IRM PROCEDURAL UPDATE

DATE: 01/12/2024

NUMBER: wi-01-0124-0081

SUBJECT: W&I Organizational Realignment

AFFECTED IRM(s)/SUBSECTION(s): 1.1.13

CHANGE(s):

IRM 1.1.13.4.2.6, New Section added Project Office (PO). Previously found in IRM 1.1.13.4.3.3, Customer Account Data Engine (CADE) Project Office (CPO). Moved due to W&I realignment.

(1) **Mission:** To drive business strategy for modernization initiatives that delivery Servicewide tax processing improvements and provide enterprise data delivery services for taxpayers and business operations.

(2) To accomplish the mission, the Project Office (PO) coordinates across IRS modernization initiatives and legacy programs to ensure integrated solutions meet the needs of business operations. PO:

    a. Serves as the primary liaison between Information Technology and business operating divisions for modernization initiatives.
    b. Approves the implementation of enhanced business capabilities and manages business supports for project development, testing, and deployment.
    c. Completes business impact assessments and approves trade-off decisions for project scope changes and risk assessments.
    d. Manages project development and integration issues, prepares data, recommends options for resolution, and escalates unresolved issues to the appropriate Governance Body.
    e. Completes Enterprise Organizational Readiness and transition management activities to ensure successful modernization deployments.
    f. Communicates consistent messages to internal and external audiences regarding business priorities, project status, busness value, and modernization project results.
    g. Supports development of business cases, cost models, and measures for Wage and Investment projects.

(3) PO reports to the Director, Business System Modernization (BSM).

(4) The office symbols for PO are SE:W:O:BSM:PO

(5) Visit PO at: BSM Project Office (sharepoint.com).

IRM 1.1.13.4.2.7, New Section added Rules and Requirements (RR). Previously found in IRM 1.1.13.4.3.4, Customer Account Data Engine (CADE) Rules and Requirements (CRR). Moved due to W&I realignment.

(1) **Mission:** To develop and deliver business requirement standards and rules that support IMF modernization and the implementation of new functionality aimed at improving the internal and external effectiveness and efficiency of the Service.

(2) To accomplish the mission, Rules and Requirements (RR):

  a. Elicits and develops new business requirements.
  b. Models business process flows.
  c. Creates business requirements packages for delivery.
  d. Creates and maintains a Business Design that reflects the business interpretation of individual tax processing.

(3) RR reports to the Director, Business System Modernization (BSM).

(4) The office symbols for RR are SE:W:O:BSM:RR.

(5) Visit RR at: Rules & Requirements (sharepoint.com).

IRM 1.1.13.4.3, Removed references of Project Office and Rules and Requirements.

(1) **Mission:** To support Wage and Investment (W&I) business and technology integration, by providing technology insight and support, including risk management. Through collaboration and promoting strong stakeholder partnerships, we deliver tools and technologies to support a well-equipped workforce and increased agility/efficiency for W&I.

(2) To accomplish the mission, Business Technology Operations (BTO), formerly Modernization Tools and Technologies (MTT):

  a. Supports business technology strategy and provides enhanced data to support business re-engineering opportunities and Servicewide strategies that improve tax processing.
  b. Provides rapid delivery of nimble, scalable employee automation solutions through Integrated Automation Tools (IAT).
  c. Manages Technology Integration and Program Support (TIPS) for W&I.
  d. Leads the W&I Risk Management Program, fostering an integrated approach to Risk for W&I.

e. Provides business operational services (including W&I Incident Management, Unified Work Request support, IT demand and technology modernization areas).

f. Supports, conducts planning, sets policy, and provides oversight and guidance for W&I's internal management controls; GAO and TIGTA audit and post audit processes; the GAO financial audit; the A-123 review; Internal Management Documents; the National Taxpayer Advocate (NTA) Most Serious Problems (MSPs); and Electronic Research.

