MANUAL TRANSMITTAL

1.4.61

Department of the Treasury
Internal Revenue Service

APRIL 27, 2023

EFFECTIVE DATE

(04-27-2023)

PURPOSE

(1)   This transmits revised IRM 1.4.61, Resource Guide for Managers, Automated Collection System Guide for Managers and Systems Analysts.

MATERIAL CHANGES

(1)   IPU 22U0840 submitted 07-28-2022 IRM 1.4.61.1.5 Updated to replace OL5081 with BEARS

(2)   IPU 22U0840 submitted 07-28-2022 IRM 1.4.61.6.2 Updated to replace OL5081 with BEARS

(3)   IPU 22U0840 submitted 07-28-2022 IRM 1.4.61.8.1 Updated to replace OL5081 with BEARS

(4)   IPU 22U0840 submitted 07-28-2022 IRM 1.4.61.10.5 Updated to re place OL5081 with BEARS and revised guidelines for securing access

(5)   IPU 22U0840 submitted 07-28-2022 IRM 1.4.61.2 Updated Retention (risk) Categories and Priority Codes

(6)   IPU 22U0840 submitted 07-28-2022 IRM 1.4.61-8 Updated mailing address for Fresno Support site

EFFECT ON OTHER DOCUMENTS

IRM 1.4.61 dated December 16, 2020 is superseded.

AUDIENCE

Small Business/Self Employed (SB/SE)

Erick Martinez,
Director, Collection Inventory Delivery and Selection

1.4.61

Automated Collection System Guide for Managers and Systems Analysts

Table of Contents

1.4.61.1 (12-16-2020) **Program Scope and Objectives**	(1)	**Overview:** This IRM provides guidance on process and procedures for managing systems related to answering taxpayer telephone calls in Compliance. It provides general operational objectives, various techniques, methods, and guidelines for managing the call center. The IRM should be used in conjunction with other guidelines provided by call center management and staff, the business operating division (BOD), and the Joint Operations Center (JOC) and is not intended to circumvent established lines of authority. Additionally, this IRM is not intended to supersede negotiated agreements. Some subsections are directed to a specific operation identified in the subsection title.
	(2)	**Purpose:** Management and the telephone system staff (TSS) works with the BOD and JOC to effectively manage the call center systems and staffing.
	(3)	**Audience:** The primary users of this IRM are Management and the telephone system administrators and analysts in the call sites and the BOD analysts.
	(4)	**Policy Owner:** Director, Collection Inventory Delivery and Selection (CIDS)
	(5)	**Program Owner:** Director, Collection Inventory Delivery and Selection (CIDS), Automated Collection System, Systems and Inventory (ACSSI).
	(6)	**Primary Stakeholders:** ACS.
	(7)	**Program Goals:** This IRM will provide guidance for managers, telephone system administrators and analysts to effectively manage the call center systems and staff to meet the business goals of the organization
1.4.61.1.1 (12-16-2020) **Background**	(1)	This IRM section outlines the expectations and duties of an ACS manager based on their level in management. For the telephone system staff, the section outlines their duties with system maintenance, site telephone schedules, monitoring of telephone staff delivery and consultation with management on telephone staffing issues.
1.4.61.1.2 (12-16-2020) **Authority**	(1)	CFR Part 2635, Standards of Ethical Conduct for Employees of the Executive Branch.
	(2)	IRM 1.2.1.6, Policy Statements for Collecting Process Activities, related to this section include:

- Policy Statement 5-1, Enforcement is a necessary component of a voluntary assessment system
- Policy Statement 5-2, Collecting Principles
- Policy Statement 5-71, Reporting accounts receivable as currently not collectible
- Policy Statement 5-133 Delinquent returns - enforcement of filing requirements

	(3)	The IRS Restructuring and Reform Act of 1998 (IRS RRA 98), Section 3705(a), provides identification requirements for all IRS employees working tax related matters.
	(4)	The IRS adopted the Taxpayer Bill of Rights (TBOR) in June 2014. Employees are responsible for being familiar with and acting in accordance with taxpayer

rights. See IRS 7803(a)(3), Execution of Duties in Accord wit Taxpayer Rights. For additional information about the TBOR, see *https://www.irs.gov/taxpayer-bill-of-rights*.

1.4.61.1.3 (12-16-2020) **Roles and Responsibilities**	(1) This section will outline the roles and responsibilities for Automated Collection System (ACS) managerial staff and telephone system staff. There will be specific IRM sections to outline these different responsibilities for these roles. The manager section will provide guidance for all levels of management in ACS. The telephone system staff section will provide guidance for all positions within a System Support team.

1.4.61.1.4 (12-16-2020) **Program Management and Review**	(1) **Program Reports:** Section 1204 reports. Managers are required to submit quarterly certifications of compliance with section 1204 of the Internal Revenue Service Restructuring and Reform Act of 1998, prohibiting the use of tax enforcement results. Daily and weekly reports are performed by management. Headquarters gathers monthly data to communicate targets and objectives.

(2) Managers are required to manage work programs and perform program and employee reviews to ensure Compliance work is completed according to procedural guidelines contained in applicable IRMs.

(3) Program management and review guidelines are detailed in IRM 1.4.20.5.

(4) The following reports assist with management controls:

- Embedded Quality Review System (EQRS) Reports
- National Quality Review System (NQRS) Reports
- Accounts Management Services (AMS) Reports
- Overage Report Compiler and Sorter (ORCAS)
- ACS Reports
- Monthly Monitoring Report (MMR)
- Work Planning and Control (WP&C) Reports
- Case Control Activity System (CCA) Report
- Collection Activity Report (CAR)

(5) Program objectives for phones are compiled by the JOC and reported on the JOC Web page. These reports are frequently reviewed and discussed at various levels of the organization, including BOD directors, BOD analysts, and site management.

(6) **Program Effectiveness**: Program goals are measured against guidelines contained in the BOD program letters and established BOD business measures for each fiscal year.

1.4.61.1.5 (04-27-2023) **Program Controls**	(1) Restructuring & Reform Act of 1998 (RRA 98), Section 1204, prohibits the use of records of tax enforcement results to evaluate employees, impose or suggest production quotas or goals with respect to such employees. This applies to all employees regardless of position held or location in which the work is performed. For purpose of implementing this section, IRM 1.5.1, The IRS Balanced Measurement System, refers to employees exercising judgment in determining tax liability or ability to pay as "**Section 1204 Employees.**"

(2) IRS has access control measures in place to provide protection from unauthorized alteration, loss, unavailability, or disclosure of information. These access controls are developed according to assigned user duties, i.e., telephone

agents, managers, telephone system analyst, or headquarters analyst. Systems users are required to obtain On-Line Business Entitlement Access Request System (BEARS) permissions to access servers and programs, i.e., Contact Recording, Account, Management Service (AMS), Automated Lien System (ALS),Unified Contact Center Enterprise (UCCE), Aceyus, and E-Workforce Management (eWFM).

