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*"Rummaging in the government's attic"*

Description of document: Internal Revenue Service (IRS) employee only Intranet home page for the Taxpayer Advocate Service (TAS) internal website and related pages for memoranda, delegation orders, policies, procedures, and training materials, 2017

Requested date: 17-February-2017

Released date: 16-March-2017

Posted date: 24-April-2017

Source of document: IRS FOIA Request  
HQ FOIA  
Stop 211  
PO Box 621506  
Atlanta, GA 30362-3006  
Fax: 877-807-9215

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PRIVACY, GOVERNMENTAL  
LIAISON AND DISCLOSURE

DEPARTMENT OF THE TREASURY  
INTERNAL REVENUE SERVICE  
WASHINGTON, DC 20224

March 16, 2017

This is my final response to your Freedom of Information Act (FOIA) request dated February 17, 2017 that we received on February 27, 2017.

You asked for a copy of the home page for the Taxpayer Advocate Service internal website and related pages for memoranda, delegation orders, policies, procedures, and training materials. I am enclosing a copy of the requested records consisting of five pages. This is a full grant of your request.

The FOIA provides for copying and search fees. Copying fees do not apply, since less than 100 pages are being provided. The fee for search time is \$20.50. Search fees are \$41.00 per hour after an allowance of two hours at no charge.

Please send your check or money order in the amount of \$20.50 payable to the Treasury of the United States to the address provided on the enclosed payment stub. We must receive your payment and the payment stub within 35 days of the date of this letter. Fees paid are reimbursement for services performed and are not refundable. If you fail to pay the fees, your name will be added to the FOIA non-payment list, and future requests will not be processed until all fees are paid in full.

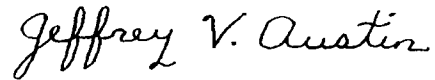
You may contact me the FOIA Public Liaison, Jeffrey V. Austin, to discuss your request at:

600 Arch Street, Room 7214, Philadelphia, PA 19106  
(267) 941-6424

The FOIA Public Liaison responds to FOIA and Privacy Act requests for copies of documents maintained by the IRS. There is no provision in either Act to resolve tax, collection, or processing issues and our staff is not trained to answer questions regarding those issues. If you need assistance with tax related issues you may call the IRS toll free number at 1-800-829-1040.

If you have any questions, please call Government Information Specialist Aaron Edelman, ID # 1001393988, at (267) 941-6315 or write to: Internal Revenue Service, Disclosure Office #2, P.O. Box 621506, Stop 211, Atlanta, GA 30362-3006. Please refer to case number F17058-0048.

Sincerely,

A handwritten signature in black ink that reads "Jeffrey V. Austin". The signature is written in a cursive style with a large, stylized 'J' and 'A'.

Jeffrey V. Austin  
Disclosure Manager  
Disclosure Office 2

Enclosures

TAS Directory
About TAS
NTA Communiqués and Reports
Policy/Procedures/Guidance
Training & Employee Development
EEO & Diversity
Business Results
Communications & Outreach
Technology & Systems
Research Studies
Forms/Pubs/Docs/Letters
TAS Departments
Emergency Preparedness

## Most Read Articles

1. [Learn how TAS can help you help taxpayers](#)  
Nov. 13, 2015
2. [Centra is now Saba Meeting](#)  
Oct. 29, 2015
3. [330 Processing Amended Returns](#)  
Nov. 10, 2014
4. [TAS employees celebrate the spirit of giving through the 2016 Combined Federal Campaign](#)  
March 1, 2017
5. [315 Unpostable/Rejected Return or Adjustment](#)  
July 15, 2014

## IRWeb &gt; Taxpayer Advocate Service

## TAS News Center



YOUR VOICE AT THE IRS

- ▶ [Bring Your Own Device \(BYOD\) Program for Bargaining Unit \(BU\) Employees](#) [3/2]  
The BYOD program will now offer Bargaining Unit Employees the opportunity to simplify the way they work.
- ▶ [The San Jose office showed its spirit as part of EITC Awareness day](#) [3/2]  
Learn how San Jose helped taxpayers.
- ▶ [Kristine Lafortune is the new LTA for the Andover TAS office](#) [2/16]  
Kristine began her IRS career in 1986 and joined TAS in 2007.
- ▶ [Find answers to elevated questions and concerns on the DNIA's SharePoint site](#) [2/23]  
Access the Answers to Your Questions site for responses to your questions and concerns.

