IRM PROCEDURAL UPDATE

DATE: 02/12/2026

NUMBER: ts-03-0226-0229

SUBJECT: Correspondence/Letter Set-Up Tool

AFFECTED IRM(s)/SUBSECTION(s): 3.12.38

CHANGE(s):

IRM 3.12.38.3.6(1) - Added follow local procedures. (2) - Update and clarify instructions and add Letter Toot Job Aid link. (3) - Update and clarify instructions removed a-d. (4) - Update and clarify instructions adding correspondence 10 day time frame. (5) - Removed, instructions not needed.

(1) Correspondence may be input, at campus option, by ERS Tax Examiners, or clerk typist, following local procedures.

(2) Input the letter using the IAT Cas Letter Tool. Refer to the Letter Job Aid at Letter Job Aid

(3) Input other Non-Pending C Letters using IAT as appropriate.

(4) Correspondence must be issued as soon as possible, but **no later than 10 business days from the ERS Suspense date**. If correspondence has **not** been issued within 10 business days, ACTVT and resuspend return Immediately and issue correspondence.

IRM 3.12.38.3.6.1 - Added Letter Tool Set-up instructions.

(1) This subsection lists procedures performed to set-up the Letter Tool prior to entering ICO Correspondence.

Note: If inputting correspondence for another site, remember to CMODE and use the other site's IDRS.

   a. Open IAT on Desktop after logging in to IDRS.

   b. Open Letters and select Options: CAS Mode - Checked; View - Unchecked; User Settings to complete tabs:

(2) Letter Tool Tab - the following listed items will be selected:

Section	Action
Tool Defaults	Check Show Selected Only

Tool Defaults	Default to DLN Research
Tool Defaults	Populate form to applicable fill-ins
Tool Defaults	Populate plan numbers to IRS Control Number
Tool Defaults	Populate tax period to applicable fill-ins
Tool Defaults	Populate TIN to applicable fill-ins
F5703 Print	Manual
Letter Sent	Confirm transmit of CC LPAGE
Letter Sent	Clear fields after letters are successfully sent
Letter Sent	Close tool after letters are successfully sent
Sort Letters	Usage
Sort Scenarios	Usage
Sort Paragraphs	Usage
LPAGE Defaults	Number: Specific by Form
LPAGE Defaults	Employee: (enter 10 digit number)
LPAGE Defaults	Suspend: R
LPAGE Defaults	Ex-Spouse: Unchecked
LPAGE Defaults	OMB, CB, and PA: All Blank
LPAGE Defaults	Return Address Code: Specific by Service Center - See Correspondex Return Address Codes (irs.gov).

(3) General Info Tab - Fill in Name, Mailing Address and Manager Information fields. The following listed items will be selected:

Section	Action

IDRS	Minimize IDRS when researching: Checked
508-Compliance	Zoom Text User: Checked

(4) Work Info Tab - Function and Program Code and Categories remain blank. The following listed items will be selected:

Section	Action
Organizational Information	BOD:TS SP
Organizational Information	Org: Input Correction
Organizational Information	Area: Error Resolution
Organizational Information	Title: Clerk or Tax Examiner
Organizational Information	Team Number: Enter Unit 5-digit number
Organizational Information	Badge Number: Varies by Clerk or Tax Examiner

(5) Letter Info Tab - the following listed items will be selected:

Section	Action
Signature Code	1. Austin - CJ 2. Kansas City - CB 3. Ogden - AJ
Opening	None
Certified Mail Signature Code	Blank
Closing	None
800 Number	800-829-1040
My Info	Fax: by Campus 1. Austin paper - 855-204-5020 2. Austin MeF - 844-254-2836 3. Kansas City Paper - 855-892-7588 4. Kansas City MeF - 844-254-2834

	5. Ogden Paper - 855-309-9361 6. Ogden MeF - 844-254-2835
My Info	All other fields to be completed by user

(6) Select "Save".