(3) Information is available from system reports to monitor the efficiency of telephone staff and performance of telephone systems staff. Some of the most common reports and report systems include:

- Enterprise Telephone Data (ETD) reports
- Aceyus reports
- Agent Activity Report
- Sign On/Sign Off Report
- Ready Report
- Agent Transfer Report
- eWFM reports

**1.4.61.1.6
(12-16-2020)
Terms/Definitions/
Acronyms**

(1) The following table lists commonly used acronyms and their definitions:

Acronym	Definition
AAB	Aggregate Assessed Balance
ACD	Aspect Automated Call Data
ACS	Automated Collection System
ACSS	Automated Collection System Support
AHT	Average Handle Time
AMC	Alternative Media Center
AMS	Account Management Services
AO	Accessibility Office
APM	Administrative Procedures for Managers
ATTS	Automated Time Tracking System
AWOL	Absent without Leave
AWSS	Agency-Wide Shared Services
BD	Balance Due
BMF	Business Master File
BOD	Business Operating Division
BRP	Business Resumption Plan
CAC	Chief Accessibility Coordinator

Acronym	Definition
CAP	Collection Appeal Program
CDP	Collection Due Process
CJE	Critical Job Element
COBR	Campus Operation Business Results
CPE	Continuing Professional Education
CQRS	Centralized Quality Review System
CR	Collection Representative
CSS	Customer Satisfaction Survey
CTDWA	Control-D Web Access
CUIC	Cisco Unified Intelligence Center
DCI	Data Collection Instrument
DOJ	Department of Justice
EEOD	Equal Employment Opportunity and Diversity
ELITE	Enterprise Logistics Information Technology
EONS	Electronic On-line Network
EPF	Employee Performance Folder
EQ	Embedded Quality
EQRS	Embedded Quality Review System
ER/LR	Employee Relations/Labor Relations Skill for Managers
ESP	Employee Suggestion Program
ETA	Electronic Tax Law Assistance
EUP	Employee User Portal
FLRP	Front-line Leader Readiness Program
FMLA	Family and Medical Leave Act
FR	Financial Review
FTE	Full-Time Equivalent
FUNCO	Functional Coordinator
FUTA	Federal Unemployment Tax Act

Acronym	Definition
ICP	Integrated Case Processing
IDRS	Integrated Data Retrieval System
IRM	Internal Revenue Manual
ISD	Information System Division
ITM	Integrated Talent Management
IUP	Infrastructure Upgrade Project
JOC	Joint Operation Center
LAC	Local Accessibility Coordinator
LEM	Law Enforcement Manual
LWOP	Leave Without Pay
LWSB	Lions World Services for the Blind
MAAG	Month at a Glance
MFT	Master File Tax
MIS	Management Information Statistics
MITS	Modernization Information Technology & Security
NCD	Non-Competitive Detail
NMF	Non-Master File
NQRS	National Quality Review System
NTEU	National Treasury Employees Union
OEP	Occupational Emergency
OFP	Organization Function Program
OJI	On-The-Job Instructor
P&A	Policy and Analysis
PMS	Performance Management System
POA	Power of Attorney
QMF	Query Master File
RAC	Reasonable Accommodation Coordinator
RACF	Resource Allocation Control File
RCA	Reasonable Cause Assistant

Acronym	Definition
RD	Return Delinquency
ROTERs	Records of Tax Enforcement Results
RRA 98	Restructuring and Reform Act of 1998 (Law)
RTA	Real Time Adherence
RTC	Resource Training Coordinator
RTR	Remittance Transaction Research
SAFE	Security Awareness for Employees
SERP	Servicewide Electronic Research Program
SSO	System Security Officer
TAO	Taxpayer Assistance Order
TBOR2	Taxpayer Bill of Rights 2
TEACH	Temporary Employee Action Code History
TERs	Tax Enforcement Results
TIGTA	Treasury Inspector General for Tax Administration
TIN	Tax Identification Number
TMT	Tax Motivated Transactions or Temporary Manager Training
TQM	Total Quality Measurement
TRIS	Telephone Routing Interactive Systems
UNAX	Unauthorized Access
UTC	Unable to Contact
UTL	Unable to Locate
UWR	Unified work Request
VMS	Voice Messaging System
WP&C	Work Planning & Control

(2)   Complete lists of commonly used terms and their definitions are contained in IRM 1.4.21.6, Glossary, for non-eWFM terms and IRM 1.4.21.7 , eWFM Glossary, for eWFM terms

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1.4.61.1.7
(12-16-2020)
Related Resources

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(1) When using this chapter to perform your daily duties, it may be necessary to use other resources listed below:

- IRM 1.5.1, IRS Balanced Performance Measurement System
- IRM 5.19, Liability Collection
- IRM 6.451, Employee Performance and Utilization
- IRM 13, Taxpayer Advocate Service
- IRM 21, Customer Account Services

(2) The following is a list of the primary sources of guidance for telephone system operations:

- :*Accounts Management (AM) BOD Web site*
- :*Compliance BOD Web site*
- *Joint Operations Center Web site*:
- *AM Field SharePoint site*
- BOD annual program letter provided on each BOD Web site: the program letter provides specific guidelines, goals and strategies used to ensure consistent telephone and inventory program delivery and offers assistance and guidance to the sites as they create their strategic and operational goals
- Memorandum of Understanding (MOU) covering Customer Service Operations between Internal Revenue Service and National Treasury Employees Union (NTEU), also known as the Customer Service Agreement (CSA): the CSA applies to all bargaining unit employees assigned to campus and remote sites and is intended to enhance taxpayer service and business efficiency by taking full advantage of changes in technology, while at the same time promoting employee satisfaction
- *Vendor-provided user guides for telephone-related systems*

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1.4.61.2
(04-27-2023)
Case Routing and Selection

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(1) The work priority and selection process is designed to ensure that cases are selected with integrity and fairness.

(2) Work priority generally falls into two categories; immediate (customers calling in) and delayed (inventory processing) demand. Cases in the immediate demand category have the same priority for selection whereas inventory work selection uses a priority scheme.

(3) Work selection is based on a combination of factors such as case priority, current organizational program needs, and available staff. Case selection generally occurs as shown below.

(4) Systemic Processes:

a. FERDI and Non-FERDI /FPLP – no limits are placed on these systemic processes.
b. ACS systemic levies and letters – limited as part of the phone demand forecast prepared by the SB/SE HQ Collection Joint Operations Center (JOC) liaison staff.