(3) The Director, BTO reports to the Director, Wage and Investment Operations Support (WIOS).

(4) The following functions report to the Director, BTO:

- Integrated Automation Technologies (IAT)
- Technology, Integration and Program Support (TIPS)
- Program Evaluation and Improvement (PEI)
- Business Operations Support (BOS)

(5) The office symbols for BTO are SE:W:O:BTO.

(6) Visit BTO at: Business Technology Operations (sharepoint.com).

IRM 1.1.13.4.3.4, Removed Development, Modernization and Enhancement (DME) references from paragraph 2C.

(1) **Mission:** To provide business operational services, including Information Technology (IT) incident management, demand and technology modernization analysis and support, to prioritize and enable consistent business decisions in the delivery of Wage and Investment (W&I) stakeholder solutions.

(2) To accomplish the mission, Business Operations Support (BOS):

a. Serves as liaisons, consultants, advisors, and coordinators to W&I executives for mission critical Incident Management.

b. Provides administration, analysis, and reporting on the W&I Unified Work Request (UWR) program.

c. Supports and provides guidance to W&I functions for the Operations and Maintenance (O&M) IT funding needs process.

d. Coordinates and manages Federal Information Security Management Act (FISMA) business-related activities for the CADE 2 and Individual Master File (IMF) applications.

e. Coordinates business activities for CADE 2 production maintenance.

(3) The Chief, BOS, reports to the Director, Business Technology Operations (BTO).

(4) The office symbols for BOS are SE:W:O:BTO:BOS.

(5) Visit BOS at: W&I Business Operations Support - Home (sharepoint.com).

IRM 1.1.13.7.3.1, Renamed section to Reports, Equipment, Phones (REP) from Quality and Joint Operations Center (JOC) Operating Division Representative (RQ&JR). Removed references of RQ&JR. Updated office symbols.

(1) **Mission:** To provide program support through data, analysis and process improvements to Accounts Management (AM) headquarters and field directorates.

(2) To accomplish the mission, Reports, Equipment, Phones (REP):

   a. Provides input related to Government Accountability Office (GAO), Treasury Inspector General for Tax Administration (TIGTA), and National Taxpayer Advocate (NTA) audits/reports (as needed).
   b. Represents AM on councils and steering committees specific to gathering data of areas impacting the Enterprise telephone or inventory environment.
   c. Consolidates AM issues and status updates for weekly distribution to the Director, AM and Deputy Director, AM.

(3) The Program Manager of REP reports to the Director, AM and Deputy Director, AM.

(4) The following teams report to the Program Manager of REP:

   a. Reports, Analysis and Data team (RAD)
   b. Joint Operations Center Operating Division Rep (JOC Rep)
   c. Equipment Request Telework Management (ERTM)

(5) The office symbols for REP are SE:W:CAS:AM:REP.

IRM 1.1.13.7.3.1.1, Clarified Reports, Analysis and Data (RAD) reports to the Program Manager of REP.

(1) **Mission:** To extract/compile data, prepare reports and provide feedback to headquarters personnel on the achievement of strategic operational measures.

(2) To accomplish the mission, the RAD team:

   a. Coordinates and controls the directorate mid-year and end-of-year assessments.
   b. Develops reports to monitor the implementation of new procedures to assist headquarters (HQ) personnel in assessing the impact on program delivery.

c. Tracks achievement of Site Level Indicators and Measures (SLIM).

d. Monitors, tracks and reports inventory and telephone programs.

e. Monitors, tracks and reconciles all Accounts Management (AM) data (Work Planning and Control (WP&C), Correspondence Imaging System (CIS), Electronic Transmitted Documents (ETD), Accounts Management Inventory Report (AMIR), etc.).

f. Develops and distributes the Fiscal Year Program Letter.

g. Develops filing season readiness templates and coordinates filing season readiness certifications.

h. Prepares reimbursable reports.

i. Develops and provides assumptions for the inclusion in work plans and/or work schedules.

j. Updates and publishes annual revisions to IRM 1.4.16, Accounts Management Guide for Managers.

k. Develops and disseminates reports that track productivity, inventory and aged case levels.

l. Participates in site assistance visits, providing reports and necessary follow-up.

