Other Federal Agencies

Agency Name

Business Fiscal Services

Incoming/Outgoing

Incoming (Receiving)

Transfer Method

Other

Other Transfer Method

Electronically transmitted via command codes.

Interface Type

Forms

Agency Name

Statement of Withholding on Dispositions by Foreign Persons of
U.S. Real Property Interests

Incoming/Outgoing
 Incoming (Receiving)
Transfer Method
 Mail

Interface Type

 Forms
Agency Name
 Claim for Refund and Request for Abatement
Incoming/Outgoing
 Incoming (Receiving)
Transfer Method
 Mail

Interface Type

 Forms
Agency Name
 Monthly Tax Return for Wagers
Incoming/Outgoing
 Incoming (Receiving)
Transfer Method
 Mail

Interface Type

 Forms
Agency Name
 U.S. Withholding Tax Return for Dispositions by Foreign Persons
 of U.S. Real Property Interests
Incoming/Outgoing
 Incoming (Receiving)
Transfer Method
 Mail

Interface Type

 Forms
Agency Name
 U.S. Income Tax Return for Certain Political Organizations
Incoming/Outgoing
 Incoming (Receiving)
Transfer Method
 Mail

Interface Type

 Forms

Agency Name
U.S. Income Tax Return for Homeowners Associations
Incoming/Outgoing
Incoming (Receiving)
Transfer Method
Mail

Interface Type

Forms
Agency Name
Annual Return of Withheld Federal Income Tax
Incoming/Outgoing
Incoming (Receiving)
Transfer Method
Mail

Interface Type

Forms
Agency Name
Adjusted Employer's Annual Federal Tax Return or Claim for
Refund
Incoming/Outgoing
Incoming (Receiving)
Transfer Method
Mail

Interface Type

Forms
Agency Name
Adjusted Employer's Annual Federal Tax Return for Agricultural
Employees or Claim for Refund
Incoming/Outgoing
Incoming (Receiving)
Transfer Method
Mail

Interface Type

Forms
Agency Name
Short Form Return of Organization Exempt from Income Tax
Incoming/Outgoing
Incoming (Receiving)
Transfer Method
Mail

Interface Type

Forms

Agency Name

Return of Private Foundation or Section 4947(a)(1) Trust Treated
as Private Foundation

Incoming/Outgoing

Incoming (Receiving)

Transfer Method

Mail

Interface Type

Forms

Agency Name

Amended Return or Administrative Adjustment Request

Incoming/Outgoing

Incoming (Receiving)

Transfer Method

Mail

Interface Type

Forms

Agency Name

U.S. Life Insurance Company Income Tax Return

Incoming/Outgoing

Incoming (Receiving)

Transfer Method

Mail

Interface Type

Forms

Agency Name

Exempt Organization Business Income Tax Return

Incoming/Outgoing

Incoming (Receiving)

Transfer Method

Mail

Interface Type

Forms

Agency Name

U.S. Income Tax Return for Estates and Trusts

Incoming/Outgoing

Incoming (Receiving)

Transfer Method

Mail

Interface Type

Forms

Agency Name

U.S. Income Tax Return for Settlement Funds

Incoming/Outgoing

Incoming (Receiving)

Transfer Method

Mail

Interface Type

Forms

Agency Name

U.S. Return of Partnership Income

Incoming/Outgoing

Incoming (Receiving)

Transfer Method

Mail

Interface Type

Forms

Agency Name

Annual Withholding Tax Return for U.S. Source Income of
Foreign Persons

Incoming/Outgoing

Incoming (Receiving)

Transfer Method

Mail

Interface Type

Forms

Agency Name

Report of a Sale of Exchange of Certain Partnership Interests

Incoming/Outgoing

Incoming (Receiving)

Transfer Method

Mail

Interface Type

Forms

Agency Name

U.S. Individual Income Tax Return

Incoming/Outgoing

Incoming (Receiving)

Transfer Method
Mail

Interface Type

Forms

Agency Name

U.S. Income Tax Return of a Foreign Sales Corporation

Incoming/Outgoing

Incoming (Receiving)

Transfer Method

Mail

Interface Type

Forms

Agency Name

U.S. Self-Employment Tax Return

Incoming/Outgoing

Incoming (Receiving)

Transfer Method

Mail

Interface Type

Forms

Agency Name

Amended U.S. Individual Income Tax Return

Incoming/Outgoing

Incoming (Receiving)

Transfer Method

Mail

Interface Type

Forms

Agency Name

U.S. Corporation Income Tax Return

Incoming/Outgoing

Incoming (Receiving)

Transfer Method

Mail

Interface Type

Forms

Agency Name

United States Estate Tax Return

Incoming/Outgoing

Incoming (Receiving)

Transfer Method
Mail

Systems of Records Notices (SORNs)

SORN Number & Name

IRS 36.003 - General Personnel and Payroll Records

Describe the IRS use and relevance of this SORN.