(5) Calls from taxpayers requiring assistance to resolve their accounts.

(6) Use the table below to identify types of inventory work maintained by various work factors:.

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Inventory Work Factors	Types of inventory account work
Priority Programs	• IMF-FERDI • HINF • International • Payroll Trust Fund Taxes • General Programs (Non-FERDI IMF, non-trust fund, etc.)
Work Categories (determined by function/unit assignment) See IRM 5.19.5.4.9, ACS Case Inventory	• Enforcement • Research • Investigation
Retention (or risk) Categories and ACS Priority Codes	• Retention Categories are A-Z (A= highest priority) • Priority Codes 0-99 (0 = the highest priority)

(7) To ensure adequate case coverage, cases with the oldest expired follow-up date are selected first.

1.4.61.3
(12-16-2020)
ACS Managers Responsibilities

(1) **ACS Call Site or Operations Managers:** Provide general oversight to ensure approvals are done promptly.

(2) **ACS Call Site Team Managers:** should take the following actions on a daily basis:

• Address your own employee's cases requiring approval and ensure your employees are making case prints when approvals are required or a query/listing process is used.
• Address cases remaining in the zero functions by working through the managerial approval inventory assigned to your team using next case access. If the work is correct, approve the case or if it can be resolved with a simple input, that action should be taken without referring the account
• Address work done by another Call Site employee that is not correct and/or cannot be resolved by providing your Call Site's ACS managerial approval process contact person with the TIN, the employee ID, and the date moved to the managerial function (or Screen 1 print). The information will be forwarded daily to the Call Site of the employee taking the case action for appropriate follow-up. Please DO NOT forward cases that you can correct easily.

1.4.61.3.1
(12-16-2020)
ACS Managerial Approval Process

(1) **ACS Employee's Responsibility:** With nationwide call routing (Enterprise) , we process accounts residing in other ACS Call Sites inventories, so case prints or other action is required to inform the manager that an approval is needed. ACS employees taking the following actions must inform their manager of the need to review and approve the case when it is moved to the managerial inventory (C0, R0, I0, or S0).

(2)   There is a systemic check that prevents non-managers from inputting these approvals on ACS. Other actions that either initiate or cease collection activities may require managerial approval as well.

(3)   Procedures may be established locally to require managerial approval of other actions, but there will be no systemic checks to ensure this.

1.4.61.3.2
(12-16-2020)
ACS Managerial
Approval Actions

(1)   Any disposition requiring approval on **an account residing on a different Call Site's inventory.** See IRM 5.19.5 ,ACS Inventory.

(2)   **Levy / Lien Action:**

- Any manual levy IRM 5.19.4.3.11(8)
- Levies on Social Security income IRM 5.19.4.3.12(7)
- Levies or liens issued while pending an appeal or IRM 5.19.8.4.6, "Equivalent Hearing"
- Lien filing on AAB less than $10,000 IRM 5.19.4.5.2(9)
- Decision not to file a lien on AAB over $10,000 IRM 5.19.4.5.3.4(1)

(3)   **Installment Agreement Dispositions**

- Above streamlined criteria, including liens filed because the taxpayer is not able to full pay within 60 months or defaulted within the past 12 months IRM 5.19.1.6.4.8
- PPIA IRM 5.19.1.6.5.2

(4)   **Currently Not Collectible Dispositions**

- Certain hardship cases warranting currently not collectible closings IRM 5.19.17.2.4
- Decedent, UTL and UTC with AAB over $10,000 IRM 5.19.17.2.6 I
- CNC on defunct/insolvent corporations IRM 5.19.17.2.7

(5)   **Return Delinquency Dispositions**

- Little or no Tax due except 6+ year old mods IRM 5.19.2.6.4.6.2(5) I
- HINF Closures IRM 5.19.2.8.12
- ASFR Referrals (**W&I Only**, 25 percent of referrals require approval) IRM 5.19.2.6.4.6.4 I

(6)   **Request for Appeal,** Collection Appeal Program (CAP) IRM 5.19.8.4.16.4(2)I

(7)   **Referrals to Examination or Criminal Investigation** - R3 Inventory IRM 5.19.5.7.3.1I

1.4.61.3.3
(12-16-2020)
ACS Managerial
Approval Contact
Person's Responsibility

(1)   Inform the other ACS Call Sites of cases in your site's managerial approval inventories that require additional attention prior to closure via fax promptly. Your site's team leaders will provide this information. Promptly resolve or direct cases identified by other Sites as needing additional work to the appropriate team manager for follow-up. To ensure that information is properly transmitted, verify that the fax was sent successfully. The contact person will enter AMS comments on cases (both the person sending the account and the person responding in the originating site) to clearly record actions taken.

(2) If the referred account has not been resolved after two attempts, contact the managerial approval fax contact person in the receiving site by phone or secure e-mail (if the site accepts this type of transmission) to resolve the outstanding issue promptly. Local practice will be followed to elevate the issue if the account remains unresolved after that contact.

1.4.61.4
(12-16-2020)
ACS Systems Analysts
Roles and
Responsibilities

(1) The role and responsibilities of a system administrator (analyst) are as follows:

- Ensuring system is properly configured to meet organizational and operational objectives;
- Maintaining a trouble log to monitor response time problems, circuit problems, unusual staffing situations (snow days, building closures, etc.) or any other factor which could distort telephone data and affect circuitry or staffing plans;
- Ensuring circuitry meets standardization requirements;
- Adhering to schedule;
- Checking the Automated Collection System/Integrated Collection System (ACS/ICS) Parameter File for the correct date and cycle;
- Reviewing the reports that are generated from the system to determine if the operation is achieving its goal and identify system problems that may exist within the system;
- Distributing ACS/ICS and QMF Reports to appropriate managerial levels, providing assistance to managers and employees, and creating user profiles and assigning passwords;
- Checking voice disk space;
- Printing and reviewing Telephone Routing Interactive Systems Management Information Statistics (TRIS MIS);
- Monitoring agents for long wrap and idle times as needed;
- Analyzing systems impact resulting from Headquarter office maintenance, TRIS Project Office Master Customer Service Script changes, etc.;
- Advising Operation management and facilitate implementation with involved parties;
- Instructing site employees on new features and procedures and troubleshoot system and equipment problems resulting from changes;
- Creating QMF and Aceyus reports as requested by the Operation Manager.

1.4.61.5
(12-16-2020)
ACS System Extract

(1) Each site should have Query Master File (QMF) extracts to allow for a complete picture of the status of inventories in the site. Those extracts should be requested as needed or on a regular basis and be reviewed by the appropriate level of management to look for possible inventory issues or problems.

