EFFECTIVE DATE

(12-02-2022)

PURPOSE

(1) This represents a complete revision to the text, exhibits and Table of Contents for **IRM 13.6.1, Taxpayer Advocate Service Communications.**

MATERIAL CHANGES

(1) This IRM 13.6.1, Taxpayer Advocate Services Communications has been completely revised and restructured to reflect the current policies/procedures.

(2) The following changes were made:

Prior IRM Reference	Current IRM Reference	New Title	Description of Change
13.6.1.1 Introduction to TAS Communications	13.6.1 13.6.1.1 13.6.1.2 13.6.1.3 13.6.1.4	Program Scope and Objectives Background Authority Roles and Responsibilities Acronyms	New content added for required Internal Controls.
13.6.1.1.4 13.6.1.2.1.3(2)			Replace AWSS with FMSS
13.6.1.2 Tas Websites Policy 13.6.1.2.1 13.6.1.2.2 13.6.1.2.3 13.6.1.2.4	13.6.2	TAS Websites: Use and Responsibilities	Revised and restructured to reflect current policies/ procedures.
13.6.1.3 TAS Messages		TAS Welcome Screen	Revised and restructured to reflect current policies/ procedures.
13.6.1.4 C&L Reviews of TAS Documents		CSO Document Review	Revised and restructured to reflect current policies/ procedures.
13.6.1.5 TAS Newsletters	N/A	N/A	Obsolete

Prior IRM Reference	Current IRM Reference	New Title	Description of Change
13.6.1.6 TAS NTA Questions		TAS NTA Questions	Revised and restructured to reflect current policies/ procedures.
13.6.1.7 TAS Communica-tions Liaison Group	N/A	N/A	Obsolete
13.6.1.8 Com-munications Resources 13.6.1.8.1 13.6.1.8.2 13.6.1.8.3 13.6.1.8.4 13.6.1.8.5 13.6.1.8.6			Revised and restructured to reflect current policies/ procedures.
13.6.1.9 Interim Guidance (IG) Memoranda 13.6.1.9.1	N/A	N/A	Obsolete
13.6.1.10 Media Contacts 13.6.1.10.1		Media Contacts	Revised and restructured to reflect current policies/ procedures.
13.6.1.11 Stakeholder Relationship Management	N/A	N/A	Obsolete

Prior IRM Reference	Current IRM Reference	New Title	Description of Change
13.6.1.12 TAS Outreach 13.6.1.12.1 13.6.1.12.2 13.6.1.12.3 Congressional Outreach 13.6.1.12.3.1 13.6.1.12.3.2 13.6.1.12.4 13.6.1.12.5 Outreach Reporting 13.6.1.12.5.1 13.6.1.12.5.2 13.6.1.12.5.3		TAS Outreach	Revised and restructured to reflect current policies/ procedures.
13.6.1.13 E-mail Priority 13.6.1.13.1 13.6.1.13.2 13.6.1.13.3 13.6.1.13.4 13.6.1.13.5 13.6.1.13.6	N/A	N/A	Deleted entire subsection as content is owned by PGLD and IT. The content is housed in IRM 10.5.1.6.8 and IRM 10.8.1.3.19.2.1.
13.6.1.14 Facsimile (Fax) Policy	N/A	N/A	Obsolete - Content moved into IRM 10.5.1.
13.6.1.15 Voice Messaging System (VMS) Policy	N/A	N/A	Obsolete - Content moved into IRM 10.5.1.
13.6.1.16 Telephone Policy 13.6.1.16.1	N/A	N/A	Obsolete - Content moved into IRM 10.5.1.
13.6.1.17 Tele-conferencing: Conference Calls and Video Teleconfer-ences 13.6.1.17.1	N/A	N/A	Obsolete - Content moved into IRM 10.5.1.

Prior IRM Reference	Current IRM Reference	New Title	Description of Change
13.6.1.18 U.S. Mail (Surface Mail) Policy 13.6.1.18.1 13.6.1.18.2 13.6.1.18.3	N/A	N/A	Obsolete - Content moved to IRM 10.5.1.
Exhibits	N/A	N/A	Obsolete - Content moved into IRM 13.6.1.

EFFECT ON OTHER DOCUMENTS

This IRM supersedes IRM 13.6.1, Taxpayer Advocate Service, Internal and External Communications dated February 28, 2012. IRM Procedural Update (IPU) 22U0234 issued February 7, 2022 is incorporated into this IRM.

AUDIENCE

Primarily Taxpayer Advocate Service and all Operating Divisions and Functions.

