



INDEPENDENT OFFICE
OF APPEALS

DEPARTMENT OF THE TREASURY
INTERNAL REVENUE SERVICE
WASHINGTON, DC 20224

November 25, 2025

Control No. AP-08-1125-0045
Expiration Date: 11/25/2027
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: Appeals Case Management System (ACMS) procedure updates
for IRM 8.27.1, Administrative Support, Case Processors

This guidance provides general information about ACMS detailed in IRM 8.27.1, Administrative Support, Case Processors. 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 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. **Note:** These procedures apply to cases worked under ACMS Release 1.

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: Portions of this guidance will be incorporated into affected manuals 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

Throughout 8.27.1 (Recommend this be a new IRM Chapter particular to ACMS process)

- Each item below applies to work migrated to ACMS
- For SNOD/CML 'Support Requests,' STARS will need to build a request in SharePoint until subsequent releases of ACMS
- References to Appeals Centralized Database System (ACDS) will be changed to Appeals Case Management System (ACMS)
- References to Case Activity Record to Case Action Record (CAR)
- References to Work Unit to Appeals Number

8.27.1.1.6 (MM-DD-YYYY)

Terms and Acronyms

(1) Add Appeals Case Management System (ACMS)

| | |
|--------------------------------|------|
| Appeals Case Management System | ACMS |
|--------------------------------|------|

8.27.1.3 (MM-DD-YYYY)

Scope of Work

(1) STARS uses a shared support model to provide administrative support to all of Appeals. STARS personnel are a shared resource. A 'Support Request' will be made through ACMS for cases assigned to ACMS under Release 1. A case that is not assigned to ACMS will continue to submit a support request through the STARS SP request portal site. Once submitted, the support requests are routed throughout the country to facilitate timely processing of the requests. The scope of work covers both local and remote duties.

8.27.1.4 (MM-DD-YYYY)

Support Request.

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

8.27.1.4.1 (MM-DD-YYYY)

Submitting a Support Request

Add the following:

- (1) For cases worked in ACMS: A 'Support Request' is made within ACMS using the new 'New Support Request' button.
- (2) For cases worked in ACDS: A support request will continue to be submitted through the STARS SP Request Portal site under: *New Request*.

8.27.1.4.2 (MM-DD-YYYY)

Working a Support Request

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

Note: For ACMS Release 1, any 'Support Request' missing required information will be assigned and closed to the requester with the reason in the closing remarks. A new support request will then need to be resubmitted with the missing information.

(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:'

a. Access and review the support request

b. 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) A 'Support Request' is 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 generated software) do not have predictable timeframes.

(5) Once the assigned employee has completed the 'Support Request', they must update the 'Support Request' to the 'awaiting approval' status.

Reminder: All 'Support Requests' must be reviewed prior to being marked complete.

8.27.1.4.3 (MM-DD-YYYY)

Closing a Support Request

(1) If the 'Support Request' is accurate, the manager will approve the request, which changes the status from 'awaiting approval' to 'completed.'

(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

Completed Support Request

(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 and thoroughly document their work by creating an action record within the 'Support Request.'

(2) The assigned STARS employee will update the 'Support Request' status to 'closed,' which updates the system to 'awaiting approval.'

(3) Reviewers will monitor the STARS ACMS queue to identify any 'Support Request' in 'awaiting approval' status that are assigned to their teams. The reviewer must review the 'Support Request' and any documentation included, and confirm the appropriate actions were taken to complete the support requested.

(4) 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.

(5) If the 'Support Request' has been completed properly, the manager will approve the request, which changes the status from 'awaiting approval' to 'completed.' Upon approval, the requestor receives a system notification that the 'Support Request' was completed.

8.27.1.4.3.2 (MM-DD-YYYY)

Close to the Requester

(1) A 'Support Request' will be assigned and closed to the requestor and marked as 'Completed' with the reason in the closing remarks 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

(1) A 'Support Request' can be withdrawn at any time by the requester. The requester can send an email to *AP Admin Support and include the SR-(NNNNNN) being withdrawn.

Note: Once a 'Support Request' has been completed, it cannot be withdrawn.