(2) Systems Analysts have the ability to create, modify and run extracts

(3) Extracts should be reviewed for various reasons, including but not limited to:

- Age of the inventory related to past follow-up dates in each inventory,
- Inventory levels in conjunction with priority case definitions,
- Closures and new inventory receipts on a weekly basis.

(4) Operation management should identify inventories beyond the time-frames established in IRM IRM 5.19 ,Liability Collection, as well as from Headquarter Operations, and take immediate steps to resolve the situation(s). Some possible solutions include:

a.   Reassignment of work among other operation employees,
b.   Consideration for overtime,
c.   Consideration of details from other functions.

(5)   Next level management and Headquarter Operations should be notified when
inventory is beyond the established guidelines.

1.4.61.5.1
(12-16-2020)
Managers Menu

(1)   The ACSWeb Manager Menu consists of the following tables:

Title	Description
Daily Workload (MR00)	Table allows managers to run reports by site, function, team/ function or search with no criteria for results by team
Teach List (ER00)	Table allows managers to run reports on cases worked by team or employee ID number
Employee Summary Report (ES00)	Table allows managers to run reports for time statistics using employee ID number
Parameter File Maintenance (PM00)	Table allows managers to view various parameter table that were set up by Analysts to take systemic actions on ACS accounts
Team Assignment (TA00)	Table used to add or delete various inventories by site
Employee List by Name (EMPL)	Table allows search for employees by various criteria such as site, RACF, Name
Time Statistics Report (TS00)	Table allows managers to run reports by various criteria such as: Employee Case Summary, Call site and Support site
Security Maintenance (SM00)	Table managers can view that displays the Security Mainte-nance screen which maintains security information on employees .
Management Reports (RP00)	Table allows managers to extract reports based on various criteria such as National, BOD, Team, Site/Support site

1.4.61.5.2
(12-16-2020)
National Office Menu

(1)   The ACSWeb National Office Menu consists of the following tables:

Title of Table	Description of Table
Levy Source Priority Table (PL00)	Table allows user to add different types of levy source documents by completing various fields. Use guidelines in IRM 5.19.4, Enforcement Action, to input valid sources
Batch Action Request (BA00)	Table is used by Analysts to systemically close cases based on various criteria and obvious results
National Inventory (NI00)	Table displays Inventories assigned to various sites
Parameter File Maintenance (PM00)	Table is used by Analysts to set up various systemic actions from the ACS database such as issuing letters or levies
Restriction by Profile (RS00)	Table is used by Analysts to restrict access to various inventories by ACS profile
Business Priority (BP00)	Table lists inventories by business priority and Consolidated Decision Analytics (CDA) score
Levy Source Deletion (LD00)	Table is used by Analyst to systemically delete levy sources by batch
Disaster Assignment Table (DA00)	Table is used by Analysts to set up systemic letter issuance for disaster cases
Special Inventory Assignment (SI00)	Table is used by Analyst to set up various inventories for distribution to specific sites
National Site Table (NS00)	Table is used by Analyst to change or add call site information
Levy Source Block (LB00)	Table lists levy sources that are blocked from being added to the ACS database example: State Refunds

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(12-16-2020)
Levy Review Menu</td><td>(1)</td><td>The ACSWeb Levy Review Menu contains the following tables:</td></tr>
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Title of Table	Description of Table
Summary Levies Processed (LR00)	Table used by Analysts to run reports of volumes of levies processed by specific Support site
Inventory Worked by TE (LI00)	Table allows analysts to run reports of inventory worked by a specific employee
Levy Review Inventory for Site (LS00)	Table used by Analysts to run reports of levy review inventory by Support site or BOD
National Office Levy Review (LN00)	Table used by Analysts to run reports by date and site or category

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(12-16-2020)
Resource Allocation File (RACF)</td><td>(1)</td><td>The ACS security system exists in the appropriate campus and is used to control access to the ACS host system. To add or remove users from the ACS system the following steps must take place:</td></tr>
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a. The ACS employee must complete an online Form 5081 request. These are routed through the appropriate channels for management approval and then routed to the security office at the campus. The security office issues a RACF user number for all new employees.

b. Following issuance of the RACF user number, the ACS systems analyst will create a temporary RACF password.

c. The RACF user member is entered on the ACS Security Maintenance Screen (SMOO) with the appropriate team, function and unit.

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(12-16-2020)
Profile Resume Procedures</td><td>(1)</td><td>This process is utilized to specify that a user is to be allowed access to the system again. The analyst would normally use RESUME to restore a users access to the system that has been revoked by:</td></tr>
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- Three consecutive unsuccessful password/log in attempts
- A prior REVOKE command

(2) You can assign a new entry password and RESUME the profile at any time. See Exhibit 1.4.61-2 detailed instructions. Always remember to do the following:

- DISPLAY the user before resuming that user. See Exhibit 1.4.61-1 for detailed instructions.
- Verify the appropriate action is taken on the correct user.

1.4.61.6.2 (04-27-2023) **Profile Revoke Procedures**	(1) When an employees profile is "**REVOKED**", this specifies that RACF is to prevent a user from accessing the system. The users profile and DATA SETS are not deleted. The user cannot access the system, and the employee will be denied access at their next log in attempt.

(2) A user should always be "**REVOKED**" if detailed to another position for 30 days or more.

(3) If a user no longer needs ACS/ICS access DELETE the user by completing a BEARS request..

Note: Remember to "**DISPLAY**" the user id before revoking or resuming and verify that the appropriate action is being taken on the correct user. See Exhibit 1.4.61-1 for detailed instructions.

1.4.61.7 (12-16-2020) **ACS Security**	(1) The ACS application is subject to Federal Information Security Management Act (FISMA) and Cybersecurity guidelines which requires annual testing of the application to ensure security guidelines are maintained. In addition, annual disaster recovery testing is completed to ensure the system can be recovered should a disaster occur. ACS HQ participates in theses annual tests on behalf of the business to provide evidence of compliance to security requirements

(2) The ACS application is two tiered which requires user to have a valid RACF ID, ACS User ID and a password to access. The ACS application has a systemic process to inactive RACF IDs after 45 days of inactivity then delete them after 90 days. ACS HQ receives daily reports of users meeting the deleted criteria then inactivates the ACS ID on these accounts. ACS HQ notifies the site SA staffs weekly of the accounts that have been deleted. In addition, since ACS also provides access to external customers such as TAC offices and TAS, ACS HQ also deletes these accounts based on the daily reports and notifies the areas.

