



THE OFFICE OF THE TAXPAYER ADVOCATE OPERATES INDEPENDENTLY OF ANY OTHER IRS OFFICE AND REPORTS DIRECTLY TO CONGRESS THROUGH THE NATIONAL TAXPAYER ADVOCATE.

IRM PROCEDURAL UPDATE

DATE: 04/03/2025

NUMBER: tas-13-0425-0418

SUBJECT: Implementation of the Phoenix System

AFFECTED IRM(s)/SUBSECTION(s): 13.2.2

CHANGE(s):

IRM 13.2.2.1 - Removed any reference to Systemic Advocacy Management System (SAMS) and replaced it with Phoenix. Systemic Advocacy (SA) has replaced the Systemic Advocacy Management System (SAMS) with the Phoenix system to receive, control, document, and monitor systemic issues and advocacy projects. The Phoenix system will improve efficiency and the experience for TAS employees, stakeholders, and taxpayers. Phoenix went into effect as of 2/24/2025.

(1) TAS Systemic Advocacy (SA) oversees Phoenix. Both internal (e.g., IRS employees) and external (e.g., taxpayers) submitters can use Phoenix to report systemic issues that adversely impact taxpayers. The issues put on Phoenix are reviewed by employees in the Systemic Issue Review & Evaluation (SIRE) group. The goal is to resolve the systemic issue (problem), and this often involves recommendations to change IRS procedures and processes.

(2) **Audience:** TAS, primarily employees within Systemic Advocacy (SA).

(3) **Policy Owner:** Executive Director Systemic Advocacy (EDSA).

(4) **Program Owner:** Executive Deputy Director, Systemic Advocacy, Proactive Advocacy (DEDSA-PA).

(5) **Contact Information.** Employees should contact the Product Content Owner provided on the Product Catalog Information page for this IRM. To recommend changes or make any other suggestions related to this IRM section, see IRM 1.11.6.6, Providing Feedback About an IRM Section - Outside of Clearance.

IRM 13.2.2.1.1 - Added background section for internal controls requirement.

(1) Throughout the Taxpayer Advocacy Service (TAS), employees play a vital role in identifying, analyzing, and resolving broad-based taxpayer problems. These taxpayer problems come to TAS's attention through several sources including offices within TAS, Internal Revenue Service (IRS) employees, and external stakeholders. SA has replaced Systemic Advocacy Management System (SAMS) with the Phoenix system to receive, control, document, and monitor systemic issues and advocacy projects. The staff is engaged in the evaluation and resolution of issues and acts expeditiously to address matters of taxpayer rights and the reduction of burden.

IRM 13.2.2.1.3 - Removed any reference to Systemic Advocacy Management System (SAMS) and replaced it with Phoenix.

(1) The EDSA reports directly to the NTA. The EDSA has oversight responsibility for two divisions, Proactive Advocacy and Technical Advocacy. The DEDSA-PA and the Deputy Executive Director, Systemic Advocacy, Technical Advocacy (DEDSA-TA) report to the EDSA and are responsible for identifying and raising awareness of systemic issues impacting taxpayers. The DEDSA-PA, along with the Director, Advocacy, Implementation and Evaluation (AIE) have overall responsibility for the review and disposition of issues submitted on Phoenix. The Chief, Systemic Issue Review & Evaluation (SIRE) is responsible for the work completed by the SIRE Program Manager (PM) and SIRE analysts.

(2) The program analysts in SIRE will, as needed, reach out to Subject Matter Experts (SMEs) in SA Technical Advocacy. The SMEs provide advice and guidance on the root cause of problem(s) and how to resolve the systemic issue.

(3) The ultimate goal of the advocacy analysts is to ensure the systemic issue is resolved while respecting taxpayer rights and minimizing taxpayer burden.

IRM 13.2.2.1.4(2) - Program Reports, Phoenix Reports replaced Business Objects Enterprise (BOE) Reports.

(1) SA has established several management reviews to assess program effectiveness. One review is the periodic monthly review of the work done by a program analyst in SIRE. The second review is the weekly review of all issues ready to close by the SIRE Chief or SIRE PM. Finally, a third review is the weekly closed issue review completed by a cross-functional team from various TAS functions.

IRM 13.2.2.1.5(1) - Removed any reference to Systemic Advocacy Management System (SAMS) and replaced it with Phoenix.

IRM 13.2.2.1.5(2) - Replaced Business Objects Enterprise (BOE) Reports with Phoenix Reports.

(1) The Chief, SIRE, along with the SIRE PM prepare a list each week of issues on Phoenix that are ready for final review and closing. As needed, SIRE will move the issue to a project

team if the resolution of the issue requires additional research and/or negotiation with the IRS.

