INDEPENDENT OFFICE
OF APPEALS

DEPARTMENT OF THE TREASURY
INTERNAL REVENUE SERVICE
WASHINGTON, DC 20224

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Affected IRM: 8.27.1

MEMORANDUM FOR ALL IRS INDEPENDENT OFFICE OF APPEALS EMPLOYEES

FROM: Steven M. Martin */s/ Steven M. Martin*
Director, Operations Support

SUBJECT: Updated Interim Guidance on Appeals Case Management System (ACMS) procedure updates for IRM 8.27.1, Administrative Support, Case Processors

This guidance supersedes AP-08-1125-0045, Appeals Case Management System (ACMS) procedures updates for IRM 8.27.1, Administrative Support, Case Processors, serving as guidance to provide procedures in ACMS for Appeals' workstreams and updates to Shared Team of Administrative and Redaction Support (STARS) process improvements. Please distribute this information to all impacted employees within your organization.

Purpose: This guidance provides changes in terminology and new processing functionality for the IRS Independent Office of Appeals (Appeals) new case management system, ACMS.

Background/Source(s) of Authority: Appeals Centralized Database System (ACDS), Appeals' aging legacy system, is being replaced by ACMS, a more modernized system. Appeals contracted Salesforce to create ACMS, which will provide Appeals with a new level of automation and analytics. These updates will allow for more effective collaboration within Appeals and, in the future, with other IRS business units.

Procedural Change: Release 1 of ACMS focused on Collection Appeals work. Release 2 of ACMS will focus on Examination Appeals and Specialized Examination Programs and Referrals (SEPR) case work. Future releases will incorporate concepts introduced in this guidance and will be reinforced via training and applicable user guides. Procedural changes pertaining to this guidance are included in the attachment.

Additional Information: Additional information on ACMS can be found on the Appeals Exchange (ApEx) ACMS Home Page. This site contains links for helpful information with

ACMS, training documents, etc.

Effect on Other Documents: Portions of this guidance may be extended, modified, or made permanent, and incorporated into the affected IRM section(s) within two years from the date of this memorandum.

Effective Date: This guidance is effective as of the date of this memorandum.

Contact: Appeals employees should follow existing procedures to elevate questions through their management chain and follow established procedures on How to Contact an Analyst.

Attachment

cc:
FOIA Library
www.irs.gov

Attachment AP- AP-08-0726-0062, Appeals Case Management System (ACMS) procedure updates for IRM 8.27.1, Administrative Support, Case Processors

8.27.1.1.6 (MM-DD-YYYY)
Terms and Acronyms
Updated the table in paragraph (1)

(1) Added Appeals Case Management System (ACMS)

Appeals Case Management System	ACMS

8.27.1.3 (MM-DD-YYYY)
Scope of Work
Updated paragraph (1)

(1) Shared Team of Administrative and Redaction Support (STARS) uses a shared support model to provide administrative support to all of Appeals, with STARS personnel as a shared resource. Services offered by STARS are requested through the STARS SharePoint request portal site for cases in Appeals Centralized Database System (ACDS), while support requests are submitted through ACMS for those cases assigned and worked in ACMS. Once submitted, the requests are routed nationwide to facilitate timely processing. The scope of work includes both local and remote duties.

8.27.1.4 (MM-DD-YYYY)
Support Request
Updated paragraph (1)

(1) A support request is required for many services offered by STARS. A complete list of available services/support can be found in the Request Guide on the STARS SharePoint.

8.27.1.4.1 (MM-DD-YYYY)
Submitting a Support Request
Updated Paragraph (1) and moved information from numbered list to paragraph (2)

(1) For cases in ACMS, requests to STARS are submitted by the Appeals technical employee (ATE) as a support request within ACMS. For cases in ACDS, requests for services are submitted through the STARS SharePoint Request Portal site under: New Request.

(2) ATEs must complete the required fields, denoted with a red asterisk, and include any necessary attachments in ACMS/ACDS when submitting a support request.

> **Note:** For information on each request type, or to determine if additional information is required, see the Request Guide on the STARS SharePoint.

8.27.1.4.2 (MM-DD-YYYY)
Working a Support Request

Updated paragraphs (1) through (3) and (5)

(1) Support requests are reviewed by the administrative gatekeepers as they are received.

Note: Any support request missing required information will be assigned and returned to the requester, with the reason notated in the support request. The ATE can correct the missing information and resubmit the request.

(2) The administrative gatekeeper will assign the support request to the appropriate employee, based on the request type and internal procedures.

(3) In ACMS, the assigned employee will take the following steps normally within one business day once they are assigned a support request:

1. Access and review the support request.
2. Take appropriate steps to complete the request.

Note: The assigned employee will follow up on support requests that cannot be completed upon initial assignment.

(4) Support requests are worked in the order in which they are received. Most requests are completed within two business days; however, requests that require STARS to reach out to contacts outside of Appeals (e.g., statutory notice of deficiency, certified mailing list, report generation software) do not have predictable timeframes.

(5) Once the assigned employee has completed the support request, they must close the support request, which will systemically update the status to “awaiting approval.”

Reminder: All support requests must be reviewed prior to being marked complete.

8.27.1.4.3 (MM-DD-YYYY)
Closing a Support Request
Updated paragraphs (1) and (2)

(1) If the support request is accurate, the manager will approve the request, which changes the status from “awaiting approval” to “closed.”

(2) If the support request is inaccurate, or not ready to close, the manager will return the request to the STARS employee for additional work.

8.27.1.4.3.1 (MM-DD-YYYY)
Completed Support Request
Revised section

(1) Once the support request has been completed, the assigned STARS employee must

attach any requested documentation in the documents tab of the main appeal record, thoroughly document their work by creating an action record within the support request, and close the support request, which will systemically update the support request to the "awaiting approval" status.

Reminder: All support requests must be reviewed prior to being marked complete.

(2) Reviewers will monitor the STARS ACMS queue to identify any support request in "awaiting approval" status. The reviewer must review the support request and any documentation included, and confirm the appropriate actions were taken to complete the support requested.

(3) If the support request was not properly completed, the reviewer must return the support request to the employee. The assigned employee will receive a notification via the ACMS system.

(4) If the support request has been completed properly, the manager will approve the request, which changes the status from "awaiting approval" to "closed." Upon approval, the requester receives a system notification that the support request was completed.

8.27.1.4.3.2 (MM-DD-YYYY)
Close to the Requester
Updated title and paragraph (1)

(1) A support request will be assigned and closed to the requester with the reason notated in the support request when it is missing required information, or the support is not offered by STARS.

8.27.1.4.3.3 (MM-DD-YYYY)
Withdraw a Support Request
Updated paragraph (1)

(1) A support request can be recalled at any time by the requester using the recall button on the support request in ACMS. For support requests that cannot be recalled in ACMS, the requester can send an email to *AP Admin Support and include the support request number (SR-NNNNNN) being withdrawn.

Note: Once a support request has been completed, it cannot be withdrawn.