(3) The process of granting access to the ACS system uses a multi-step approval process. This ensures that only users who have a business need to obtain access to the ACS system are granted the correct permissions. To protect system integrity and taxpayer information the Online 5081 process has three levels of approval at the site. The first level is for the employee to request access, the second level is for manager approval, and the third level is for the system office SA approval. This process was setup to conform to FISMA and Cybersecurity procedures which operate under three primary principles

- Separation of duties – separate levels to ensure that the request for access are reviewed by more than one person.
- Least Privileged Access – employees should be granted the lowest level of permission necessary to perform their required duties.
- Accountability – audit trails that ensure that Agency has taken steps to protect taxpayer information from unauthorized access.

1.4.61.7.1 (12-16-2020) **System Security Responsibilities**	(1) System's management begins with the establishment of the Security database for IDRS, ACS and the Resource Allocation Control File (RACF). Information input to the Security database authorizes employees to use the system and keeps track of employee information for reporting purposes.

Note: System's management begins with the establishment of the Security database for IDRS, ACS and the Resource Allocation Control File (RACF).

Information input to the Security database authorizes employees to use the system and keeps track of employee information for reporting purposes.

(2)   For ACS security, refer to IRM 5.19.5.2

(3)   For security purposes, perform the following tasks:

- Prepare written instructions to users and conduct training to promote overall system security;
- Maintain a current and historical master record of all control numbers, ACS, and IDRS users within the call-site;
- Maintain a complete listing of all call site hardware;
- Maintain system-wide records concerning security on the parameter file;
- Perform periodic reviews of IDRS command code profiles with managers to ensure that employees have only those command codes that are required to complete the job;
- Assure that profile change requests are appropriate and meet security criteria;
- Monitor security reports;
- Ensure that RACF and IDRS security violations are identified and appropriate remedial actions are taken
- Inform the operation of continuing violations and provide appropriate documentation
- Maintain appropriate records of security violations.

1.4.61.7.2
(12-16-2020)
Quarterly Certifications

(1)   Call Center SAs are required to perform quarterly certification of active ACS users. These reviews protect the integrity of the ACS system by ensuring that only authorized users have access. This is action required for all ACS Centers regardless of the number of profiles. After the review, a signed quarterly certification document must be submitted to HQ no later than 28 days after the end of the quarter.

1.4.61.8
(12-16-2020)
ACS Reporting QMF

(1)   Telephone Systems Analysts (TSA) can use the Query Management Facility (QMF for Windows) desktop application to query for information and create reports for ACS. QMF offers multiple interfaces, (build, prompted, or SQL) to help users build queries based on their skill level. TSAs can query most fields in the ACS database for open and closed cases. An ACS data dictionary provides the definitions of each field and can be used to assist with creating queries. The ACS Data Dictionary is stored on the ACSSI Systems Analyst (SA) SharePoint site.

Note: For account related queries/reports, the ACS Case Reference Number (CRN) should be used in lieu of the TIN. The CRN allows users to access taxpayer accounts assigned to ACS and was created to protect the privacy of taxpayers' accounts.

1.4.61.8.1
(04-27-2023)
Securing Access

(1)   TSAs will automatically have access to QMF through the approval of the BEARS "PROD SA (SRP) 'site' ACS "application (where 'site' is the call site location). Upon approval, TSAs shall submit an OS GetServices ticket for IT to install QMF for Windows. After QMF has been installed, users will need to import an "*.ini "file to configure QMF. Job aids and training material are

located on the ACSSI Customer SharePoint. The site contains instructions for importing the "*.ini" file, configure QMF, and creating personal workspace.

1.4.61.8.2 (12-16-2020) **ACS QMF Reports**	(1)	To assist TSAs with site operations, the ACSSI group creates and uploads queries to the SA SharePoint site. These queries include:

- ACS ACCESS – displays list of Active users on the ACS system
- APPROVAL – Approval cases sent by the site's employees that needs to be worked
- APPROVAL AGED – Site approval inventory that will be aged at the end of the week
- CASES WORKED BY _EMPLOYEE – Cases worked by Operators (O profile) not signed into I9
- CASES WORKED BY SITE – Count of cases worked by Operators (O profile) not signed into I9 (incoming calls)

1.4.61.9 (12-16-2020) **Telephone Systems**	(1)	Follow IRM 1.4.20.29, ACS Telephone Program and System Reports.
1.4.61.9.1 (12-16-2020) **Predictive Dialer**	(1)	Follow IRM 1.4.20.18, Workload Management, Outgoing Call Program that makes outgoing call on ACS cases.
1.4.61.9.2 (12-16-2020) **Phone System (UCCE/CTIOS/UIP)**	(1)	Follow IRM 1.4.21.2.3, Best Practices, and job aids for management of the UCCE Call Sites.
1.4.61.10 (12-16-2020) **Other Systems or Applications**	(1)	Other systems and applications are used by the ACS program as follows:

- Account Management Systems (AMS)
- Employee User Portal (EUP)
- eWorkforce Management (EWFM)
- E-Leave
- E-Gain (ACS Text Chat)
- Automated Time Tracking System (ATTS)

1.4.61.10.1 (12-16-2020) **Security**	(1)	Follow IRM 1.4.20.16.4, Security, for managers' responsibilities for managing employees' ACS, IDRS AND AOIC profiles.
1.4.61.10.2 (12-16-2020) **Account Management Systems (AMS)**	(1)	Follow IRM 1.4.20.18.4, Accounts Management Services, for guidance on AMS access, management tools and AMS reports.
1.4.61.10.2.1 (12-16-2020) **Employee User Portal (EUP)**	(1)	Follow IRM 1.4.18.8.1.2, Roles in the Employee User Portal.

1.4.61.10.3 (12-16-2020) **eWorkforce Management (EWFM)**	(1)	Follow IRM 1.4.21.4, eWFM for guidance on the eWorkforce Management application.
1.4.61.10.4 (12-16-2020) **E-Leave**	(1)	Follow IRM 1.4.21.2.1, System Analyst Roles and Responsibilities for E-Leave.
1.4.61.10.5 (04-27-2023) **E-Gain (ACS Text Chat)**	(1)	ACS Text chat uses the E-Gain application as the Hub to manage interactions with customers. Channels use a common desktop, knowledge base, customer history and business logic.
	(2)	Access to the E-Gain application is secured by submitting a BEARS request for the Prod User TDC Chat SBSE (Taxpayer Digital Communications) application based on access needed. Requests should include name, position, SEID, Badge number, shift and whether the user is bilingual.
1.4.61.10.6 (12-16-2020) **Automated Time Tracking System (ATTS)**	(1)	Follow IRM 1.4.21.2.1, System Analyst Roles and Responsibilities for ATTS.
1.4.61.11 (12-16-2020) **Workplans and Staffing**	(1)	The ACS work planning process begins with labor review resource funding estimates provided by the Finance Office. Finance builds their analysis on:

     a.   Current staff on-rolls counts as of certain pay-periods
     b.   Expected future hiring
     c.   Projected attrition and unpaid leave factors

(2)   Once Finance provides these resource needs estimates in terms of Full-Time Equivalent funding (FTE), Collection Planning and Performance Analysis (PPA), works with ACS Headquarters, JOC and Campus Collection to establish assumptions and set ACS Enterprise level targets for the upcoming fiscal year.