## TAS Employee Portal

- ▶ [Welcome Screen](#)
- ▶ [Case Advocacy Tools](#)
- ▶ [Systemic Advocacy Tools](#)
- ▶ [Support Staff Tools](#)
- ▶ [Management Tools](#)
- ▶ [Analytical Tools](#)
- ▶ [Multilingual Tools](#)

## TAS Favorites

- ▶ [Question Resolution Information System \(QRIS\) Library](#)
- ▶ [Case Assistance by Issue Code](#)
- ▶ [SLA-Service Level Agreements](#)
- ▶ [Campus Requirements and Routing Guide](#)
- ▶ [Taxpayer Assistance Orders](#)
- ▶ [SAMS](#)
- ▶ [Interim Guidance Memoranda](#)
- ▶ [TAS SharePoint Home](#)
- ▶ [lynda.com](#)
- ▶ [SB/SE Counsel](#)

## TAS Newsletters

- ▶ [Welcome Screen Articles](#)
- ▶ [Wednesday Weekly Archives](#)
- ▶ [Manager's Forum Archives](#)
- ▶ [Special Editions Archives](#)
- ▶ [Communications Assistance Request](#)

## Hot Topics

- ▶ [2017 Objectives Report to Congress](#)
- ▶ [Welcome Screen Self-Install Script](#)
- ▶ [Affordable Care Act](#)
- ▶ [Taxpayer Bill of Rights](#)
- ▶ [Got Questions About TAS Issues?](#)
- ▶ [Welcome to TASI for new employees \(.pdf\)](#)
- ▶ [Windows 7/Office 2010 Resources](#)
- ▶ [2017 TAS Program Letter](#)
- ▶ [Mandatory Password Reset FAQ](#)
- ▶ [How to Find Information on the TAS Website \(video\)](#)

## TAS Talk

[Susan E. Brown has been approved as a leave transfer recipient](#)  
March 3, 2017

[TAS welcomes Terri Polvino as the new Local Taxpayer Advocate in Portsmouth, New Hampshire](#)  
March 2, 2017

[Read all TAS Talk](#)

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# TAS/NTEU Agreements, Letters and Memorandums of Understanding