(3) RAD reports to the Program Manager of REP.

(4) The office symbols for RAD are SE:W:CAS:AM:REP:RAD.

IRM 1.1.13.7.3.1.2, Clarified JOC reports to the Program Manager of RAP.

(1) **Mission:** To Enhance the Accounts Management (AM) customer experience through collaboration with Joint Operations Center (JOC) to identify and resolve issues pertaining to telephone call routing and scripting, as well as, electronic media contacts; and, serve as liaison between a variety of internal and external stakeholders to ensure telephone and web-based automated systems, projects, and initiatives support the needs of the directorates and AM customers.

(2) To accomplish the mission, the JOC Rep:

a. Identifies and resolves issues with the JOC pertaining to telephone call routing and scripting, as well as electronic media contacts as they impact AM customers.

b. Ensures AM interests are met regarding Integrated Customer Contact Environment (ICCE) and other automated interactive applications.

c. Provides support and business requirements relative to call routing to AM resources including the call centers.

d. Serves as the business liaison with Information Technology (IT) relative to the roll-out or development of new call center environment technology.

e. Identifies system or call processing deficiencies that negatively impact the customer experience and/or business results; works with the JOC to evaluate and implement solutions.

f. Identifies business requirements related to new initiatives or programs and works with internal and external stakeholders to ensure successful implementation of call routing strategies.

g. Provides program support to AM field offices.

h. Acts as the administrative support to the Contracting Officer's Representative (COR) for AM contracts (i.e., National Telecommuting Institute (NTI), Over the Phone Interpreter (OPI), Bureau of the Fiscal Service (BFS)).

(3) JOC Rep reports to the Program Manager of REP (Reports, Equipment and Phones).

(4) The office symbols for JOC Rep are SE:W:CAS:AM:REP:JOCREP.

IRM 1.1.13.7.3.1.3, New Section added Equipment Request and Telework Management (ERTM). Previously section title was Process Improvements Customer Accuracy (PICA). PICA moved to IRM 1.1.13.7.3.8.2 due to W&I realignment.

(1) **Mission:** To provide support and resolution through collaboration relative to the technology and telework environment. We serve as a liaison between a variety of internal stakeholders, including AM Directorates and Information Technology (IT), to ensure that they have the equipment and resources needed to achieve operational goals.

(2) To accomplish the mission, ERTM:

a. Serves as the business liaison with Information Technology (IT) relative to EEFax technology.

b. Monitors and coordinates with headquarters (HQ) Facilities Management and Security Services (FMSS) and IT on equipment needs including developing plans and responding to requests from stakeholders.

c. Provides oversight and coordination as the HQ Point of Contact (POC) for Business Continuity for the AM campuses.

d. Acts as AM HQ liaison for the campus site coordinators to ensure consistency between AM and Submission Processing (SP).

e. Acts as the AM POC for the start-up of the Volunteer Income Tax Assistance (VITA) program at all campuses for campus employees to ensure consistency between AM and SP.

f. Provides support to the AM directorates for new hire equipment. Track New Hire headsets, laptops, and other peripheral equipment. Certify the correct above baseline software is loaded for each laptop for their specific job title (i.e., CSRs, TEs, and Clerks). Monitor, facilitate, and help perfect the UWR's processed for each directorate, ensuring stakeholders are prepared for Fiscal Year hiring goals.

g. Provides oversight of laptop validations and compliance for all AM directorates to certify users are assigned only to the laptop issued.

h. Administer reports to all AM directorates to alert of any impact to the quality of calls between the IRS and customers, and safeguard the confidentiality, and integrity of IRS communications for those teleworking.