(3)   Assumptions and targets are established at the ACS Enterprise level based on history and known changes that will affect business results and include:

     a.   Direct time – expressed as a percentage of total time ACS expends on taxpayer service and supporting activities
     b.   Phone time – expressed as a percentage of total time ACS expends handling taxpayer phone calls
     c.   Telephone level-of-service (LOS) – the percent of total calls ACS expects to answer based on JOC projected call volumes for the upcoming year, total ACS FTE and projected phone hours
     d.   Balance Due (TDA) and Return Delinquency (TDI) case closures
     e.   Customer Accuracy – expectations are based on past National Quality Review Service (NQRS) results

(4)   ACS work plan resources are allocated to three planning periods; October – December, January – June, and July – September.

(5)   While work plan resources are allocated to the ACS sites based on each site's staff levels, most work-plan targets remain at the Enterprise level.

(6)   Campus Collection staff and Directors may choose to set Directorate level targets such as a direct time target based on the ACS Enterprise level target.

(7)   ACS Headquarters monitors proper function and program usage as well as ACS performance against plan and periodically make recommendations to Campus Collection and the ACS sites based on their analysis.

(8)   More information about the overall Campus Collection Work Plan Process is contained in IRM 1.4.20.5, Work Plans and Staffing.

1.4.61.12
(12-16-2020)
ACS Quality

(1)   Follow IRM 1.4.20.25, Quality for guidelines on the Quality Measurement Process, Role of Centralized Quality Review (CQRS) and Program Analysis System Reviewer (PAS), EQRS/NQRS Standard Reports and Role of the Campus Analyst.

1.4.61.13
(12-16-2020)
ACS Training

(1)   Follow IRM 1.4.20.22, Training and Employee Development for guidance on Core Training, ACS Interactive Training, On the Job Training and Training for All Employees.

Exhibit 1.4.61-1   (12-16-2020)
Actions to Display a User on ACS

To **DISPLAY** an employee on ACS to see if they are **REVOKED** take the following actions:

AT YOUR IAP SCREEN

1.   *Type* **Logon**
2.   *Hit* **Space Bar**
3.   *Type your* **RACF ID**
4.   *Hit* **Control**
5.   *Type in your* **Password**
6.   *Hit* **Control**
7.   *When you see *** hit* **Control** *again*
8.   *Type in* **TSO**
9.   *Hit* **Space Bar**
10. *Type* **ALU**
11. *Hit* **Space Bar**
12. *Type in* **Employees' RACF ID**
13. *Hit* **Control**

If your screen looks like this **(see example below)** before you hit your final **Control** you are correct.

- **Example:** TSO LU J955555

Exhibit 1.4.61-2   (12-16-2020)
Actions To Resume a User on ACS

To **RESUME** an employee on ACS that has been **REVOKED** take the following actions:

AT YOUR IAP SCREEN

1.   *Type* **LOGON**
2.   *Hit* **Space Bar**
3.   *Type your* **RACF ID**
4.   *Hit* **Control**
5.   *Type in your* **Password**
6.   *Hit* **Control**
7.   *Type in* **TSO**
8.   *Hit* **Space Bar**
9.   *Type* **ALU**
10.   *Hit* **Space Bar**
11.   *Type in* **Employee's RACF ID**
12.   *Hit* **Space Bar**
13.   *Type* **RESUME**
14.   *Hit* **Control**

If your screen looks like this **(see the example below)** before you hit your final **Control**, you are correct

- **Example:** TSO ALU J955555 RESUME

Exhibit 1.4.61-2   Internal Revenue Manual   Cat. No. 74335G (04-27-2023)

Exhibit 1.4.61-3   (12-16-2020)
Actions to Resume and Assign New Passwords

To Resume an employee on ACS that has been Revoked and issue a new password, take the following actions

From your IAP Screen

1. *Type* **Logon**
2. *Hit* **Space Bar**
3. *Type your* **RACF ID**
4. *Hit* **Control**
5. *When you see* *** *hit* **Control** *again*
6. *Type in* **TSO**
7. *Hit* **Space Bar**
8. *Type* **ALU**
9. *Type* **Space Bar**
10. *Type in* **Employees' RACF ID**
11. *Hit* **Space Bar**
12. *Type the word* **Password**
13. *Hit* **Space Bar**
14. *Type* **(**
15. *Type* **the temporary password you want to assign to the employee**
16. *Type* **)**
17. *Hit* **Control**

Note: **If your screen looks like this (see Example below) before you hit your final Control you are
correct.**

- **Example:** TSO ALU J955555 PASSWORD (NEW9$you)
Note: Passwords should be a combination of 8 letters/numbers including capital and small and also
special characters. This format works the best.

Exhibit 1.4.61-4   (12-16-2020)
Management Codes

Code	Description
ER, TFU, mm	T = Team, F = Function, U = Unit, m-m = an eight -digit employee number; designation. Used by a manager to call up all cases worked by this employee the current date while signed on in the particular function/unit designated. Employees's work will be sequenced and displayed on the terminal in the order it was processed. If m-m is not entered, the system will list all work performed by the designated function/unit in employee number order. ACS validates that requester is in unit.
EL, TFU, m-m	Same as ER except prints a hard copy listing at the call site overnight.
EMPL	Used to view alphabetical listing of employees with employee numbers entered on ACS.
MRXX	XX = team/function. Used to view the daily real time inventory report by team, function and unit.
MR00	Displays Daily Workload Report by team for this call site. ACS validates that requester is in the unit.
RP00	Used to access the Management Report Query Menu
SM00	Used to display the Security Maintenance screen and maintain security information on employees in their team within the same function.