Erin M. Collins
National Taxpayer Advocate

13.6.1
Internal and External Communications

Table of Contents

13.6.1.1 Program Scope and Objectives
13.6.1.1.1 Background
13.6.1.1.2 Authority
13.6.1.1.3 Roles and Responsibilities
13.6.1.1.4 Acronyms
13.6.1.2 TAS Websites: Use and Responsibilities
13.6.1.2.1 Welcome Screen
13.6.1.2.1.1 TAS Messages
13.6.1.2.1.2 TAS Alerts
13.6.1.2.1.3 Weather Related Closures
13.6.1.2.1.4 Other Office Closures
13.6.1.2.1.5 System Related Outages
13.6.1.2.1.6 TAS Directory
13.6.1.2.2 External Website
13.6.1.3 IRS Website with TAS Content
13.6.1.3.1 IRS Source
13.6.1.3.2 IRS.gov
13.6.1.4 TAS Social Media
13.6.1.5 TAS Standard Language
13.6.1.6 CSO Document Reviews
13.6.1.7 TAS NTA Questions
13.6.1.8 TAS Audio and Video Products
13.6.1.9 Media Contacts
13.6.1.10 News Releases
13.6.1.11 TAS Outreach
13.6.1.11.1 Outreach Plans
13.6.1.11.2 Outreach Audiences
13.6.1.11.2.1 Internal Outreach
13.6.1.11.2.2 External Outreach
13.6.1.11.2.3 Congressional Outreach
13.6.1.11.2.3.1 Local Congressional Office Visit Requirements
13.6.1.11.2.3.2 Participating in Congressional Office Hosted Events
13.6.1.11.3 Outreach SETR Time Codes
13.6.1.11.4 Outreach Hub and Advocate Toolkit

13.6.1.1
(03-17-2009)
Program Scope and Objectives

(1) **Purpose**: This IRM section provides communication guidance and outlines communication processes for Taxpayer Advocate Service (TAS) employees.

(2) **Audience:** These procedures apply to all TAS employees.

(3) **Policy and Program Owner:** The Communications, Stakeholder Liaison and Online Services (CSO) Director, who reports to the Executive Director of Operations Support.

13.6.1.1.1
(12-02-2022)
Background

(1) The TAS CSO office is responsible for all internal and external communications and related policies that originate within the TAS organization.

(2) All TAS communication products, projects, and initiatives with impact beyond the local office level must be coordinated with, approved by, and delivered through CSO. This includes but is not limited to TAS Welcome Screen alerts and messages, TAS specific content on IRS Source, taxpayeradvocate.irs.gov, and irs.gov, videos, social media posts, and outreach materials. The CSO Director, or designee, will decide when and how to release products or messages and consult with the NTA, or designee, when appropriate.

13.6.1.1.2
(12-02-2022)
Authority

(1) Pursuant to IRC 7803(c), the Office of the Taxpayer Advocate (known as TAS) shall assist taxpayers to resolve problems with the IRS.

13.6.1.1.3
(12-02-2022)
Roles and Responsibilities

(1) The TAS CSO office is responsible for all internal and external communications and related policies that originate within the TAS organization.

(2) CSO programs and policies support TAS's strategic goals and foundations.

(3) CSO carries out these supporting tasks in a variety of ways, including:

- Coordinating and delivering internal messages to TAS employees through the TAS Welcome Screen;
- Overseeing external outreach and communications to taxpayers, tax professionals, and internal outreach to other IRS business units;
- Raising awareness of the National Taxpayer Advocate's (NTA) priorities in tax administration, with focus on the Taxpayer Bill of Rights (TBOR);
- Marketing and promoting the NTA's Reports to Congress, making them widely available, visually compelling, and easy for the public to read and understand; and
- Using brand management practices to shape and define TAS's image and messaging, including the use of taglines such as ″Your Voice at the IRS.″

(4) TAS employees are responsible for following the procedures outlined in this IRM section when initiating internal and external messages and performing outreach activities.

(5) TAS managers are responsible for ensuring employees within their purview are following TAS communication procedures.

13.6.1.1.4
(12-02-2022)
Acronyms

(1) The following is a list of acronyms and their definitions used throughout this IRM section.

Acronym	Definition
ATK	Advocate Toolkit
BSP	Business Systems Planning
BUN	Business Unit News
CAR	Communications Assistance Request
CSO	Communications, Stakeholder Liaison and Online Services
C&L	Communications and Liaison
EDCA	Executive Director Case Advocacy
EITC	Earned Income Tax Credit
FMSS	Facilities Management and Security Services
GLC	Geographic Leadership Committee
IGM	Interim Guidance Memorandum
IMD/SPOC	Internal Management Document and Single Point of Contact
IT	Information Technology
LITC	Low Income Taxpayer Clinic
LTA	Local Taxpayer Advocate
NTA	National Taxpayer Advocate
NTEU	National Treasury Employees Union
PSD	Problem Solving Day
SAMC	Situation Awareness Management Center
SAMS	Systemic Advocacy Management System
SVEB	Servicewide Video Editorial Board
TAMIS	Taxpayer Advocate Management Information System
TAP	Taxpayer Advocate Panel
TAS	Taxpayer Advocate Service

Acronym	Definition
TBOR	Taxpayer Bill of Rights

13.6.1.2
(12-02-2022)
TAS Websites: Use and Responsibilities

(1) CSO manages the content and structure of TAS internal and external websites.

(2) The CSO Director, or designee, is responsible for management oversight and website design changes of the TAS internal and external websites.

(3) Designated management officials and TAS web content managers are responsible for keeping content current and compliant with Section 508 of the Rehabilitation Act of 1973 as amended (29 U.S.C. § 794d), most commonly referred to as Section 508.

(4) TAS managers will encourage employees to use the internal website, the TAS Welcome Screen, as a daily research tool.

(5) TAS employees are responsible for accessing the TAS Welcome Screen daily to stay informed of TAS policies, procedures, messages, alerts, upcoming events, and more.