(2) Program Reports - SA uses Phoenix Reports for the reporting of program objectives (e.g., age of inventory).

IRM 13.2.2.1.6 - Added term & acronym tables.

(1) The following table defines terms that appear throughout this IRM section:

Term	Definition
Phoenix	System used to receive, control, document, and monitor systemic issues and advocacy projects
Proactive Advocacy	SA team responsible for identifying and raising awareness of systemic issues
Technical Advocacy	SA team containing Subject Matter Experts

(2) The following table provides acronyms that are used throughout this IRM section:

Acronym	Definition
BSP	TAS Business Systems Planning
DEDSA	Deputy Executive Director, Systemic Advocacy
DEDSA-PA	Deputy Executive Director, Systemic Advocacy, Proactive Advocacy
DEDSA-TA	Deputy Executive Director, Systemic Advocacy, Technical Advocacy
EDSA	Executive Director, Systemic Advocacy
SA	Systemic Advocacy
SIRE	Systemic Issue Review & Evaluation
SIRE PM	SIRE Program Manager
SME	Subject Matter Expert

IRM 13.2.2.2(1) and (2) - Removed any reference to Systemic Advocacy Management System (SAMS) replaced it with Phoenix and clarified that Phoenix can be accessed from the TAS Welcome Screen under Systemic Advocacy.

IRM 13.2.2.2(3) - Removed reference to Help link and FAQs in Phoenix since these have not been developed.

(1) Phoenix allows all IRS employees and external stakeholders to submit issues to the TAS SA. Any employee can search Phoenix to find out whether similar issues are under development or have been resolved. Employees may also research submissions and track their status.

(2) TAS employees can access Phoenix from the TAS Welcome Screen under Systemic Advocacy.

IRM 13.2.2.3(1) - Removed any reference to Systemic Advocacy Management System (SAMS) and replaced it with Phoenix.

IRM 13.2.2.3(2) - Describes the BEARS entitlement requests available for Phoenix access.

IRM 13.2.2.3(4) - Removed reference to passwords to access Phoenix and explains Single SignOn access to Phoenix. Added link on where to find current courses about Phoenix. Removed reference to ITM courses on Phoenix since they have not been developed.

(1) TAS users must access the Business Entitlement Access Request System BEARS (BEARS) to request an entitlement to Phoenix. In the Special Instructions text field, each user must indicate how they will be using the requested Phoenix application (for example, to update my task force; to review Phoenix issues; to view Phoenix reports; to review Projects).

(2) Choose the BEARS entitlement you need according to your job position in Systemic Advocacy (SA), Technical Analysis and Guidance (TAG), or ITAP:

- PROD ADMIN AWS CRM SALESFORCE TAS-PHOENIX BUSINESS (CRM)
- PROD USER AWS CRM SALESFORCE TAS-PHOENIX TECHNICAL ANALYSIS AND GUIDANCE (CRM)
- PROD MGR AWS CRM SALESFORCE TAS-PHOENIX ITAP RATA (CRM)
- PROD MGR AWS CRM SALESFORCE TAS-PHOENIX ITAP ROTA (CRM)
- PROD MGR AWS CRM SALESFORCE TAS-PHOENIX ITAP ATA (CRM)
- PROD ANALYST AWS CRM SALESFORCE TAS-PHOENIX SIRE (CRM)
- PROD USER AWS CRM SALESFORCE TAS-PHOENIX SIRE PM-CHIEF (CRM)
- PROD USER AWS CRM SALESFORCE TAS-PHOENIX PROJECT OWNER (CRM)
- PROD USER AWS CRM SALESFORCE TAS-PHOENIX PROJECT-DIRECTOR-COLLECTIONS (CRM)
- PROD USER AWS CRM SALESFORCE TAS-PHOENIX PROJECT-DIRECTOR-EXAM (CRM)
- PROD USER AWS CRM SALESFORCE TAS-PHOENIX PROJECT-DIRECTOR-PROCESSING (CRM)
- PROD USER AWS CRM SALESFORCE TAS-PHOENIX PROJECT-DIRECTOR-TECHNICAL LIAISON (CRM)
- PROD USER AWS CRM SALESFORCE TAS-PHOENIX DEDSA (CRM)
- PROD USER AWS CRM SALESFORCE TAS-PHOENIX EDSA (CRM)
- PROD ANALYST AWS CRM SALESFORCE TAS-PHOENIX ADVOCACY EFFORTS (CRM)

(3) Each user's manager is required to review and approve the BEARS request.