(3) ERTM reports to the Program Manager of Reports, Equipment, and Phones (REP).

(4) The office symbols for ERTM are SE:W:CAS:AM:REP:ERTM.

IRM 1.1.13.7.3.4, Added paragraph four that specifies Policy and Procedures BMF (PPB) is responsible for dual Master File.

(1) **Mission:** To develop policy and procedural guidelines for Policy and Procedures BMF (PPB) Accounts Management (AM) programs and assess/implement program efficiencies to improve balanced measures.

(2) The Program Manager of PPB reports to the Director, AM and Deputy Director, AM.

(3) Policy and Procedures BMF (PPB) is comprised of the following teams:

*   Specialty Accounts
*   Business Adjustments

(4) PPB is responsible for dual Master File (i.e., IMF and BMF) of all applicable programs under PPB purview.

(5) The office symbols for PPB are SE:W:CAS:AM:PPB.

IRM 1.1.13.7.3.4.1, Clarified Specialty Accounts (SA) purview.

(1) **Mission:** To support the mission of Accounts Management (AM) by developing policy, procedures and guidelines for processing specialty account (SA) related issues including refund offsets, injured spouse allocations, Practitioner Priority Service (PPS), Taxpayer Advocate Service (TAS), AM Authentication, operational guidelines, systems and research, Centralized Authorization File (CAF), Accounts Maintenance Research Hold (AMRH), and Statutes.

(2) To accomplish the mission, SA:

a. Supports all activities identified by Policy and Procedures BMF (PPB) related to specialty programs.

b. Evaluates legislative changes, current policy decisions, process improvement suggestions, technical advice, and other sources to write or revise IRM procedures.
c. Develops IRMs for all applicable programs under PPB:SA purview.
d. Coordinates activities related to IRM publishing and distribution; interacts with the Wage and Investment (W&I) AM IRM Coordinator and internal publishing services to ensure proper layout of paper and electronic version IRM pages, and tracks field feedback on the IRM.
e. Assists with training development efforts with Training and the Learning and Education (L&E) organization to ensure training is delivered using current materials.
f. Serves as subject matter expert (SME) for program assignments on cross-functional issues.
g. Serves as liaison to Bureau of the Fiscal Service (BFS) and other agencies to resolve Treasury Offset Program (TOP) problem cases.
h. Perform program reviews on assigned programs to ensure consistency and accuracy within the sites.
i. Prepares responses to audit findings from Treasury Inspector General for Tax Administration (TIGTA) and Government Accountability Office (GAO) reports related to all programs assigned to SA and provides guidance on audit follow-up responses; ensures necessary changes are implemented because of reports and findings.

(3) Specialty Accounts monitors and makes suggestion for improvement, including coordination with other responsible AM headquarters stakeholders, to improve programs under areas of responsibility, which include:

- Third Party Authorizations
- Centralized Authorization File (CAF)
- Practitioner Priority Services (PPS)
- Refund offsets including tax and non-tax offsets
- Form 8379, Injured Spouse Allocation
- Statutes
- Operational Guidelines
- Disclosure
- Integrated Automation Technology (IAT) Tools
- Taxpayer Advocate Service (TAS)
- Accounts Maintenance Research Transcripts (AMRH)
- IRMs include:

IRM Number	IRM Title
IRM 21.1.3	Operational Guidelines Overview
IRM 21.2.1	Systems
IRM 21.2.2	Research
IRM 21.2.3	Transcripts
IRM 21.2.4	Master File Accounts Maintenance

IRM 21.3.7	Processing Third-Party Authorizations onto the Centralized Authorization File (CAF)
IRM 21.3.10	Practitioner Priority Service (PPS)
IRM 21.4.6	Refund Offset
IRM 25.6.1	Statute of Limitations Processes and Procedures

(4) Specialty Accounts reports to the Program Manager of PPB.

(5) The office symbols for Specialty Accounts are SE:W:CAS:AM:PPB:SA.