(6) TAS employees should also be familiar with the TAS external website to stay informed of information TAS makes available to taxpayers and tax professionals about common tax issues, tax tips, taxpayer rights, reports, and more.

(7) The **TAS internal website**, known as the TAS Welcome Screen, is at*https://organization.ds.irsnet.gov/sites/tas/Sitepages/WelcomeScreen.aspxhttps://organization.ds.irsnet.gov/sites/tas/Sitepages/WelcomeScreen.aspx*

(8) The **TAS external website,**,is at *https://taxpayeradvocate.irs.gov/*.

13.6.1.2.1
(12-02-2022)
Welcome Screen

(1) The TAS Welcome Screen is the entry point to the **TAS internal website,** which acts as a central communications portal for TAS employees.

(2) The TAS Welcome Screen delivers real-time organizational communications, such as TAS messages and alerts, which are searchable and sortable by topic, category and date.

(3) The TAS Welcome Screen provides quick access to frequently used tools needed to advocate for taxpayers. It contains links to the TAS directory, departments, programs, technical topics, case guidance tools, training events, leadership messages, and other information.

(4) The TAS Welcome Screen provides quick access to key systems such as the Taxpayer Advocate Management Information System (TAMIS), the Systemic Advocacy Management System (SAMS), TAS external websites, and other popular links.

(5) CSO is responsible for the overall structure, appearance, and maintenance of the TAS Welcome Screen, as well as, the daily publishing of messages to employees and managers.

(6) The CSO Director, or designee, will approve any changes to the TAS Welcome Screen.

(7) The **TAS Welcome Screen,** internal website is at *https://organization.ds.irsnet.gov/sites/tas/SitePages/WelcomeScreen.aspx* .

13.6.1.2.1.1
(12-02-2022)
TAS Messages

(1) CSO manages and posts all internal and external messages with national implications or significance (*i.e.*, any message that impacts TAS employees above the local office level). Employees must submit all such messages to CSO using the Communications Assistance Request (CAR) system for publication on the TAS Welcome Screen. Messages on the **internal** TAS Welcome Screen include, but are not limited to:

- Messages for all TAS employees;
- Messages for all TAS managers;
- Case guidance messaging for all Intake and Case Advocate's;
- Office Closure and system outage alerts.

Messages on the TAS **external** website include, but are not limited to:

- Messages for taxpayers and tax professionals; and
- The NTA Blog.

(2) Employees will use the CAR system to initiate and submit messages to CSO.

(3) All messages sent to CSO for publication must:

- Include sufficient time for processing through the CAR system - CSO must receive the CAR **two weeks prior to the requested publish date.**
- Follow the *TAS Welcome Screen Message Style Guide.*. This guide provides tips and guidelines for writing Welcome Screen messages.
- Be written in plain language. See *IRS Plain language* for more information.
- Include working hyperlinks (to documents, sites, etc.).
- Be proofread and spell checked for accuracy and clarity.
- Ensure any linked content is 508 compliant - meaning they are accessible to everyone - regardless of any handicap or physical disability. Section 508 of the Workforce Rehabilitation Act is a law that requires federal agencies to make their electronic documents accessible to those with disabilities. See the *IRS Alternative Media Center* for more information.
- Address National Treasury Employees Union (NTEU) meeting requirements when applicable.
- Be approved by the initiator's management chain, at the Director level, before submitting to CSO for publishing.

(4) Messages designated for managers will also be available to management officials and non-bargaining unit analysts with appropriate Director level approval. The CAR's initiator must inform CSO if any content is sensitive and must be restricted to managers only which will then be distributed via email.

(5) CSO is responsible for the creation, maintenance, and posting of the *TAS Communications Assistance Request (CAR) System User Guide for CAR Initiators and Reviewers.* This guide includes detailed guidance on how to submit a CAR and the various types of available message categories.

(6) The CAR system is available on the internal TAS SharePoint site at*https://organization.ds.irsnet.gov/sites/tas/SitePages/CARnew.aspx.*

13.6.1.2.1.2
(12-02-2022)
TAS Alerts

(1) CSO will manage and publish all alerts about office and system availability on the TAS Welcome Screen.

(2) All alert requests must be sent to CSO using the CAR system.

13.6.1.2.1.3
(12-02-2022)
Weather Related Closures

(1) CSO will coordinate with Operations Support to publish office closures as alerts on the TAS Welcome Screen.

(2) Operations Support will review office closure notices provided by Facilities Management and Security Services (FMSS), the Situation Awareness Management Center (SAMC) system, and TAS Area analysts, to create a consolidated list of closed offices, delayed office openings, and early office closures at the beginning of each work day.

(3) Operations Support will submit a CAR to CSO to publish the list of affected offices as an alert on the TAS Welcome Screen.

(4) TAS Welcome Screen alerts will not include delayed openings or early closures if the time the office is closed is less than four hours. Unless Operations Support and CSO are advised otherwise, office opening times will be 8:00 a.m. and closing times will be 4:00 p.m. local time.

13.6.1.2.1.4
(12-02-2022)
Other Office Closures

(1) If an office experiences an office closure not related to weather, such as a power outage, maintenance issues, emerging situation etc., the Area analyst will notify Operations Support.