Exhibit 1.4.61-4   Internal Revenue Manual   Cat. No. 74335G (04-27-2023)

Exhibit 1.4.61-5   (12-16-2020)
ACS Profiles: Roles and Permissions

RACF Profile	ACS User Type Profile	Description of Role	Access to ACS Screens
MGR	L-Levy Review Manager	Review inventory processed and levies suspended by Levy Review Operators	Access to Levy Review application and Manager screens
USER	E – Levy Review Operator	Manually reviews pending levies meeting certain conditions.	Access to Levy Review application screens.
MGR	Q – Quality Review	Completes quality review on actions taken by the Levy Review Operators	Access to Levy Review Menu Screen.
USER	A – NLS Coordinator	Update, add and/or delete levy sources information.	NLSD System
USER	N- National Office	Able to access and make changes on the following: • Security Maintenance File • Parameter Tables • Special Inventory Teams, • Batch Action, • Disaster Assignment Table • Restriction by Profile • Levy Review Menu.	Access to the following: • Security Maintenance File • Parameter Tables • Special Inventory Teams • Batch Action Screens • Disaster Assignment Table • Restriction by Profile • Levy Review Menu.
SRP (Privleged User)	N- National Office	In addition to the access of USER N Profile, the SRP profile also approves , resets passwords and adds HQ users to the to ACS application	Access to the following: • Security Maintenance File • Parameter Tables • Special Inventory Teams • Batch Action Screens • Disaster Assignment Table • Restriction by Profile • Levy Review Menu.

Exhibit 1.4.61-5 (Cont. 1) (12-16-2020)
ACS Profiles: Roles and Permissions

RACF Profile	ACS User Type Profile	Description of Role	Access to ACS Screens
SRP (Privleged User)	M – Master	• Review case actions and monitors telephone calls of CRs • Add and inacti-vate CRs to the ACS Data Base, • View the ACS Parameter Tables • Revoke and Unrevoked CR RACF User ID for any one in the call site including another M profile. • Unlock an employee or an account assigned to an employee. • QMF permis-sions allow creation and modification of queries and have ability to request table access. .	Access to the following: • Entity data • Summary information and account data provided on all account screens • Security Mainte-nance File • TSO (Time Sharing Option) System • QMF (Query Man-agement Facility) System

Exhibit 1.4.61-5   Internal Revenue Manual   Cat. No. 74335G (04-27-2023)

Exhibit 1.4.61-5 (Cont. 2) (12-16-2020)
ACS Profiles: Roles and Permissions

RACF Profile	ACS User Type Profile	Description of Role	Access to ACS Screens
MGR	S – Supervisor	• Reviews case actions taken to perform certain managerial approvals • Monitors telephone calls of CRs assigned to their team • Revoke and unrevoked CR RACF User ID for any operator or another supervisor in the call site but not a master profile • QMF permissions allow creation and modification of queries but no ability for table access	Access to the following: • Entity data • Summary information and account data provided on all account screens • TSO (Time Sharing Option) System • QMF (Query Management Facility) System.
USER	O-Operator	Review case information, work and update case actions on ACS inventory	Access to the following: • Entity Data • Summary information and account data provided on all account screens • Does not have access to any manager screens
USER	V-View Only	Employees needing access to ACS to view actions taken. No ability to take actions on ACS.	Access to the following: • Entity data • Summary information and account data provided on all account screens

Exhibit 1.4.61-5 (Cont. 3) (12-16-2020)
ACS Profiles: Roles and Permissions

RACF Profile	ACS User Type Profile	Description of Role	Access to ACS Screens
MGR	B-CDP Supervisor	Place cases into, access or remove cases in S8 inventory. Review case actions taken by the CDP Operators.	Access to the following: • Entity data • Summary information and account data provided on all account screens in the S8 Support Inventory • Has managerial access.
USER	C-CDP Operator	Place cases into, access/ remove or work cases in S8 inventory	Access to the following: • Entity data • Summary information • Account data provided on all account screens in the S8 Support Inventory
USER	D-View Only	HQ Analysts needing access to ACS HQ tables. They have no ability to take actions on ACS.	Access to the following: • Security Mainte-nance File • Parameter Tables • Special Inventory Teams • Batch Action Screens • Disaster Assignment Table • Restriction by Profile • Levy Review Menu

Exhibit 1.4.61-5   Internal Revenue Manual   Cat. No. 74335G (04-27-2023)

Exhibit 1.4.61-5 (Cont. 4) (12-16-2020)
ACS Profiles: Roles and Permissions

RACF Profile	ACS User Type Profile	Description of Role	Access to ACS Screens
MGR	P: Supervisor (SCP only)	• Review case actions taken to perform certain managerial approvals • Monitors telephone calls of CRs assigned to their team • Revoke and unrevoked CR RACF User ID for any operator or another supervisor in the call site but not a master profile • QMF permissions allow creation and modification of queries but no ability for table access	Access to the following: • Entity data • Summary Information and account data provided on all account screens, • TSO (Time Sharing Option) System • QMF (Query Management Facility) System.
USER	R-Operator (SCP only)	Review case information, work and update case actions on ACS inventory.	Access to the following: • Entity data • Summary information and account data provided on all account screens • Does not have access to any manager screens.

Exhibit 1.4.61-6   (12-16-2020)
ACS Applications

ACS applications were created for each call site and/or support sites with separate applications for each RACF profiles. In addition, applications were created for TAC offices based on region, Lions World Service clients and HQ applications for Analysts and Quality. The RACF profiles are as follows:

- USER applications for the Customer Service Representatives (CSRS) with the RACF "USR" profile
- MGR applications for Supervisors with the RACF "MGR" profile
- SA (SRP) applications for Systems Analysts with the RACF "SRP" profile

Note: The XXX in the chart below represents the" USER", "MGR "or "SA (SRP)" application

Application	Description
PROD XXX ASC ACS (ICS/ACS/PRINT - SC)	Andover ACS call site
PROD XXX ATLANTA ACS (ICS/ACS/PRINT - SC	Atlanta ACS call site
PROD XXX AUSTIN ACS (ICS/ACS/PRINT - SC)	Austin ACS call site
PROD XXX BSC ACS (ICS/ACS/PRINT - SC)	Brook haven ACS call site
PROD XXX BUFFALO ACS (ICS/ACS/PRINT - SC)	Buffalo ACS call site
PROD XXX CSC ACS (ICS/ACS/PRINT - SC)	Cincinnati ACS call site
PROD XXX DENVER ACS (ICS/ACS/PRINT - SC)	Denver ACS call site
PROD XXX DES MOINES ACS (ICS/ACS/PRINT - SC)	Des Moines ACS call site
PROD XXX Detroit / CSC ACS (ICS/ACS/PRINT - SC)	Detroit ACS call site/ Cincinnati Support
PROD XXX FRESNO ACS (ICS/ACS/PRINT - SC)	Fresno ACS call site and Fresno Support
PROD XXX JACKSONVILLE ACS (ICS/ACS/PRINT - SC)	Jacksonville ACS call site
PROD XXX KANSAS CITY ACS (ICS/ACS/PRINT - SC)	Kansas City ACS call site and Kansas City Support
PROD XXX MEMPHIS ACS (ICS/ACS/PRINT - SC)	Memphis ACS call site
PROD XXX NASHVILLE ACS (ICS/ACS/PRINT - SC)	Nashville ACS call site
PROD XXX OAKLAND ACS (ICS/ACS/PRINT - SC)	Oakland ACS call site
PROD XXX OSC ACS (ICS/ACS/PRINT - SC)	Ogden ACS call site
PROD XXX PSC ACS (ICS/ACS/PRINT - SC)	Philadelphia ACS call site and Philadelphia Support
PROD XXX PUERTO RICO ACS (ICS/ACS/PRINT - SC)	Puerto Rico ACS call site
PROD XXX SEATTLE ACS (ICS/ACS/PRINT - SC)	Seattle ACS call site
PROD XXX CENTRAL REGION TAC ACS (ICS/ACS/PRINT - SC)	Central Region TAC office maintained by Kansas City
PROD XXX EASTERN REGION TAC ACS (ICS/ACS/PRINT - SC)	Eastern Region TAC office maintained by Jacksonville