IRM 1.1.13.7.3.4.2, Changed name from Business Master File (BMF) to Business Adjustments (BA), clarified BA purview.

(1) **Mission:** To support the mission of Accounts Management (AM) by developing policy, procedures, and guidelines for resolving and processing Business Adjustments (BA) related issues.

(2) To accomplish the mission, BA:

   a. Evaluates legislative changes, current policy decisions, process improvement suggestions, technical advances, and other sources to write or revise IRM procedures.
   b. Partners with applicable AM headquarters stakeholders on issues or suggestions impacting BA related programs.
   c. Coordinates activities related to IRM publishing and distribution; interacts with the Wage and Investment (W&I) AM IRM Coordinator and Media & Publications (M&P) to ensure requirements are met and proper layout of paper and electronic IRM pages; tracks field feedback on the IRM.
   d. Assists with training development efforts with RMT, Training and the Learning and Education (L&E) organization to ensure training is delivered using current materials.
   e. Develops IRM procedures for Employer Identification Number (EIN) assignment, business tax returns, BMF duplicate filing conditions, adjustments, Individual Master File (IMF)/BMF International, carrybacks, (IMF/BMF-International/Domestic), US Certifications, Tax Exempt and Government Entities (TE/GE) phone operations, as well as other AM telephone and paper programs related to business and certain individual adjustments.
   f. Reviews, evaluates, coordinates and responds to process improvement suggestions on assigned program responsibilities.
   g. Performs program reviews on assigned programs to ensure consistency and accuracy within the sites.
   h. Performs pre-coordination meetings with Information Technology (IT) counterparts, submits Unified Work Requests (UWRs) when necessary to update assigned programs. Also performs production testing and acts as W&I representation on IT coordinated pre and post release calls.

i. Prepares responses to audit findings from Treasury Inspector General for Tax Administration (TIGTA) and Government Accountability Office (GAO) reports related to all programs assigned to BA and provides guidance on audit follow-up responses; ensures necessary changes are implemented because of reports and findings.

j. Partners with Large Business and International (LB&I), Small Business/Self-Employed (SB/SE), TE/GE and Competent Authority on a regular basis to ensure seamless program delivery where policy is created by an operating division other than W&I for AM employees in the field.

k. Acts as SMEs for assigned programs in external stakeholder meetings with Information Reporting Program Advisory Committee (IRPAC), Internal Revenue Service Advisory Council (IRSAC), Social Security Administration (SSA), Census Bureau, and Quarterly Reporting Agent File (RAF) Conferences.

l. Performs technical review for accuracy as it relates to assigned programs including Technical Communications Documents (TCDs), Servicewide Electronic Research Program (SERP) stand-alone pages (Telephone Transfer Guide (TTG), Carryback 45-Day Interest Free charts, Sequestration, etc.,) and new or revised Integrated Automated Technologies (IAT) tools.

m. Provides guidance and coordinates cross functionally, if needed, to elevated cases from campuses on complex problems.

(3) Business Adjustments area of responsibility include:

a. Processing Reporting Agent File (RAF) Authorizations
b. Business filing 94X
c. Assigning Employer Identification Numbers (EINs), including Mod-IEIN
d. Carrybacks (IMF/BMF-International/Domestic)
e. Business duplicate filing conditions
f. Business income taxes
g. TE/GE telephone operations
h. General Correspondence guidance (IMF/BMF)
i. International (IMF and BMF)
j. US Certifications
k. Non-Master File (NMF) operations (IMF and BMF)
l. IRC 965 AM casework (IMF/BMF)
m. IRMs including:

IRM Number	IRM Title
IRM 21.3.3	Incoming and Outgoing Correspondence/Letters
IRM 21.3.8	Tax Exempt/Government Entities (TE/GE) Customer Account Services (CAS) Telephone Operations
IRM 21.3.9	Processing Reporting Agents File Authorizations
IRM 21.5.9	Carrybacks
IRM 21.5.13	965 Transition Tax Procedures-Accounts Management
IRM 21.7.1	BMF/NMF Miscellaneous Information
IRM 21.7.2	Employment and Railroad Tax Returns
IRM 21.7.3	Unemployment Taxes