(2) If the reason for closure is sensitive in nature, Operations Support and CSO will coordinate with the Executive Director Case Advocacy (EDCA), or designee, over the affected office to determine if a TAS-wide alert is appropriate.

(3) Operations Support will submit a CAR to CSO to publish the office closures as an alert on the Welcome Screen.

(4) TAS Welcome Screen alerts will not include delayed openings or early closures if the time the office is closed is less than four hours. Unless Operations Support and CSO are advised otherwise, office opening times will be 8:00 a.m. and closing times will be 4:00 p.m. local time.

13.6.1.2.1.5
(12-02-2022)
System Related Outages

(1) Business Systems Planning (BSP) will coordinate with CSO to publish technology related outages as an alert on the TAS Welcome Screen.

(2) Each Area will designate an analyst to coordinate technology related issues with CSO and BSP.

(3) If a user at a local office identifies a system outage affecting multiple personnel at their site, then they should report the issue to the IT Help Desk, request the shared group assignment on the ticket reflects BU-TAS-BSP, and inform their Area analyst of the IT ticket number.

(4) If the local office cannot call the IT Help Desk due to a phone outage, then they should send an email to the Area analyst and BSP to request they create the IT ticket.

(5) If IT confirms a system outage is impacting multiple TAS personnel, and it is expected to last one full working day, BSP will submit a CAR to CSO to publish the system outage as an alert on the TAS Welcome Screen.

13.6.1.2.1.6
(12-02-2022)
TAS Directory

(1) IRC § 7803(c)(2)(C)(iii) requires the local telephone number for each local office of the taxpayer advocate is published and available to taxpayers served by that office. CSO will maintain and update TAS addresses, including publications and online sources.

(2) CSO also maintains a TAS directory of all TAS offices and personnel, which is accessible on the TAS Welcome Screen.

(3) Each TAS office assigns a local coordinator who is responsible to timely notify CSO of additions, edits, and deletions to the directory.

(4) Send local coordinators changes to **TAS Directory*.

(5) CSO maintains a current list of local coordinators.

(6) The *TAS Directory Quick Reference Guide* is created and managed by CSO to assist users in searching and navigating the directory.

(7) The TAS directory is available on the Welcome Screen at *https://organization.ds.irsnet.gov/sites/tas/SiteAssets/TAS%20Directory.aspx.*

13.6.1.2.2
(12-02-2022)
External Website

(1) The TAS **external** website, provides taxpayers and tax professionals with clear and concise information about TAS, common tax issues, tax tips, taxpayer rights, reports and more.

(2) Its goal is to help the public find information quickly on many common tax issues, from locating a refund to navigating an audit. Each issue page provides general information, offers next steps, advises about possible consequences of action or inaction, reminds taxpayers of their rights, and suggests further resources to help them resolve issues themselves when possible.

(3) The website includes in-depth information on the Taxpayer Bill of Rights, information for tax professionals, recent news about tax issues, and other information about TAS. It serves as the primary vehicle for presenting, publicizing, and promoting the NTA's Reports to Congress, NTA Congressional testimony, NTA Blog, Low Income Taxpayer Clinics, and the Taxpayer Advocacy Panel.

(4) Parts of the site are available in Spanish.

(5) CSO creates and manages content for the external website which is approved by the CSO Director, or designee, and Chief Counsel if appropriate.

(6) The **TAS external website** is at *https://www.taxpayeradvocate.irs.gov/*

13.6.1.3
(12-02-2022)
IRS Website with TAS Content

(1) CSO manages and contributes TAS specific content for the IRS's internal and external websites.

(2) The CSO Director, or designee, is responsible for management oversight of the TAS content on the IRS internal and external websites.

(3) Designated management officials and TAS web content managers are responsible for keeping content current and compliant with Section 508 of the Rehabilitation Act of 1973 as amended (29 U.S.C. § 794d), most commonly referred to as Section 508.

(4) TAS managers will encourage employees to use the IRS internal and external websites.

(5) TAS employees should also be familiar with the IRS external website to stay informed on information IRS makes available to taxpayers and tax professionals.

(6) The **IRS internal website,** IRS Source, can be accessed at *https://irssource.web.irs.gov/Pages/Home.aspx*

(7) The **TAS external website** is at *https://www.taxpayeradvocate.irs.gov/*

13.6.1.3.1
(12-02-2022)
IRS Source

(1) The IRS Source is the **IRS's internal website.**

(2) The IRS Source is a comprehensive site all IRS employees are encouraged to use. It contains employee and job resources such as links to administrative sites, incident reporting information, news, events, forms, publications, technology assistance, and various technical tools.

(3) CSO collaborates with IRS Communications and Liaison (C&L) to post weekly Business Unit News (BUN) articles on the IRS Source homepage that serve as internal outreach to employees in other IRS business units. BUN articles can involve policy or major TAS initiatives and announcements including but not limited to the Annual Report to Congress, testimony by the NTA, outreach, and NTA blog.

(4) All IRS business units have pages specific for their organization that can be accessed from the IRS Source homepage. Each business unit is responsible for the content of their pages. CSO manages the TAS specific pages.