Letters/Memorandums of Understanding	Text Version	Scanned Version	Date
Pilot of the Taxpayer Digital Communication (TDC) Tool in TAS	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	October 27, 2016
Change in Intake - Including CCI	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	May 16, 2016
TAS Welcome Screen	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	January 12, 2015
TAS Welcome Letter Initiative Pilot Addendum	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	June 18, 2014
Update of TAS Transfer Guidelines to more broadly distribute cases with EO Determination Issues	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	December 2, 2013
TAS Case Review Form 13095 Redesign	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	October 31, 2013
TAS IRM 13.1.7	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	October 28, 2013
Congressional Office Inquiries to be expanded to TAS Campuses	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	September 27, 2013
Welcome Letter Initiative Pilot	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	April 29, 2013
Toll Free Intake Line Proof of Concept	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	April 18, 2013
Systemic Advocacy Realignment	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	April 17, 2013
Grant Solutions	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	March 19, 2013
Contact Recording	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	March 8, 2013
Mandatory Use of IAT Refund Suite of Tools and EM Refund Tool	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	January 16, 2013
Update of TAS Transfer Guidelines to more broadly distribute cases with Earned Income Credit (EIC) and Reject/Unpostable Issues ("TAS Transfer Guidelines") Initiative.	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	July 24, 2012
TAS Centralized AMS Code Routing Initiative	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	December 1, 2011
TAS Virtual Service Delivery Project (TAS VSD Project) Initiative	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	October 27, 2011
TAS Modernization e-File Return Request Display (RRD) and Automated Lien System (ALS) Initiative ("RRD/ALS")	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	August 24, 2011
Revision of IRM 13.1.10: Special Processes (IRM 13.1.10) Initiative	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	July 14, 2011
TAS Read/Only Print Access to the Correspondence Imaging System (CIS) Documents and Images through the Account Management Services (AMS) Application	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	March 24, 2011
TAS Implementation of N-WLB Pilot Procedures at all co-located Callsites except Campuses and Puerto Rico ("Inventory Balancing") initiative MOU	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	February 23, 2011
Transfer of TAS Identity Issue Casework to the Identity Protection Specialized Unit (IPSU)	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	December 9, 2010
TAS Online Retrieval System (ORS) MOU	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	November 3, 2010
TAS Treasury Check Information System (TCIS) Read Only/Print Access MOU	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	July 14, 2010
TAS Treasury Check Information System (TCIS) Read Only/Print Access MOU (Rollout Schedule) Attachment	<a href="#">Word Version</a>		July 14, 2010
AWS Pilot for TAS	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	November 19, 2009
IRM 13.1.12, TAS Case Procedures, Technical Advisors and the Virtual Team Process	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	October 14, 2009
TAS National Inventory Balancing Procedure Change	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	October 8, 2009
Quality Attributes MOU	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	July 30, 2009
Transition from Cleverpath Eureka Report Products to Business Objects	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	June 9, 2009
New Case Factors Screen will be added to TAMIS	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	June 3, 2009
Phase II of the TAMIS Time Reporting System	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	May 26, 2009
Revisions to IRM 13.2, Processing Advocacy Issues	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	May 6, 2009
TAS "Read Only" Access to RGS/CEAS - LOU	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	March 3, 2009
SAMS-SAMSII Significant Enhancement MOU	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	February 13, 2009
Reassignment of FSA Analysts MOU	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	January 12, 2009
Implementation of New Performance Plan/CJE	<a href="#">Word Version</a>		June 22, 2008
Phase I of the TAMIS Time Recording System	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	February 13, 2007
Austin Downtown and Campus Office Cons. Test	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	March 10, 2006
TAMIS Portal Reports LOU	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	September 16, 2005
Revised TAS Case Criteria LOU	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	May 6, 2005
TAS 4-Year Training Plan Implementation	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	September 29, 2004
Internal Revenue Manual (IRM), Part 13	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	September 22, 2004
Test of Area 5 Pre-Closing Check Sheet (QS#4)	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	August 19, 2004
Online Review Process for IDRS Actions	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	May 11, 2004
Implementation of TAS Case Review Form - LOU	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	March 22, 2004
Implementation of the TAS SAMS	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	November 14, 2003
Implementation of TAS ICP Program	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	November 14, 2003
Implementation of Toll-free Access to TAS Case Advocates	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	November 14, 2003
National Partnering Council	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	April 15, 2003
Implementation of New TAMIS	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	April 3, 2003
TAS Restructuring Agreement	<a href="#">Word Version</a>	<a href="#">PDF Version</a>	April 13, 2001

