

IRM PROCEDURAL UPDATE

DATE: 05/16/2024

NUMBER: ts-21-0524-0652

SUBJECT: Updates to Organizational Name; Telephone Troubleshooting Reporting; Attempts Made for Faxing

AFFECTED IRM(s)/SUBSECTION(s): 21.1.1

CHANGE(s):

IRM 21.1.1.4(3) (a) - Added reference to Telephone Troubleshooting Reporting for clarity.

(3) Greet the caller.

- a. Promptly greet the caller as outlined in paragraph (2) above. If no one is on the line, first try to ensure the caller can hear you, (e.g., ask if the caller can hear you, repeat name and badge number, etc.). Allow **30 seconds** for a response. If no response after 30 seconds, follow the procedures in IRM 21.1.1.8.2(2), Telephone Troubleshooting Reporting, then disconnect the line and move to the next call.
- b. If the caller asks you to repeat your name and identification number, do so courteously and professionally.
- c. Speak to the caller in a pleasant, courteous and professional manner. Show a willingness to help, by using phrases such as "May I help you?" or "How can I help you?"

IRM 21.1.1.4(9) (a) - Provided the number of attempts a caller can make when faxing documents. This will alleviate high average handle times.

(9) Confirm the caller has already sent the fax and confirm the IRS fax number they sent it to **before** placing the caller on hold to retrieve the document. Advise caller of expected wait time, never more than five minutes. Return to caller if wait time is longer.

- a. If the caller is not able to send fax immediately, after two attempts, advise caller to call back when they are able to fax the required document(s).
- b. If the caller needs to be placed on hold after fax is received, follow procedures above, IRM 21.1.1.4 (8)(f).

IRM 21.1.1.4(24) (a) - Provided additional instructions and reference for voicemail messages on outgoing calls. Updated to provide IRM reference.

(24) When making outgoing calls, **do not**:

- a. Leave confidential tax information on a voice mail message or an answering machine message, unless you "reasonably believe" you have reached the taxpayer's or representative's correct answering machine or voicemail. See IRM 10.5.1.6.7.2, Answering Machine or Voicemail, for further information.
- b. Provide taxpayers/third parties with the telephone numbers of functional areas,
- c. Give the taxpayer or their representative the name or telephone number of **any** employee (i.e., CSR, manager, analyst, etc.) unless specifically required by an IRM, or
- d. Transfer taxpayer/third party calls to functional areas.

IRM 21.1.1.6.1(6) (a) - Added application numbers for clarity.

(6) When you identify the topic of the call:

- a. Advise the caller that you are transferring their call to the area that handles the question (identify the specific area). If the topic is making an appointment to a TAC office, provide the telephone number prior to the transfer, App 1055/1056.
- b. Press the proper TTG extension.
- c. Press transfer.

IRM 21.1.1.8.2(2) (NOTE) - Removed procedure to reflect the use of the Finesse Telephone System.

(2) The CSR must take the following steps on the Finesse desktop application to report a bad line if any audio transmission difficulties are experienced while talking to a taxpayer:

- a. Navigate the mouse cursor to the top-right of the Cisco Finesse Desktop.
- b. Select the down arrow next to the Report Bad Line to expand the list of options.
- c. Select the correct Bad Line Description.
- d. A confirmation dialog box will open to confirm the call was marked as a bad line call. Click OK to close the dialog box.

- e. If more than two consecutive calls are reported as bad line issues, see paragraph 5 below to determine if additional actions are needed.

Note: The Report Bad Line option only appears while in an active call.

Note: If the user decides to change the reason for the bad line, they may do so by selecting the appropriate option. Another dialog box will appear confirming the previous selection was overwritten

1. Click the Report Bad Line icon on the Cisco Finesse Desktop
2. Select the correct Bad Line Description
3. Click OK

Note: If this issue results in an incomplete call, the CSR must notify the manager immediately. Managers will refer to IRM 1.4.16.3.5.1(2), Bad Line/Dropped Calls.

Note: If the caller says they have been previously disconnected, the CSR must apologize and continue to assist the caller.