(5) The **IRS Source website** is at *https://irssource.web.irs.gov/Pages/Home.aspx.*

(6) **TAS specific pages accessed through IRS Source** are at*https://tas.web.irs.gov/.*

13.6.1.3.2
(12-02-2022)
IRS.gov

(1) IRS.gov is the **IRS's external website.**

(2) CSO manages TAS specific content pages on IRS.gov.

(3) The content provides taxpayers and tax professionals with clear and concise information about TAS, common tax issues, taxpayer rights, reports, Low Income Taxpayer Clinics, the Taxpayer Advocacy Panel, the Systemic Advocacy Management System (SAMS), and more.

(4) Parts of the site are available in Spanish and several other languages.

(5) The **IRS external website** is at *https://www.irs.gov/.*

13.6.1.4
(12-02-2022)
TAS Social Media

(1) CSO manages official social media sites and accounts to help deliver TAS messages to the widest possible audiences. These include:

a. Facebook*http://www.facebook.com/YourVoiceatIRS;*
b. Twitter*http://Twitter.com/YourVoiceatIRS;*
c. LinkedIn*https://www.linkedin.com/company/taxpayer-advocate-service;*
d. YouTube*http://www.youtube.com/TASNTA; and*
e. Medium*https://medium.com/@YourVoiceAtIRS.*

(2) CSO is responsible for creating and posting TAS social media content, graphics and videos on all official platforms. Only CSO can post social media on behalf of TAS.

(3) The CSO Director, or designee, is responsible for the review and approval of all social media posts.

13.6.1.5
(12-02-2022)
TAS Standard Language

(1) CSO develops and maintains standard language about TAS for use in IRS and TAS publications, brochures, notices, and other internal and external documents and websites to provide taxpayers with correct and consistent information about the TAS organization and how to seek TAS assistance.

(2) CSO works with the TAS Internal Management Document and Single Point of Contact (IMD/SPOC) staff and IRS business units to ensure TAS standard language is consistent in all IRS IRMs and materials that mention TAS.

(3) CSO works with IRS business units to ensure only approved TAS standard language is published internally and externally.

(4) CSO collaborates with Local Taxpayer Advocates (LTAs) to ensure they use this language when speaking about the organization. All LTAs should incorporate TAS standard language in outreach communications to external audiences.

(5) CSO is the point of contact for changes to TAS standard language. CSO will work with EDCA-ITS for the placement of standard language on technical products. The CSO Director, or designee, must approve all changes to TAS standard language and requests to place TAS language in publications, brochures, notices, documents, or on websites outside the TAS organization.

(6) TAS standard language document is at *http://tas.web.irs.gov/Comm/default.aspx.*

13.6.1.6
(03-17-2009)
CSO Document Reviews

(1) CSO must review all external public facing information material going to other IRS business units, external stakeholders, and taxpayers (*e.g.* not case-related information, team or taskforce data). This material includes but is not limited to:

- IRS forms, publications, notices, letters, or other documents;
- Articles for IRS or external media and websites;
- NTA reports (including each year's Annual Report and Objectives Report); and;
- All TAS IRMs and IRS communications-related IRMs.

(2) All document reviews sent to CSO must:;

- Follow the appropriate and applicable writing guide.

- TAS Writing and Style Guide – NTA Products and Reports to Congress-*TAS Writing and Style Guide – NTA Products and Reports to Congress*
- IRS Style Guide*IRS Style Guide*
- IRM Style Guide*IRM Style Guide*

- Be written in plain language. See *IRS Plain language* for more information.
- Include working hyperlinks (to documents, sites, etc.).
- Be proofread and spell checked for accuracy and clarity
- Be 508 compliant – meaning they are accessible to everyone - regardless of any handicap or physical disability. Section 508 of the Workforce Rehabilitation Act is a law that requires federal agencies to make their electronic documents accessible to those with disabilities. See the *http://amc.enterprise.irs.gov/index.html* for more information.

(3) TAS offices should send document reviews to their designated CSO contacts with a carbon copy to the CSO Director or designee.

13.6.1.7
(12-02-2022)
TAS NTA Questions

(1) The **TAS NTA Questions* mailbox is available to all TAS employees to submit questions, comments, or suggestions to TAS leadership. CSO also uses the box to manage questions about special projects, programs, and TAS live webcasts (Town Halls, Symposium, and NTA videos) or as requested by the NTA or DNTA for special initiatives..

(2) CSO will manage all messages received in the *TAS NTA Questions mailbox. CSO responsibilities include:

a. Acknowledging receipt of message;
b. Identifying the appropriate area or individual responsible for preparing a response based on the subject;
c. Forwarding message to the appropriate office for timely action or response;
d. Reviewing and editing responses; and
e. Determining the appropriate way to deliver the response – directly to the originator or sharing on the TAS Welcome Screen.

(3) All correspondence to the **TAS NTA Questions* mailbox is anonymous. CSO removes all identifying information (names, offices, etc.) before forwarding the question, comment, or suggestion.

(4) The appropriate office designated for the response has the responsibility to be timely in their response to CSO.

13.6.1.8
(12-02-2022)
TAS Audio and Video Products

(1) Audio and video are creative ways to communicate and can have a greater impact than the written word. TAS uses these options to communicate with both internal and external audiences.

