

INTERIM IRM PROCEDURAL UPDATE

DATE: 04/12/2012

NUMBER: WI-01-0412-0856

SUBJECT: Facilitated Self Assistance (FSA) and Field Assistance Telephone Script

AFFECTED IRM(s)/SUBSECTION(s): 1.4.11

CHANGE(s):

IRM 1.4.11.3.5 - Adds new procedures for Facilitated Self Assistance (FSA)

1. The Group Manager will communicate policies and procedures to all group employees regarding FSA.
2. The Group Manager will provide guidance to employees to ensure that FSA is used to the maximum extent possible. Employees should be familiar with IRS.gov and the tasks that can be accomplished via IRS.gov.
3. The Group Manager will ensure that an FA employee is available to facilitate. Refer to IRM 21.3.4.2.3, *Facilitated Self Assistance (FSA) for Facilitator duties*.
4. The Group Manager will ensure the FSA printer and computers are operational. If a problem arises, refer to the FSA Troubleshooting Guide http://win.web.irs.gov/field/FA_FSA.htm located on the W & I Field Assistance Insider home page. If the problem can not be resolved, the Group Manager will notify the designated FA HQ Analyst with the specific details including bar code(s) of the kiosk or printer if warranted.
5. The FSA kiosks and workstations should be clean and inviting (see Cleaning the Kiosk PowerPoint Slide http://win.web.irs.gov/field/FA_FSA.htm). Disinfectant wipes should be made available. Scratch paper and pen should also be available for taxpayer use.
6. The Group Manager or designee will report FSA units daily on their FAMIS. See the FAMIS Guide http://win.web.irs.gov/field/field_FAMIS.htm for additional details. FSA is not connected to Qmatic and units can be obtained from the Vendor's report.
7. Managers must take reasonable measures to ensure that the kiosk workstation placement provides a balance of taxpayer privacy and adequate physical security controls to prevent vandalism. The dedicated FSA printer will be kept in FA secure space, preferably the IAR workstation for easy retrieval of prints.
8. The Group Manager will ensure one-time use headphones are available, when requested by taxpayers opting to use the Alternative Technology option on the kiosks.

Exhibit 1.4.11-1 - Adds E-mail reply to Field Assistance Telephone Script

E-mail Reply to Taxpayer
It is not standard practice for the IRS to communicate with taxpayers or their representatives via e-mail. We may use e-mail on a limited basis to effectively communicate with the deaf or hard of hearing community. Please be advised that the IRS cannot guarantee the security of your e-mail if you choose to send information via e-mail. Do not include your social security number, taxpayer identification number, or any account information in your e-mail communications.
My name is _____ ID # _____.
Thank you for contacting the Internal Revenue Service office located at _____ (insert street address, city, state and zip code).
This e-mail is being sent to you based on the message you or your representative left on our telephone messaging line. We do not provide tax account services via the local telephone number or through e-mail communications.
Find the help you need on our website at www.IRS.gov . If you want to call us, for individual tax information call 1-800-829-1040, or for business taxes you may call 1-800-829-4933.
Telephone assistance for the deaf and hard of hearing is available for individuals with TTY equipment. The toll-free number for this service is 1-800-829-4059, and the hours of operation are M-F, 7:00a.m. - 7:00p.m. (callers local time); Alaska and Hawaii follow Pacific Time. Deaf and hard of hearing individuals that do not have this equipment may be able to obtain access through the federal or state relay services.
No appointment is necessary to speak with someone face-to-face in our office _____ (insert days) from _____ to _____ (insert hours).
NOTE: If the TAC is closed for lunch insert: Our office is closed for lunch from _____ to _____.
This mailbox was established solely for the deaf and hard of hearing taxpayers to schedule appointments and to request sign language interpreters. If you are deaf or hard of hearing or a representative for a deaf or hard of hearing taxpayer, please respond to this e-mail letting us know what type of appointment you need (return preparation, tax law assistance, account assistance). Let us know whether you need the IRS to provide a sign language interpreter and what dates and times you would be available for the

appointment.

Thank you for contacting the Internal Revenue Service.

E-mail reply to taxpayer once determined they do not meet Deaf and Hard of Hearing (D/HOH) criteria for further e-mail responses, as needed

It is not standard practice for the IRS to communicate with taxpayers or their representatives via e-mail. We may use e-mail on a limited basis to effectively communicate with the deaf or hard of hearing community. Please be advised that the IRS cannot guarantee the security of your e-mail if you choose to send information via e-mail. Do not include your social security number, taxpayer identification number, or any account information in your e-mail communications.

My name is _____ ID # _____.

Thank you for contacting the Internal Revenue Service office located at _____ (insert street address, city, state and zip code).

We are sorry, we do not provide tax account services via the local telephone number or through e-mail communications. This mailbox was established solely for the **deaf and hard of hearing taxpayers** to schedule appointments and to request sign language interpreters. Therefore we cannot provide a response to your e-mail communication.

Thank you for contacting the Internal Revenue Service.

NOTE: In addition to the Deaf and Hard of Hearing (D/HOH) e-mail scripts, you may add more information specific to the taxpayer's issue when needed.