



INDEPENDENT OFFICE
OF APPEALS

DEPARTMENT OF THE TREASURY
INTERNAL REVENUE SERVICE
WASHINGTON, DC 20224

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MEMORANDUM FOR ALL IRS INDEPENDENT OFFICE OF APPEALS EMPLOYEES

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

SUBJECT: Appeals Case Management System (ACMS) General Guidance

This guidance provides general information about ACMS. Please distribute this information to all impacted employees within your organization.

Purpose: This guidance provides changes in terminology and general 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 will focus on Collection-sourced case work, while additional ACMS releases will incorporate the remaining workstreams. 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 Intranet page – Appeals Case Management System (ACMS). This site will contain links for helpful information with ACMS, training documents, etc.

Effect on Other Documents: This guidance may be incorporated into affected IRMs 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: www.irs.gov

ACMS Process Improvements:

Tracking of Issues

ACMS takes a modernized, efficient approach on how we identify, annotate, track, and resolve issues raised during the initial analysis and any additional issues raised during the conference. The Issue Tracker will provide a one stop source for all the issues raised allowing for an organized view. When working cases in ACMS, assigned employees will ensure all issues, including those raised in the protest, are captured in the Issue Tracker. Please refer to the ACMS webpage for training material and more specifics on issue tracking and the Issue Tracker.

Support Requests

Support requests on ACMS will replace traditional SharePoint requests for certain internal actions (e.g., Shared Team of Administrative and Redaction Support (STARS) redaction requests, Account and Processing Support (APS) Integrated Data Retrieval System (IDRS) update actions). The use of Support requests is mandatory and includes time entries. Support requests will also replace most situations where an additional work unit number (WUNO) was required (e.g., underlying liability raised under Collection Due Process (CDP)). Please refer to the ACMS webpage for training material and more details on Support requests.

Changes in Quality Review

ACMS has the built-in functionality to allow case assignment, review, and closures for Appeals Quality Measurement System (AQMS) purposes. AQMS reviews for cases on ACMS must be performed on ACMS, while cases on ACDS must continue to be reviewed on ACDS.

Changes in Terminology

ACMS will change some common terms used in ACDS. You must refer to the ACMS webpage for training material and more details on changes to terminology. Changes to some frequently used terms include:

- WUNO in ACDS is now Appeal Number in ACMS. Appeal Number is a unique number for each appeal, auto generated by ACMS.
- Taxpayer in ACDS is now Appeal Participant in ACMS. Any individual who is associated with an appeal is an Appeal Participant. This would include the primary taxpayer, along with a secondary taxpayer, Power of Attorney (POA), etc.
- Case Activity Record (CAR) in ACDS is now Case Action Record (CAR) in ACMS. The CAR is where the Appeals Officer will enter the case history.