(2) TAS audio and video products fall under these categories:

a. **Live video -** Feature at least one presenter and may be recorded or streamed live by the IRS TV Studio or a vendor secured through IRS Information Technology (IT).
b. **Motion graphics -** Digitally created videos featuring a narrator and moving or animated graphics.
c. **Screen capture -** Narrated video with recorded screen activity, especially good when educating viewers on the use of a system or software.

d. **Audio -** Messages delivered via audio only with no graphics or live video.

(3) Any TAS office interested in developing an audio or video product must submit a request using the CAR system allotting the following timeframes:

a. Video requests must be submitted at least 10 weeks prior.
b. Audio requests must be submitted at least 30 days prior.

Note: When considering a delivery date, remember that it can take several weeks for post-production (depending on the type and complexity of the video). You will get an estimated time frame once CSO has all the details of the request.

(4) CSO staff coordinates the approval, creation, development and production process of both the audio and video.

(5) CSO will work together with the CAR initiator to submit any required documents to secure Servicewide Video Editorial Board (SVEB) approval. The SVEB was established to support the IRS Mission and oversee development and standards for video across the IRS. They determine in advance if making the video is appropriate, taking into account the cost, topic, tone and purpose of the video. See the SVEB webpage at *https://irssource.web.irs.gov/CL/SitePages/SVEB.aspx* for more information about SVEB.

(6) After approval of the SVEB request, CSO will complete any other forms the SVEB or IRS IT requires.

(7) CSO will coordinate pre-and post-production meetings and offer some creative input to help develop the concept and ensure the product meets your needs. It is important for TAS videos to be creative, but they must also follow an approved format for branding, layout, music, and length, and must deliver a consistent, substantive TAS message.

(8) The CSO Director, or designee, must approve all scripts before audio/video production begins.

(9) To meet Section 508 of the Rehabilitation Act of 1973, all audio and video products must include closed captions. TAS creates its own captioning for all motion graphic videos, and most in-house produced videos.

(10) The CSO Director, or designee, must approve the final audio/video product before distribution. This approval is required to present consistent messages and ensure they do not depart from TAS or IRS policy.

13.6.1.9
(12-02-2022)
Media Contacts

(1) TAS generally follows the guidance provided for all IRS employees in *11.1.3 Contact with the Public and the Media*; however, TAS does provide additional guidance on national and local media contacts as follows:

(2) If you are contacted by **local** or **national** media representatives, including television, newspaper, and social media personnel and reporters, follow these steps:

a. Determine if the inquiry is about IRS or TAS.
b. If it relates to IRS information:

Refer them to the IRS Media Relations Office at 202-317-4000.

c. If it relates to TAS information:

Notify the CSO Director, or designee, by email. Include details including the media outlet name, reporter, phone, topic, deadline, how quotes/comments will be used by the reporter, etc.

(3) Whether the media request involves an interview or written product, TAS employees should work with CSO to ensure all responses are handled through the CSO

13.6.1.10
(12-02-2022)
News Releases

(1) All news releases must go to the Director CSO, or designee, for clearance before submission to Media Relations.

13.6.1.11
(12-02-2022)
TAS Outreach

(1) TAS will conduct outreach activities to expand awareness of TAS services with special emphasis on emerging issues and TAS's underserved populations.

(2) TAS will establish and maintain partner relationships internally with all IRS business units and externally with Congress, tax practitioners, and taxpayers.

(3) LTAs serve as the NTA's "boots on the ground" in his or her community. They have the primary responsibility for their area's outreach programs, including all personal interactions such as presentations, roundtable discussions, and personal visits.

(4) LTAs are expected to deliver the NTA's messages consistently during each outreach in addition to identifying emerging issues that need to be addressed or elevated to the NTA.

(5) Based on annual outreach guidelines, additional TAS functions and employees may be involved with outreach activities.

(6) CSO coordinates the outreach program by managing outreach materials and communications with local and headquarter offices. CSO serves as the point of contact for TAS leadership, local offices, and IRS business units.

13.6.1.11.1
(12-02-2022)
Outreach Plans

(1) Each LTA office will develop and deliver annual outreach plans and will download them to the Outreach Hub.

(2) LTAs will create their plans by following the annual outreach guidelines in tandem with the annual Focus Guide.

(3) The following should also be considered when developing plans:

a. TAS strategic goals and operational priorities;
b. NTA Fiscal Objectives Report to Congress;
c. NTA Annual Report to Congress;
d. TAMIS data - case receipt trends, etc;
e. SAMS data - systemic issue submission trends, etc.;
f. Recurring issues that generate TAS cases;
g. New tax law issues; and
h. Demographic or other research data.

(4) Costs, available resources, and other program priorities should always be considered. Plans should strongly emphasize creating lasting professional

relationships with new and existing organizations that reach numerous underserved taxpayers. The goal is for LTAs to be known resources on tax issues within their communities.

(5) LTAs in states with multiple offices should coordinate their planned events so they do not duplicate efforts and contacts.

(6) Annually, each LTA office and other TAS functions will download their outreach plan to the Outreach Hub (see section 13.6.1.5.2) and then submit it to the Director (DEDCA or HQ Director, as appropriate) for review. Once plans are reviewed, the Director's office will use the approval process embedded in the outreach plan which sends notification to CSO to begin review and final approval.

