

IRM PROCEDURAL UPDATE

DATE: 10/09/2019

NUMBER: wi-21-1019-1096

SUBJECT: Updating Services in SSA Co-located TACs

AFFECTED IRM(s)/SUBSECTION(s): 21.3.4

CHANGE(s):

IRM 21.3.4.2.4.6.3 Making the Appointment Using the Calendar added Note for email reminder to (2) and clarification for appointments made within 72 hours to (4)(1)

1. Input the taxpayer's information into the TAC appointment calendar.
2. Secure the required information from the taxpayer and verify the completed entries, including the taxpayer's name and telephone number, including the area code.

NOTE: See below when email address is not required.

The phone number is extremely important, especially in the event appointments need to be cancelled or rescheduled. Other pertinent details may include other types of special services required or the name of the interpreter the taxpayer is bringing with them to the appointment.

NOTE: If the appointment is scheduled at one of the IRS/SSA co-located TACs, the taxpayer's Social Security Number (SSN) is required. Refer to IRM 21.3.4.2.4.6.6.2, *TACs Co-located in Social Security Administration Offices*, for additional instructions.

3. Email confirmations and reminders will be sent to taxpayers when an email address is provided.

NOTE: No reminder will be sent for appointment scheduled within 72 hours from the date scheduled. See Exhibit 21.3.4-18, *Suggested Scripts - When Making Appointments - Email Confirmation and Reminders*.

4. Accounts Management CSRs scheduling appointments in FAST will request the taxpayers email address and advise taxpayers of the following:
 1. A **confirmation email** will be sent within 24 hours of when the appointment is made.

NOTE: No appointment confirmation will be issued if taxpayer refuses to provide an email address or the appointment is created within 72 hours of the scheduled start time.

2. A **reminder email** is sent 48 hours prior to scheduled start time.

NOTE: No appointment reminder is issued if taxpayer refuses to provide an email address or the appointment is created within 72 hours of the scheduled start time.

3. AM CSRs will advise the taxpayer of the IRS email address provided in the confirmation email (i.e., CARE Customer Service Appointments <irsfast@midatl.service-now.com>).

NOTE: This will assist in confirming the email was generated from the appointment system.

IRM 21.3.4.2.4.6.6.2 TACs Co-located in Social Security Administration (SSA) Offices added Mt. Vernon, IL TAC to list in (1); added TPP issues to list of unavailable services

1. There are five TAC locations that have temporarily been moved from their original location to a local SSA office. These locations are:
 - o Presque Isle, ME
 - o Norwich (New London), CT
 - o Danville, VA
 - o North Platte, NE
 - o Mansfield, OH
 - o Mt. Vernon, IL
2. **All** contacts at these co-located TACs require an appointment regardless of the reason. No walk-in service is available.
 - a. Services are limited.
 - b. No cash is accepted.
 - c. No OPI service for a language interpreter is available.
 - d. No ITIN authentication service.
 - e. No TPP issues.

IRM 21.3.4.2.4.6.7.1 Rescheduling Policy and Confirmation of an Existing Appointment added clarification for handling the request to confirm, cancel or reschedule based on the ability to search the FAST tool to (1) and added information for rescheduling an appointment for a prior date to Note; added (2) Note for information on current day appointment reschedule requests and (2)(d) for closing confirmation procedure

1. CSRs on App55, without the ability to search the FAST tool, will refer the taxpayer that wants to confirm, cancel or reschedule an **existing** appointment. Refer to application 286 (English #92396 - Aspect/1286 - IUP) or application 287 (Spanish #92397 - Aspect/1287 - IUP).

EXCEPTION: If staffing App 55/56 and trained to confirm, cancel or reschedule an appointment, perform the steps below. Do not transfer to App 286/287.

NOTE: If the inquiry is to reschedule an appointment with a **prior date**, handle as a new appointment by all CSRs on App55 or 286. Refer to IRM 21.3.4.2.4.6, *Accounts Management Procedures for Appointment Service*.

2. CSR on application 286 or 287 can do this by performing the steps below if a taxpayer (or a spouse on a married filing joint return and / or an authorized third party) requests to reschedule or confirm an existing appointment. For third parties calling on behalf of the taxpayer, AM employees will need to authenticate their authority and identity before proceeding. Refer to IRM 21.1.3.2.3, *Required Taxpayer Authentication*, for additional information.
 - a. Locate the appointment by using the FAST search feature, such as, confirmation number, taxpayer's name, or location.
 - b. Verify the original appointment on the calendar by verifying taxpayer's name (first, last), phone number, known or assumed time of appointment, and issue(s) to be addressed.
 - c. If you do not believe the caller is the appropriate party to reschedule the appointment, then authenticate the caller before proceeding further. Refer to IRM 21.1.3.2.3, *Required Taxpayer Authentication*, for additional information.

NOTE: If the **appointment is for the current day** when the taxpayer calls and requests to be rescheduled or cancelled, do not select "edit" or "reschedule" on the current appointment in the calendar. This is for statistical tracking purposes. After verification of the existing appointment information, you can copy and paste the information onto the new appointment calendar.

- d. Before closing the conversation, review the newly scheduled appointment with the taxpayer. Refer to IRM 21.3.4.2.4.6.3, *Making the Appointment Using the Calendar*.

IRM 21.3.4.2.4.6.7.2 Cancellation Policy added clarification for handling the request to cancel an existing appointment based on the ability to search the FAST tool to (1) and (2)

1. CSRs on App55, without the ability to search the FAST tool, will refer the taxpayer that wants to cancel, an **existing** appointment. Refer to application

- 286 (English #92396 – Aspect/1286 – IUP) or application 287 (Spanish #92397 – Aspect/1287 - IUP).
2. CSRs on application 55 with the ability to cancel appointments and those in App 286 or 287 will follow the steps outlined below for accepting cancellations from the individual taxpayer (primary or secondary on a married filing joint return) or a business taxpayer (sole proprietor, partner, or corporate officer) or an authorized third party (POA).