

IRM PROCEDURAL UPDATE

DATE: 03/28/2016

NUMBER: WI-01-0316-0618

SUBJECT: TAC Appointment Service

AFFECTED IRM(s)/SUBSECTION(s): 1.4.11.3.7

CHANGE(s):

IRM 1.4.11.3.7, Taxpayer Assistance Center (TAC) Appointment Service added clarification to (2)(f)

2. **TAC Procedures for the Appointment Service:** For the most current information, refer to the Accounts Management and FA Desk Guides.
 - a. Accounts Management (AM) Toll-free Customer Service Representatives (CSRs) are responsible for scheduling appointments on the TAC Appointment Calendar located on SharePoint. Refer to IRM 21.1.1.6, *Customer Service Representative (CSR) Duties* for AM Appointment instructions.
 - b. FA group managers will identify Individual Taxpayer Advisory Specialists (ITAS) availability on the appointment calendar for each day. It is recommended the FA group managers complete this task at least 30 days in advance or as soon as they know their employees schedule.
 - In Medium/Large TACs only, one ITAS will not be included in the daily schedule.
 - The unscheduled ITAS should be "assigned" on a rotational basis. The intent of the unscheduled ITAS is to cover the periods of time when an ITAS is assigned to other duties, such as remittance processing and mail. They will also assist during times of unexpected staffing shortages. In TACs without an Initial Assistant Representative (IAR), an unscheduled ITAS will cover the IAR desk/duties.
 - TACs with Facilitated Self Assistance (FSA) will assign an ITAS to assist taxpayers at the kiosk(s).
 - TACs with a Virtual Services Delivery (VSD) workstation will be included when scheduling appointments. The support site will follow IRM 1.4.11.3.6, *Virtual Services Delivery (VSD)*, and assign an ITAS to VSD for the day. The ITAS will not be included in the support site's appointment schedule.
 - c. The FA group manager will block break and lunch times for employees on the TAC appointment calendar.
 - d. The FA group manager should also input specific information in the notes about the appointment guidance, (examples: No Individual

Taxpayer Identification Numbers (ITINs) after XX p.m., and No Identity Theft contacts after XX p.m.) on the TAC appointment calendar. The AM CSRs should check the calendar notes for daily appointment guidance.

- e. The FA group manager is responsible for requesting SharePoint access for themselves and their employees. All employees will need access to the calendar in order to see the daily appointment schedule. Requests for SharePoint access will be sent to the Area Analyst.
- f. Appointments are to be scheduled starting at 8:30 a.m. when the TAC opens to the public. Only appointments for transcripts and payments should be scheduled between 3:45 p.m. and 4:00 p.m. After 4:00 p.m. no appointments will be scheduled. The average time per appointment is 25 minutes with a 5 minute wrap up time built in.

NOTE: ITIN Authentication contacts will be booked as one person per slot. For example, a family of four will have four slots.

- g. The FA Group Manager will ensure Pub 5202, *Appointment Only Poster for Field Assistance Taxpayer Assistance Centers*, which explains how to make an appointment in the TAC is displayed.
- h. Each appointment TAC is responsible for recording a memo count for each appointment scheduled by AM using the SharePoint calendar. Refer to the Appointment Service Closing Codes Guide, for additional information on memo counts.
- i. At the end of the day, it is recommended to print the TAC appointment calendar for the next day. Place the next day's appointment schedule in a central, secured location such as a locked cabinet or safe. The appointment schedule can be provided to remote offices by printing directly to an on-site printer or by sending via secure email. The TAC manager or designee should review the calendar at the beginning of each day to identify updates or changes.

NOTE: Exporting to EXCEL makes the information easier to print and sort. If a file is created or saved it should be deleted when no longer needed.