IRM 21.7.4	Income Taxes/Information Returns
IRM 21.7.9	BMF Duplicate Filing Conditions
IRM 21.7.10	No-Merge Cases
IRM 21.7.11	Additional Computer Paragraph Notices and Transcripts
IRM 21.7.12	Non-Master File (NMF) Adjustments
IRM 21.7.13	Assigning Employer Identification Numbers (EINs)
IRM 21.8.1	IMF International Adjustments
IRM 21.8.2	BMF International Adjustments
IRM 21.8.4	United States Certification for Reduced Tax Rates in Tax Treaty Countries
IRM 21.8.5	Miscellaneous Foreign Investment in Real Property Tax Act (FIRPTA) Related Issues
IRM 21.8.6	Exemptions from US Withholding (Form 8233)

(4) Business Adjustments reports to the Program Manager of PPB.

(5) The office symbols for Business Adjustments are SE:W:CAS:AM:PPB:BA.

IRM 1.1.13.7.3.6.1, Added IRM 25.23.13, Identity Protection and Victim Assistance-Income Related Identity Theft to the list of IRM's Identity Theft Victim Assistance (ITVA) monitors.

(1) **Mission:** To develop policy, procedures, and guidelines for resolving individual taxpayer accounts upon contact from a victim of identity theft (IDT) or Return Preparer Misconduct (RPM). Identity Theft Victim Assistance (ITVA) issues guidance for researching accounts based on a return or claim from an apparent victim, correcting accounts when IDT or RPM is substantiated, and communicates with victims.

(2) ITVA supports the IDTVA campus operations, BMF IDT Teams, IDT, and the Taxpayer Protection Program (TPP) toll-free product line through:

- Oversight of IDTVA campus procedures and activities.
- Oversight of the toll-free IDT product line procedures.
- Collaboration with Return Integrity and Compliance Services (RICS) for the TPP toll-free line.
- Support Identity Protection Strategy and Oversight (IPSO)/Identity Protection (IP) activities within the scope of programs associated with victim assistance.
- Evaluation of legislative changes in current policy decisions, process improvement suggestions, technical advice, and other sources to write or revise IRM procedures.
- Support of the development and implementation of Business Master File (BMF) IDT and RPM procedures.

(3) To accomplish the mission, ITVA:

a. Writes and updates IRM 25.23 and IRM 25.24 as needed to enhance program efficiency and effectiveness. This includes updates related to legislative changes, system/process changes, continuous improvement initiatives, and input from the field or other stakeholders such as Compliance, Taxpayer Advocate Service, etc. Following the procedural change, ITVA monitors the implementation to determine potential impacts on program delivery.
b. Supports all activities identified by IPSO for programs associated with victim assistance.
c. Collaborates with and responds to audits from Treasury Inspector General for Tax Administration (TIGTA) and Government Accountability Office (GAO), providing guidance on audit follow-ups and ensuring necessary changes are implemented because of agreed-to findings.
d. Completes site reviews to gain employee feedback on program procedures and provides the site input on case reviews.
e. Works with IDTVA to reduce burden of the IDT/RPM victim and the employees in IDTVA.
f. Works with BMF AM to reduce burden of the BMF IDT victim and the employees in the BMF IDT teams.
g. Monitors and improves programs involving the following IRMs:

IRM Number	IRM Title
IRM 25.23.3	IMF Non-Tax-Related IDT and Specialized Programs
IRM 25.23.4	IDTVA Paper Process
IRM 25.23.10	Compliance Identity Theft Case Processing
IRM 25.23.11	Business Master File (BMF) Identity Theft Procedures for Accounts Management
IRM 25.23.12	IMF Identity Theft Toll-Free Guidance
IRM 25.24.1	Return Preparer Misconduct Victim Assistance - General Overview
IRM 25.24.2	Return Preparer Misconduct Victim Assistance Specialized Accounts Management Processing
IRM 25.23.13	Identity Protection and Victim Assistance- Income Related Identity Theft

(4) ITVA reports to the Program Manager of Identity Protection Strategy and Oversight.