(7) Each DEDCA (or Director) office is responsible for making sure each office timely executes its plan throughout the fiscal year.

13.6.1.11.2
(03-17-2009)
Outreach Audiences

(1) All outreach plans should include activities that reach the following audiences, as appropriate:

a. Internal;
b. External;
c. Congressional;
d. Media;
e. Low Income Taxpayer Clinics (LITC); and
f. Taxpayer Advocacy Panel (TAP).

13.6.1.11.2.1
(12-02-2022)
Internal Outreach

(1) Internal outreach is educating IRS employees about TAS, it's mission, and services. It is critical that IRS employees understand TAS's mission and the role it plays in advocating for taxpayer rights, along with understanding when cases should be referred to IRS for TAS assistance.

(2) LTAs are expected to build professional relationships with local IRS leaders and seek opportunities to make presentations at local group meetings, briefings, and employee training events including annual Continuing Professional Education (CPE) classes.

(3) Local offices are expected to create and maintain professional relationships with their local IRS counterparts to identify and discuss current and emerging tax issues.

(4) LTAs should consider participating in Geographic Leadership Communities (GLC) or similar cross-functional groups to build and improve professional relationships with IRS leaders.

(5) Internal outreach includes:

a. Information about the Taxpayer Bill of Rights (TBOR)*https://www.taxpayeradvocate.irs.gov/get-help/taxpayer-rights/.*
b. Information about TAS case criteria as defined by *IRM 13.1.7.3, Introduction to Taxpayer Advocate Service Case Criteria.*
c. Discussion of current issues leading to case referrals to TAS.
d. Awareness of SAMS and how raising a systemic problem this way may help correct a flawed process or procedure.
e. Information about TAS's external website*https://www.taxpayeradvocate.irs.gov/*

f. Information about the Taxpayer Roadmap*https://www.taxpayeradvocate.irs.gov/roadmap.*

13.6.1.11.2.2
(12-02-2022)
External Outreach

(1) External outreach is educating the public about TAS, it's mission, and services. It is critical that taxpayers and tax professionals understand TAS's mission and the role it plays in advocating for taxpayer rights.

(2) LTAs are expected to gain knowledge about the local taxpayers, companies, and organizations in the communities they serve.

(3) LTA outreach plans should include a strong focus on events and opportunities to reach the underserved residents of their states including unique populations or demographic state-specific audiences. The outreach plan should blend the individual needs of each state along with the more global needs of all taxpayers with attention to advocating for taxpayer rights.

(4) External outreach can be done in a variety of ways, including in-person or electronically shared presentations.

(5) External outreach includes:

a. Problem Solving Day (PSD) events where LTAs, Taxpayer Advocate Group Managers, Lead Case Advocates, Case Advocates, and co-located Technical Advisors, meet in-person with taxpayers and representatives to address unresolved IRS tax issues. Case Advocates will be prepared to advocate and resolve taxpayer issues on the spot, if possible. LTAs will submit to CSO a marketing flyer at least two weeks prior to their scheduled event. CSO will review and approve the flyers and post them to the external TAS website and various TAS social media accounts.
b. Local Outreach Initiatives include issues that are either unique or of significant importance to the LTA's communities. In determining unique and significant issues, LTAs will give attention to congressional cases received locally, interactions with congressional office personnel, local disasters, and issues raised at PSD events, or by a GLC.
c. Partnering with Tax Professionals. Local offices are valuable resources for tax professionals and can help them navigate the complex tax system and resolve their clients new or lingering tax issues. A significant number of TAS cases start with tax professional referrals so it is imperative that we maintain and foster a professional relationship with this group.
d. Earned Income Tax Credit (EITC) Awareness Day which is where IRS annually selects a day – usually during or around the last week in January - to raise awareness among low-income taxpayers and others who qualify for the EITC. This is a great opportunity for TAS to partner with the IRS, LITCs, and TAP. LTAs should consider adding this event to their annual outreach plans.

13.6.1.11.2.3
(12-02-2022)
Congressional Outreach

(1) Congressional outreach is educating Congress about TAS, it's mission, services, and current tax issues that impact constituents in their states. It is critical that Congress understands TAS's mission and the role it plays in advocating for taxpayer rights, along with understanding when cases should be referred to TAS for assistance.

(2) LTAs must create and maintain relationships to keep Senators, Representatives, and their staff informed and engaged.

(3) LTAs are primarily responsible for conducting outreach to members of Congress. In addition to day-to-day interaction with congressional staff on constituent inquiries as described in IRM 13.1.8*Taxpayer Advocate Case Procedures, Congressional Affairs Program,* LTAs will maintain regular personal communication and provide excellent customer service on those congressional inquiries.