Delegat. Order	Authority	Delegated to:	Source of Authority	Redelegated to:
1-4	Settlement of Tort Claims - Determine claims for reimbursement of bank charges arising out of erroneous levies, etc.	NTA; DNTA; ATA	31 USC 3723; 28 USC 2672, 31 USC 3721	LTA; TAGM
1-5	Reimbursement for MI & E, Emergency Travel, and Temporary Relocation	NTA; DNTA; ATA	Treasury Directive 74-07; FPMR 101-7	LTA
1-7	Authorize or Approve Attendance at Meetings at Government Expense	NTA; DNTA	Treasury Order 150-10	ATA
1-10	Travel of Personnel Detailed to the IRS	NTA; DNTA; ATA	Federal Travel Regulations	None
1-21	Authorization to Grant Case by Case Exemptions to the Financial Conflict of Interest Provision in 18 USC Subsection 208(a)	NTA; DNTA; ATA	18 USC 208(b)(1), IRC 7804, and Treasury Order 102-01	None
1-30	Authority to Authorize or Approve Travel, Travel Advances, Transportation Services, and Approve Travel Vouchers	NTA; DNTA	Treasury Directive 74-07	First Level Supervisors
11-2	Authority to Permit Disclosure of Tax Information and Permit Testimony or the Production of Documents	Refer to Exhibit 1.2.2-2	Treasury Order 150-10; 101-05; General Counsel Order 4; IRC Section 6103	Refer to Exhibit 1.2.2-2
12	Designation of Acting Supervisory Officials	All Supervisory Officials	Treasury Order 102-01; Chapter 250, Human Resource Directorate Manual	None
19	Payment of Expenses Incident to Transfer or Appointments of Employees to New Official Stations	NTA; DNTA; ATA	Treasury Directive 74-07; Multiple	LTA in Alaska and Hawaii
39	Tours of Duty	NTA; DNTA; ATA	Treasury Order 102-01	First Level Supervisors
40	Credits and Refund Authority	NTA; LTA	26 CFR 301.6402-1	None
50	Withholding Compensation Due Personnel	NTA; DNTA	Treasury Department Fiscal Service Circular 871	ATA
81	Authority in Various Personnel Matters	Refer to Exhibit 1.2.2-1	Treasury Order 102-01; Chapters 451, 540 and 550.6	Refer to Exhibit 1.2.2-1
89	Administrative Control of Documents and Material	NTA; DNTA	Treasury Order 71-02	None
92	Procurement of Training Using Standard Form (SF)-182, Request, Authorization, Agreement, and Certification of Training	Various Supervisors	Policy and Procedures Memorandum 70.3	None
100	Furnishing Special Statistical Studies, Compilations, Return and Return Information, Training and Training Aides	NTA; DNTA; ATA	26 USC 6108	None
102	Delegation of Authority in Labor-Management Relations Matters	DSHR; NTA; DNTA	Treasury Personnel Management Manual	None
104	Absence and Charges to Leave	NTA; DNTA; ATA;	Treasury Order 102-01	First Level

## Authorities and Criteria

Interim Guidance Memoranda (IGM)

IMD/SPOC

Inventory Balancing

Letters and Memorandums of Understanding

Service Level Agreements

Case Processing

Suicide Threat

Affordable Care Act (ACA) Tax Provisions

EEO &amp; Diversity

IRMs

Strategic Plan

Training Policy/Guidance

Articles

[IRWeb](#) > [Taxpayer Advocate Service](#) > [Policy/Procedures/Guidance](#)**Policy/Procedures/Guidance****Fiscal Year 2017 Program Guidance****FY 2017 TAS Program Letter**

- [FY 2017 Operational Plan](#)
- [FY 2017 Advocacy Reviews](#)

**TAS Budget / Vision, Strategy & Finance****National Taxpayer Advocate Fiscal Year 2017 Objectives Report to Congress****Prior Year Guidance****Case Guidance**

- [Case Advocacy Tools](#)
- [Affordable Care Act \(ACA\) Tax Provisions](#)
- [Emerging Issues](#)
- [Case Processing Home Page](#)
- [Suicide Threat Resources](#)
- [IPSU MOU between TAS and W&I](#)
- [IRM 13.1 Training and other Mandatory Training](#)

**Program Guidance**

- [IRS Telework \(Flexiplace\) Program \(.pdf\)](#)
- [Signature Package Guidance for NTA & DNTA \(.doc\)](#)



tranet

Search:

[IRWeb](#) > [Taxpayer Advocate Service](#) > [Training & Employee Development](#)

## Training & Employee Development

Employee Support & Development (ESD) provides services to all TAS managers and employees on Training and Development. The Learning & Education (L&E) Project Managers provide development and delivery support to ensure TAS employees can perform the duties of their position.

### What's New

- ▶ [TAS Training Calendar](#)
- ▶ [Training & Career Development SharePoint site](#)

### Internal Links

- ▶ [TAS Training Resource Guide \(.pdf\)](#)
- ▶ [TAS Training Coordinators](#)
- ▶ [Record Learning in ELMS \(.pdf\)](#)
- ▶ [Filing Season & Beyond Hot Topics](#)

### External Links

- ▶ [Lynda.com](#)
- ▶ [ELMS](#)
- ▶ [Saba Meeting](#)
- ▶ [Learn and Lead 24x7](#)
- ▶ [IRM Online](#)
- ▶ [Publishing Services](#)

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