(5) The office symbols for ITVA are SE:W:CAS:AM:IPSO:ITVA.

(6) Visit ITVA at: https://irssource.web.irs.gov/WI/Lists/AM/DispItemForm.aspx?ID=11.

IRM 1.1.13.7.3.8, New Section added Account Management Operation Support (AMOS). Created due to W&I realignment. Added AMOS mission and who reports to AMOS.

(1) **Mission:** To provide program support through data, analysis and quality process improvements to Accounts Management (AM) headquarters, field directorates and other business units.

(2) To accomplish the mission, the Account Management Operations Support (AMOS) staff:

   a. Consolidates and provides input related to Government Accountability Office (GAO), Treasury Inspector General for Tax Administration (TIGTA), and National Taxpayer Advocate (NTA) audits/reports (as needed).
   b. Monitors, tracks, and completes AM related action items resulting from executive level meetings/briefings.
   c. Provides administrative support for the Director and Deputy Director, AM including preparing responses to internal and external stakeholders, providing information, preparing presentations, preparing for meetings, etc.
   d. Foster an inclusive environment where everyone is valued, has a voice in the workplace and serves employees and the public with the highest level of ethics, integrity and excellence.
   e. Support Accounts Management (AM) programs by identifying collaborative organizational partners, coordinating resources strategically, and tracking improvement processes to help deliver results for America's Taxpayers.
   f. Provide program support and coordination to the other AMHQ teams.
   g. Coordinate and track Congressional Inquiries, Industry reach-ins, and internal inquiries.
   h. Coordinate and track Hear Me/ Customer Early Warning System (CEWS), New Legislation, National Telecommuting Institute (NTI) and Taxpayer Relations (TPR) action items. The Program Manager of AMOS serves as the Project Manager for the NTI contract.
   i. Consolidate information provided for Operational Reviews, Taxpayer Advocacy Panel Project Referral Program (TAP), Most Serious Problems (MSP), and Business Performance Review (BPR).

(3) The Program Manager of AMOS reports to the Director, AM and Deputy Director, AM.

(4) AMOS is comprised of the following teams:

   • Program Management and Coordination (PMC)
   • Process Improvement/Customer Accuracy (PICA)

(5) The office Symbols for AMOS are SE:W:CAS:AM:AMOS.

IRM 1.1.13.7.3.8.1, New Section added Program Management and Coordination (PMC). Created due to W&I realignment. Added PMC mission and how PMC will accomplish mission.

(1) **Mission:** To support Accounts Management (AM) programs by identifying collaborative organizational partners, coordinating resources strategically, and tracking improvement processes to help deliver results for America's Taxpayers.

(2) To accomplish the mission, Program Management and Coordination (PMC):

   a. Provides program support and coordination to the other Accounts Management headquarter (AMHQ) teams
   b. Coordinate and track the following:
      • Congressional Inquiries
      • Industry Reach ins
      • Internal (Exec Staff) Inquiries
      • Hear Me/Customer Early Warning System (CEWS) (AM)
      • New Legislation
      • Taxpayer Relations (TPR) action items
      • AM Inventory process improvements
   c. Consolidate information provided for data class for the following:
      • Op Reviews
      • Commissioner Updates
      • Taxpayer Advocacy Panel Project Referral Program (TAP)
      • Most Serious Problems (MSP)
      • Business Performance Review (BPR) request
      • Electronic Tax Administration Advisory Committee (ETAAC)
      • Internal Revenue service Advisory Council (IRSAC)
      • Questions For the Record (QFR)
   d. Coordinating volunteers from AM sites to the local offices for Taxpayer Experience Days.
   e. Coordinating the approval of AM topics, staff, and travel for National Taxpayer Forums (NTF) between AMHQ, CAS and C&L

(3) PMC reports to the Program Manager of AMOS.