Exhibit 1.4.61-6   Internal Revenue Manual   Cat. No. 74335G (04-27-2023)

Exhibit 1.4.61-6 (Cont. 1) (12-16-2020)
ACS Applications

Application	Description
PROD XXX WESTERN REGION TAC ACS (ICS/ACS/PRINT - SC)	Western Region TAC office maintained by Seattle
PROD XXX SCP ACS (ICS/ACS/PRINT - SC)	ACS Special Compliance Personnel
PROD USER LIONS WORLD SERVICES ACS (ICS/ACS/ PRINT - SC)	Lions World Service Clients to request ACS training profile maintained by Austin
PROD XXX MCC IAP SYSM - APACSHQ (CT)(ICS/ACS/ PRINT-MCC) (ICS/ACS/PRINT-MCC)	ACS HQ Analysts
PROD USER MCC IAP SYSM QUALITY (CQ) (ICS/ACS/ PRINT-MCC)	HQ PAS Quality Analysts

Exhibit 1.4.61-7   (04-27-2023)
Predictive Dialer System Case Assignment Program Reference IRM 5.19.5.5

Note: When cases are sent to S2 or I2 due to a bad phone number, the bad phone number will be zeroed out on ACS and a Terup record sent to IDRS

Predictive Dialer Comment	Value	If Levy Source Available (TDA or Combo) Send to:	If No Levy Source Available (TDA or Combo) Send To:	If TDI MFT 01,10,11 with a 6020(b) indicator Open TDI last 3 calendar years, Send To:	If TDI Only Send To:
B, N, or Q	B>3 or N>3 or Q>3 or B+N+Q>3 Ignore any Values in T&M.	E3 if the primary final notice date (PRI FNL NOT) and the third party (3rd PRTY) date is on each module; otherwise send to E2.	I2 or I4 if I2 ,,LOCDONE is found in the History.	LPS Return amount between 0 and $1,500 for the delinquent module and/or credit balance is between 0 and $1,500 send TOI7, TFRO8600. No LPS or over $1,500 and/or no credit balance or over $1,500 send TOI7,,TFQU.	I5
T	T>0 and B, N, M, Q=0	E3 if the primary final notice date (PRI FNL NOT) and the third party (3rd PRTY) date is on each module; otherwise send to E2.	If home, work or cell phone send to I4. If or POA phone number send to I2 or I4 if I2,,LOCDONE is found in the History.	LPS Return amount between 0 and $1,500 for the delinquent module and/or credit balance is between 0 and $1,500 send TOI7,, TFRO8600. No LPS or over $1,500 and/or no credit balance or over $1,500 send TOI7,,TFQU.	If is home or cell phone sent to I5. If POA phone, send to I2 or I5 if I2,,LOCDONE is in the History.

Exhibit 1.4.61-7   Internal Revenue Manual   Cat. No. 74335G (04-27-2023)

Exhibit 1.4.61-7 (Cont. 1) (04-27-2023)
Predictive Dialer System Case Assignment Program Reference IRM 5.19.5.5

Predictive Dialer Comment	Value	If Levy Source Available (TDA or Combo) Send to:	If No Levy Source Available (TDA or Combo) Send To:	If TDI MFT 01,10,11 with a 6020(b) indicator Open TDI last 3 calendar years, Send To:	If TDI Only Send To:
M	M>0	E3 if the primary final notice date (PRI FNL NOT) and the third party (3rd PRTY) date is on each module; otherwise send to E2.	I2 or I4 if I2 ,,LOCDONE is found in the history. A four day follow up will automati-cally be placed on the account..	LPS Return amount between 0 and $1,500 for the delinquent module and/or credit balance is between 0 and $1,500 send TOI7,, TFRO8600. No LPS or over $1,500 and/or no credit balance or over $1,500 send TOI7,,TFQU.	I5

Predictive Dialer New Alerts	Description
PDAO,,BNQ	This is when a busy, no answer or taxpayer hung up in the queue. For systemic movement of cases after four attempts, refer to chart above for B, N or Q
PDAO,,TEL	This is when a telephone company intercept message is received. For systemic movement of cases after one message, refer to chart above to T
PDAO,,MSG	This is when an automated message is played. For systemic movement of cases refer to chart above for M

Predictive Dialer Codes	Description
Date	The date the dialer attempts were made
H/W	For the 10 digits home or work phone number that was dialed
B	Number of busy signals

Exhibit 1.4.61-7 (Cont. 2) (04-27-2023)
Predictive Dialer System Case Assignment Program Reference IRM 5.19.5.5

Predictive Dialer Codes	Description
N	Number of no answers
T	Number of bad telephone number/signals
M	Number of pre-recorded answering machine messages
Q	Number of times a taxpayer hung up while waiting for an assistor to become available

Exhibit 1.4.61-7   Internal Revenue Manual   Cat. No. 74335G (04-27-2023)

Exhibit 1.4.61-8   (04-27-2023)
ACS Support Site Addresses

Support Site	General/Business Reply Address	Remittance Address
Cincinnati	ACS Support-Stop 813G PO Box 145566 Cincinnati, OH 45250-5566	ACS Support Stop 6052 PO Box 3894 Ogden UT, 84409
Fresno	ACS Support PO Box 24017 Fresno, CA 93779-4017	Internal Revenue Service PO Box 219980 Kansas City MO, 64121-9980
Kansas City	ACS Support Stop 5050 PO Box 219236 Kansas City, MO 64121-9236	ACS Support Stop 5050 PO Box 219236 Kansas City, MO 64121-9236
Philadelphia	ACS Support PO Box 8208 Philadelphia, PA 19101-8208	Internal Revenue Service PO Box 219690 Kansas City, MO. 64121-9690