The use of this SORN is the system monitors records related to IRS employees' personal and employment information for the purpose of generating manual refunds. The relevance of this SORN lies in its compliance with the Privacy Act's requirements. By publishing this notice, the IRS informs the public about the types of personal data it collects, the purposes for which the data is used, and the safeguards in place to protect the information.

SORN Number & Name

IRS 34.037 - Audit Trail and Security Records

Describe the IRS use and relevance of this SORN.

The use of this SORN is for IRS to monitor access and activity. It also enforces user accountability by keeping logs of user activity, the IRS ensures that employees and contractors are held accountable for how they handle sensitive tax information. The relevance of this SORN is that it supports IRS efforts to safeguard taxpayer data by maintaining logs that help prevent, detect, and respond to unauthorized access or cyber threats.

SORN Number & Name

IRS 24.046 - Customer Account Data Engine Business Master File

Describe the IRS use and relevance of this SORN.

The business monitors business master file for manual refunds purposes and have a limited group of users using the automation so access to the information is tightly controlled.

SORN Number & Name

IRS 24.030 - Customer Account Data Engine Individual Master File

Describe the IRS use and relevance of this SORN.

The business monitors individual master file for manual refunds purposes and have a limited group of users using the automation so access to the information is tightly controlled.

Records Retention

What is the Record Schedule System?

Record Control Schedule (RCS)

What is the retention series title?

RCS 29 Tax Administration-Taxpayer Services

What is the GRS/RCS Item Number?

8

What type of Records is this for?

Both (Paper and Electronic)

Please provide a brief description of the chosen GRS or RCS item.

RCS 29 covers records created and/or maintained by IRS

Submissions Processing Campuses in carrying out their functions pertaining to: revenue collecting and accounting; processing, analysis and disposition of tax returns, tax information documents and related records; mailing of tax forms; transcription of statistical information; and preparation of special reports. Item 8 pertains to the retention and disposal of narrative and statistical reports. These reports are generated to provide insights into various aspects of IRS operations.

What is the disposition schedule?

Item 8: Narrative and Statistical Reports. Recurring narrative, statistical, progress, production reports and Run No. GUF 83-40, Deleted Database Records (not covered elsewhere in this schedule). (1) Record Copy. AUTHORIZED DISPOSITION Destroy after 1 year. (2) All other copies. AUTHORIZED DISPOSITION Destroy when no longer needed in current operations.

What is the Record Schedule System?

Record Control Schedule (RCS)

What is the retention series title?

RCS 29 Tax Administration-Taxpayer Services

What is the GRS/RCS Item Number?

183

What type of Records is this for?

Both (Paper and Electronic)

Please provide a brief description of the chosen GRS or RCS item.

RCS 29 covers records created and/or maintained by IRS

Submissions Processing Campuses in carrying out their functions pertaining to: revenue collecting and accounting; processing, analysis and disposition of tax returns, tax information documents and related records; mailing of tax forms; transcription of statistical information; and preparation of special reports. Item 183 pertains to the retention and disposal of transcripts of accounts.

These transcripts, which include both tax account and tax return information, are vital for various IRS functions, including audits, appeals, and taxpayer assistance.

What is the disposition schedule?

Item 183: Transcripts of Accounts requests and related documents. (Job No. N1-58-94-4) AUTHORIZED DISPOSITION Destroy 5 years after end of processing year, or when no longer needed in current operations, whichever is sooner.

Data Locations

What type of site is this?

System

What is the name of the System?

Integrated Automation Technologies - Erroneous Manual Refund Tool (IAT-EMT)

What is the sensitivity of the System?

Personally Identifiable Information (PII) including Linkable Data

Please provide a brief description of the System.

The purpose of Erroneous Manual Refund Tool (EMT) is to monitor accounts on integrated Data Retrieval System (IDRS) for specific conditions that could cause a potential erroneous refund.

What are the incoming connections to this System?

The automation will import input files from a shared drive into Integrated Automation Technologies - Erroneous Manual Refund Tool (IAT-EMT).

What are the outgoing connections from this System?

Once all the input files are loaded, the automation will initiate the monitoring and verification and process for the refunds within Integrated Automation Technologies - Erroneous Manual Refund Tool (IAT-EMT) by querying data in Integrated Data Retrieval System (IDRS). Once that's done, the automation will generate two output reports and a new input file which will be saved in the shared drive.

What type of site is this?

Shared Drive

What is the name of the Shared Drive?

RPA - Manual Refunds Automation

What is the sensitivity of the Shared Drive?

Personally Identifiable Information (PII) including Linkable Data

What is the URL of the item, if applicable?

\\VPWSENTHRCMN49\Common\CAS\AM\PPM\IMFAdjstmnt\
RPA - Manual Refunds Automation

Please provide a brief description of the Shared Drive.

Location for storing of input and output case files.

What are the incoming connections to this Shared Drive?

The automation will pull the case files and load them into
Integrated Automation Technologies - Erroneous Manual Refund
Tool (IAT-EMT).

What are the outgoing connections from this Shared Drive?

The automation will generate new output case file and saves it in the
shared drive folder after the monitoring is complete.