(4) The office symbols for PMC are SE:W:CAS:AM:AMOS:PMC.

IRM 1.1.13.7.3.8.2, New Section added Process Improvement/Customer Accuracy (PICA). Previously found in IRM 1.1.13.7.3.1.3, PICA, Moved due to W&I realignment. Added PICA Mission and how PICA will accomplish mission.

(1) **Mission:** To provide quality and process improvement support to all Accounts Management (AM). Process Improvement/Customer Accuracy (PICA) analysts utilize and maintain the National Quality Review System (NQRS) and Evaluative Quality Review System (EQRS) Data Collection Instruments (DCIs) to achieve a set

level (goal) of phone and paper quality; providing statistical data, program support and trend analysis to improve customer accuracy and ensure the AM enterprise quality measures are met.

(2) To accomplish the mission, PICA:

    a. Provides clarification and guidance to the field directorates on procedural issues that improve work processes, quality and level of service for the taxpayer.

    b. Develops AM business unit and site level program quality targets.

    c. Measures and reports progress toward delivering program targets.

    d. Champions quality initiatives by providing guidance, oversight and training to the Process Improvement Specialists in the field.

    e. Monitors the implementation of new procedures to assess impact to program delivery.

    f. Monitors quality of AM telephone and paper inventory programs, identifies trends, and if necessary, advises site of changes required to deliver higher quality.

    g. Identifies and disseminates best practices to assist in meeting quality goals and improving performance.

    h. Serves as a liaison with Centralized Quality Review System (CQRS) and local Program Analysis System (PAS) quality reviewers to identify emerging issues and improvement opportunities.

    i. Serves as a liaison with the Centralized Evaluative Review (CER) team to identify emerging issues, improvement opportunities and to ensure consistency throughout the program.

    j. Participates in site assistance visits, providing reports, conducting focus interviews to identify improvement suggestions and initiating follow-up actions.

    k. Reviews and approves a valid sample of work for each AM program throughout the year with Statistics of Income (SOI).

    l. Serves as a liaison with Process Improvement managers and specialists at each AM site to conduct national product (program) quality reviews.

    m. Provides topics for training, skill-up, and improvement methods including the Define, Measure, Analyze, Improve Control (DMAIC) process.

    n. Conducts and/or assists with DCI Coding Consistency Training sessions for headquarters (HQ) and field tax and quality analysts.

    o. Shares sound recommendations with solid facts and figures to justify changes (procedural, systemic and program) to proper stakeholders such as Policy and Procedures IMF, Identity Theft (IDT), Return Integrity and Compliance Services (RICS), Field Assistance (FA), and Automated Collection System (ACS) to improve work practices, policies and guidelines.

    p. Recommends any changes that provide/improve consistency and/or enhance productivity and efficiency.

    q. Support delivery of EQRS Coding Consistency Training for AM sites to ensure CQRS, PAS, and CER coding is consistent. Conducts EQ Summits every two years to ensure EQRS DCI Coding eliminate low used coding attributes.

r.   Oversees the AM Customer Satisfaction (CSAT) Surveys (CSS), coordinating with Wage and Investment (W&I) Strategies and Solutions (WISS) and the vendor to ensure each AM Senior Manager and Field Director receives CSS Reports with improvements recommendations.

(3) PICA reports to the Program Manager of AMOS.

(4) The office Symbols for PICA are SE:W:CAS:AM:AMOS:PICA.

Editorial changes made throughout the IRM including:

- **Updated office symbols and links to functional web pages as available.**
- **Corrected capitalization, typos, grammar, etc.**