



OFFICE OF THE TAXPAYER ADVOCATE
WASHINGTON, DC 20224

December 21, 2021

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MEMORANDUM FOR TAXPAYER ADVOCATE SERVICE EMPLOYEES

FROM: /s/ Bonnie Fuentes
Executive Director Case Advocacy, Intake and Technical Support

SUBJECT: Interim Guidance – Document Upload Tool for Submissions from
External Sources

The purpose of this memorandum is to establish procedures for the Taxpayer Advocate Service (TAS) use of Document Upload Tool (DUT) which allows taxpayers, their representatives, or congressional aides to submit documents to TAS using the [Submit Document to Taxpayer Advocate Service \(TAS\) digital mailbox](#) on IRS.gov.

Roll Out of the TAS DUT Mailbox

TAS will perform a controlled roll out of the DUT beginning with a small number of Congressional offices. TAS will gradually expand the TAS DUT mailbox to a wider audience as determined by the Executive Director, Case Advocacy, or her designee. The Executive Director, Case Advocacy, or her designee, will also appoint an NBU employee to provide routine oversight of the DUT to ensure submissions are being processed in a timely manner and coordinate with TAS Business Modernization on any technical issues with the DUT.

TAS can share the [Submit Documents to Taxpayer Advocate Service \(TAS\)](#) mailbox with the approved audience by phone, letter, or emailed correspondence in accordance with [IGM TAS-13-1221-0015 - Interim Guidance – Digital Signatures and External Email Communications](#).

TAS employees will provide the taxpayer with the Reference Code of the office where the case is assigned to make it easier to search for documents in the DUT mailbox. See [Appendix 1, Reference Codes](#). For example, TAS employees can include the following statement in a letter to the taxpayer:

You can submit the requested documents to the TAS online mailbox at www.irs.gov/tasconnect. Not all web browsers are supported, if you are unable to access the site you may need to switch to a more current web browser. When sending documents



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online, please input the TAS Case Number found at the top of this letter and Reference Code [insert the reference code per [Appendix 1](#)].

Processing Documents Submitted to the DUT Digital Mailroom

TAS will retrieve taxpayer records submitted to the TAS DUT daily. TAS employees designated to retrieve the records will access the Document Upload Tool Admin Dashboard using Microsoft Edge. To gain access to this dashboard input a technology request on Business Modernization's homepage. The requests will need to include the users name and SEID.

For further information on processing documents or Form 911, Request for Taxpayer Advocate Service Assistance (And Application for Taxpayer Assistance Order), submitted to the TAS DUT see the Document Upload Tool User Guide.

The DUT is a tool for taxpayers to easily submit documents needed to resolve their tax problems or to request TAS assistance. Unrelated submissions such as advertisements, general tax questions, and political statements are not appropriate and TAS will not respond to or address these submissions. As TAS continues to expand the use of the DUT mailbox it will monitor the success of those interactions, the volume of submissions, as well as the effectiveness of the mailbox and these procedures.

The Deputy National Taxpayer Advocate may modify, suspend, or rescind this guidance or the functionality of the DUT mailbox at any time by notifying TAS employees through the issuance of a TAS Welcome Screen article discussing the changes.

Effect on other documents

TAS will incorporate this guidance into the next revision of IRM 13.1.11, Case and Inventory Management.

Contact

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

www.irs.gov

Appendix 1: Reference Code

If the case is assigned to the Local Taxpayer Advocate Office in:	Then the Reference Code is:
Alabama	63
Alaska	92
Arizona	86
Arkansas	71
California (Fresno Campus)	89
California (Laguna Niguel)	33
California (Los Angeles)	95
California (Oakland)	94
California (Sacramento)	68
California (San Diego)	32
California (San Jose)	77
Colorado	84
Connecticut	06
Delaware	51
District of Columbia	53
Florida (Ft. Lauderdale)	65
Florida (Jacksonville)	59
Florida (St. Petersburg - Tampa)	67
Georgia (Atlanta City Center)	58
Georgia (Atlanta Campus)	07
Hawaii	99
Idaho	82
Illinois (Chicago)	36
Illinois (Springfield)	37
Indiana	35
International	66
Iowa	42
Kansas	48
Kentucky (Louisville)	61
Kentucky (Cincinnati Campus)	17
Louisiana	72
Maine	01
Maryland	52
Massachusetts (Boston)	04
Massachusetts (Andover Campus)	08



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If the case is assigned to the Local Taxpayer Advocate Office in:	Then the Reference Code is:
Michigan	38
Minnesota	41
Mississippi	64
Missouri (St. Louis)	43
Missouri (Kansas City Campus)	09
Montana	81
Nebraska	47
Nevada	88
New Hampshire	02
New Jersey (Springfield)	22
New Jersey (Trenton)	26
New Mexico	85
New York (Albany)	14
New York (Brookhaven Campus)	19
New York (Brooklyn)	11
New York (Buffalo)	16
New York (Manhattan)	13
North Carolina (Charlotte)	44
North Carolina (Greensboro)	56
North Dakota	45
Ohio (Cincinnati)	31
Ohio (Cleveland)	34
Oklahoma	73
Oregon	93
Pennsylvania (Philadelphia Campus)	28
Pennsylvania (Pittsburgh)	25
Rhode Island	05
South Carolina	57
South Dakota	46
Tennessee (Memphis Campus)	49
Tennessee (Nashville)	62
Texas (Austin)	18
Texas (Dallas)	75
Texas (El Paso)	79
Texas (Houston)	76
Utah (Ogden Campus)	29
Vermont	03



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If the case is assigned to the Local Taxpayer Advocate Office in:	Then the Reference Code is:
Virginia	54
Washington	91
West Virginia	55
Wisconsin	39
Wyoming	83