



OFFICE OF THE TAXPAYER ADVOCATE  
WASHINGTON, DC 20224

August 17, 2022

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Expiration Date: 03/31/2023

Impacted IRM(s): IRM 13.1.16, IRM 13.1.18,  
IRM 13.1.19, IRM 13.1.21, IRM 13.1.8

MEMORANDUM FOR TAXPAYER ADVOCATE SERVICE EMPLOYEES

FROM: /s/ Bridget Roberts  
Deputy National Taxpayer Advocate

SUBJECT: Extension of Existing Interim Guidance on TAS Case Procedures and  
Eliminating Centralized Manual Refund Monitoring

The purpose of this memorandum is to reissue the guidance previously announced in IGM TAS-13-0222-0005, with a later expiration date, and one modification.

**TEMPORARY MODIFICATION OF CERTAIN CASE PROCESSING PROCEDURES  
AND DE-CENTRALIZATION OF MANUAL REFUND MONITORING**

To alleviate the burden of high inventories on TAS case advocacy employees, TAS previously modified case procedures and centralized manual refund monitoring in [IGM TAS-13-0222-0005](#), Interim Guidance to Temporarily Modify TAS Case Procedures. Those modifications and centralizations are scheduled to expire on September 30, 2022. TAS continues to have high inventories, and accordingly, I am extending those modifications until March 31, 2023 as shown in Appendix 1; however, there is no longer a need to centralize manual refund monitoring.

In early March of 2023, TAS will evaluate these modifications and centralizations to determine if continuing these activities beyond March 31, 2023 is needed.

The Deputy National Taxpayer Advocate may modify, rescind, or extend this guidance at any time by notifying TAS employees through the issuance of a TAS Welcome Screen article discussing the change in guidance and updating Appendix 1.

**EFFECT ON OTHER DOCUMENTS**

TAS **will not** incorporate this guidance into the next revision of IRM 13.1.16, Receipt and Intake of TAS Cases, IRM 13.1.18, Resolving TAS Cases, IRM 13.1.19, Advocating with Operations Assistance Requests (OARs), IRM 13.1.21, Closing TAS Cases, IRM 1.4.13, TAS Guide for Managers, or IRM 13.1.8, Congressional Affairs Program. This guidance supplements [IGM TAS-13-0222-0004](#). This guidance supersedes [TAS-13-0222-0005](#), Interim Guidance to Temporarily



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Modify TAS Case Procedures, and will remain in effect until March 31, 2023 (or the rescission date communicated by the Deputy National Taxpayer Advocate). In the event any IRM with provisions discussed in this IGM is published while this IGM is in effect, this IGM will supersede the newly published IRM until the IGM expires or is rescinded.

**CONTACT**

If you have any questions, please contact Michael T. Kenyon, Deputy Executive Director, Case Advocacy, Technical Support, 701-237-8299.

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