13.6.1.11.2.3.1
(12-02-2022)
Local Congressional Office Visit Requirements

(1) LTAs are expected to meet at least quarterly with local congressional offices, with at least one annual in-person visit on Capitol Hill. The purpose of meeting regularly is to develop and maintain excellent relationships and reinforce established communication channels

(2) LTAs should reach out to their congressional delegates quarterly during the fiscal year to address any questions prior to the filing season and to provide updates on their TAS congressional case statistics

(3) The annual in-person visit should be coordinated with the IRS Congressional District Liaisons (DL) whenever possible. See IRM 11.5.2, *Legislative Affairs, Congressional Affairs Program,* for more information on DL responsibilities, specifically IRM 11.5.2.3, *Coordination with Taxpayer Advocate Service.*

(4) Since the purpose of the annual in-person visit is to personally deliver and highlight the NTA's most recent ARC, it should be scheduled as soon after the Congressional Affairs Program (CAP) conference as possible. The CAP conference is a standing event that takes place each year in conjunction with the release of the NTA's ARC. These visits will count as a quarterly congressional contact for the outreach requirement.

13.6.1.11.2.3.2
(12-02-2022)
Participating in Congressional Office Hosted Events

(1) Congressional offices may occasionally host events that benefit their constituents such as financial literacy workshops, problem solving days, or community resource fairs. These events are a coordinated effort by local community-based organizations, local governmental entities, and congressional offices. Participating in these events is an excellent way to build congressional relationships while promoting TAS's mission within local communities.

(2) To make sure that TAS is being represented to the public in an appropriate and consistent manner, refer to the *Advocate Toolkit Congressional Office Hosted Events page* and IRM 13.6.1.9 *Media Contacts.*

(3) If the event involves media, refer to the *Advocate Toolkit Media Outreach page.*

13.6.1.11.3
(12-02-2022)
Outreach SETR Time Codes

(1) Time spent on outreach activities must be charged to the appropriate SETR outreach codes. Each office should make every effort to track outreach hours accurately in SETR and their outreach plans by updating the system timely. The SETR system has several Organization Function Program (OFP) codes for TAS employees to use when reporting time spent on outreach:

a. **36750**: Internal -- records preparatory time, travel time, and presentation time for outreach activities involving other IRS employees.
b. **36751**: Congressional -- records preparatory time, travel time, and presentation time for outreach activities involving congressional members or their staff members. It also includes time spent at the CAP conference.

c. **36752**: Tax Professionals -- records preparatory time, travel time, and presentation time for outreach activities involving tax practitioners/ practitioner groups attorneys, certified public accountants, public accountants, enrolled agents, electronic return originators, Tax Executive Institute, etc...
d. **36753**: External Meetings/Speeches/Events -- records preparatory time, travel time, and presentation time for outreach activities involving external groups when the audience cannot be defined more specifically. This category covers efforts related to conferences, fairs, education groups/ institutions, etc.
e. **36754**: Media -- records preparatory time, travel time, and presentation time involving outreach activities and interviews with media, including print, radio, and television and digital media.
f. **36755**: ID Theft Outreach -- records any time expended on outreach activities primarily related to ID theft.
g. **36775**: EITC Outreach-- records any time expended on outreach activities primarily related to EITC.
h. **84371**: HIRE Act-- records any time expended on outreach activities primarily related to the HIRE Act.
i. **84385**: Health Care Reform-- records any time expended on outreach activities primarily related to the ACA.
j. **85320**: Tax Reform-- records any time expended on outreach activities primarily related to Tax Reform.

(2) In addition to the actual time spent on the outreach activity, report all time spent on preparing for, traveling to, and performing follow-up activities related to the outreach activity under the same outreach code.

(3) Do not report time spent on preparing an outreach plan, reviewing its effectiveness, revising the plan, or reporting on progress under these codes. Report these activities under the “Management and Support” OFP code.

13.6.1.11.4
(12-02-2022)
Outreach Hub and Advocate Toolkit

(1) The TAS Outreach Hub is a comprehensive online site that provides LTAs and other TAS employees with everything they need regarding outreach.

(2) Outreach components found on the hub:

a. Program announcements;
b. Program information;
c. Plans;
d. Internal and external contacts;
e. User guides; and
f. The Advocate Toolkit (ATK): All outreach materials, products and background information used for conducting outreach.

(3) The ATK is the primary source of outreach information, guidance, and tools LTAs and other TAS functions need to meet their outreach responsibilities. It covers ever facet of the outreach program.

(4) Outreach components included on the ATK:

a. Program announcements;
b. Hot topics;
c. Calendar of upcoming events;
d. Annual Report to Congress;
e. Identity theft tools and resources;

f. Internal, external, and congressional outreach overview and tools;
g. Low Income Taxpayer Clinics (LITC);
h. LTA office directory;
i. Media outreach;
j. Military outreach;
k. Miscellaneous outreach tools and resources;
l. Taxpayer Bill of Rights (TBOR) information;
m. Taxpayer roadmap information;
n. The Taxpayer Advocate Panel (TAP);
o. Various tax topics;

a. Affordable Care Act (individual and business) provisions;
b. EITC tools and resources;
c. Filing season and tax law updates;
d. Fixing America's Surface Transportation (FAST) Act;
e. Private Debt Collection (PDC); and
f. Return preparer issues

(5) CSO manages all content on the TAS Outreach Hub.

(6) The TAS Outreach hub is at *https://organization.ds.irsnet.gov/sites/tas/CL/OR/SitePages/Home.aspx.*

(7) The ATK is at *https://organization.ds.irsnet.gov/sites/tas/CL/OR/SitePages/advocateToolkit.aspx.*