(4) Once the BEARS is processed, you will be able to access the system. Passwords are not used in Phoenix. Access is granted based on Single SignOn.

Note: Currently, you may find Phoenix courses on: TAS Phoenix News

IRM 13.2.2.4(1) (3) and (4) - Removed any reference to Systemic Advocacy Management System (SAMS) replaced it with Phoenix and modified instructions to request BEARS Disable user when changing job positions or separating from service.

(1) Please ensure no Personal Identifying Information (PII) is recorded in Phoenix.

Note: Phoenix Case File Numbers can be added to Phoenix, as long as no PII, such as name or Taxpayer Identification Number (TIN) is recorded.

(2) Lock the workstation screen or sign off the system if you leave your workstation for any length of time. Report any suspected compromise or abuse of the system to your local office security representative or management.

(3) If your job duties change or you separate from service, and no longer need to access the Phoenix database, please complete a BEARS request to Disable user.

(4) Multiple login processes (i.e., a user being signed on more than once using the same login or attempting to conduct two or more Phoenix sessions simultaneously) are not permitted.

IRM 13.2.2.6(1) - Replaced Directory link to find SIRE Chief and SIRE Program Manager to report Phoenix problems.

IRM 13.2.2.6(1) through (5) - Removed any reference to Systemic Advocacy Management System (SAMS) replaced it with Phoenix and replaced how employees can report long-term SAMS change suggestions to how employees can receive information and updates on Phoenix in the TAS Welcome Screen.

(1) TAS employees who encounter technical or programming problems with Phoenix should report them as a Priority 2 (P2) ticket to the Information Technology (IT) Help Desk by telephone at 1-866-743-5748 or through the IT website. You may also notify or send inquiries to the SIRE Chief or SIRE Program Manager once a ticket has been created. Their names can be found on the TAS Welcome Screen under Systemic Advocacy on TAS Directory:
TAS Directory.

(2) Once a problem has been identified, to expedite resolution, the Phoenix Administrator should send an email to the Phoenix System Administrators in the Tier II Wintel Group in Enterprise Operations (EOps) with the P2 ticket number from IT. The DAIE should also be notified.

(3) If it appears the system outage will last more than 20 minutes, TAS Business Systems Planning (BSP) or the Phoenix Administrator should send an email to all potential Phoenix users in the following mail distribution group: &TAS SA Staff.

(4) If the down time is expected to last more than two hours, BSP or the Phoenix Administrator may submit a Communication Assistance Request (CAR) for a TAS-wide alert

on the outage. Once EOps fixes the problem, submit another CAR or send a follow-up email, as the case may be, to inform users the system is back up.

Note: Use this procedure only for immediate problems that interfere with your use of Phoenix.

(5) Employees will continue to receive information and updates about Phoenix in the TAS Welcome Screen, TAS Phoenix News.

IRM 13.2.2.7(1) through (5) - Removed any reference to Systemic Advocacy Management System (SAMS) and replaced it with Phoenix.

(1) The Security Assessment Report (SAR) in the fiscal year 2009 Phoenix Certification and Accreditation (CA) identified a security weakness based on the lack of established procedures for managing Phoenix user accounts. The recommendation was to "create a process to ensure user accounts are sufficiently managed and updated based on roles on a regular basis". In response to the identified security risk, TAS BSP and SA have implemented the procedures that follow in steps 2-6 below.

(2) By the 15th of each month, the Phoenix Administrator in BSP will perform a monthly validation of Phoenix user accounts in active status. The validation will ensure:

- Accounts in active status have currently valid BEARS records; and
- Accounts are deactivated for employees no longer in TAS.

(3) The Administrator will send an email notification to the Phoenix Program Manager with the user accounts that may require corrective action. Within seven (7) days from receipt of notification, the SIRE PM will respond to confirm corrective action has been taken or the reasons corrections are not warranted.

(4) To help facilitate reviews of Phoenix users' permissions (User Roles), the Phoenix Administrator will generate BOE reports producing separate lists of:

- Phoenix Users' currently assigned User Roles, and
- User activity on Phoenix work objects either in open status or closed within the previous 12 months.

(5) These reports will serve to filter and narrow the scope of review by identifying user accounts that potentially warrant adjustments to the roles of Phoenix users. The Administrator will provide the report analysis to the SIRE Program Manager on a quarterly basis, within 15 days following the end of each quarter.

(6) The SIRE Program Manager will review the reports, determine if changes are appropriate, and adjust users' roles as necessary. The SIRE Program Manager will notify the Administrator upon completion of the review no later than 30 days following the close of each quarter.

IRM 13.2.2.8 - Section no longer required due to procedural changes.