

TAS Technology

OVERVIEW

Technology helps support and drive our mission of advocating for taxpayers. Having the right information provided by software tools and the necessary hardware supporting these tools ensures our ability to provide excellent taxpayer support and customer experience to foster tax compliance. Without the necessary technology at our disposal, our abilities to nimbly advocate for taxpayers are severely limited.

The National Taxpayer Advocate learned in 2017 that the IRS does not plan to complete the Taxpayer Advocate Service Integrated System (TASIS) which had its funding paused in March 2014 after \$20 million was spent on the system.¹ Despite this setback, we continue to advocate to ensure the foundational elements of TASIS are included as key parts of the IRS Enterprise Case Management (ECM) project currently underway. As mentioned earlier in this report, ECM has adopted a taxpayer-centric stance, and the IRS is continuing work to make ECM a reality.

While the IRS has abandoned completing TASIS, and ECM continues in development, TAS proactively sought out funding to improve its legacy case management application, Taxpayer Advocate Management Information System (TAMIS). Upgrading TAMIS will deliver some of the capabilities and features already found in other IRS case management applications. The upgrades to TAMIS are slated for delivery by September 30, 2018, and will increase our ability to serve taxpayers seeking assistance.² At the same time, TAS will continue to participate in the ECM development process ensuring that the TASIS foundations are part of the overall ECM discussion.

TAS Advocates Improved Legacy Case Management

In the 2016 Annual Report to Congress, the National Taxpayer Advocate continued to bring attention to the risks surrounding not completing TASIS. Specifically, the report highlighted that if the IRS did not complete TASIS, the current TAS case management application, TAMIS, would need to be upgraded. The IRS would “be forced to invest time and funds in upgrading TAMIS, an obsolete legacy system” to support current TAS casework.³

Through the National Taxpayer Advocate’s persistent pursuit of funding, which originally began in 2014, TAS secured IRS Information Technology funding for critical updates to TAMIS in 2017. Although TAS’s antiquated system cannot be converted into a modern-day case management system, the IRS is making key fundamental changes to TAMIS while it continues its work on a broader ECM solution. These critical updates include the ability to attach documents to cases — a common capability on most systems today — and improvements to capturing taxpayer interactions. These changes bring TAS closer to virtual case files and improved efficiencies to support the TAS intake strategy.

1 Internal Revenue Service Fiscal Year (FY) 2017 Budget Request: Hearing Before the S. Subcomm. on Financial Services and S. General Government Comm. on Appropriations, 114th Cong. 27 (2016) (statement of Nina E. Olson, National Taxpayer Advocate).

2 IRS Applications Development - Purisolve, *IRS TAMIS Integrated Master Schedule (IMS)*, (April 27, 2018).

3 National Taxpayer Advocate 2016 Annual Report to Congress 109-120 (Most Serious Problem: *Enterprise Case Management (ECM): The IRS’s ECM Project Lacks Strategic Planning and Has Overlooked the Largely Completed Taxpayer Advocate Service Integrated System (TASIS) As a Quick Deliverable and Building Block for the Larger ECM Project*).

Document Attachments

The critical capability of attaching electronic documents to cases in TAMIS has a direct benefit not only to taxpayer service but also to employee engagement. By attaching documents, TAS can build cases more efficiently during the intake process, and Case Advocates will be able to ensure that vital information related to a taxpayer's case is secure and quickly accessible. Employees can move toward eliminating paper case files and benefit from having all the relevant case data available any time they need it.

Improving Initial Contact With Taxpayers

Each year, changes in IRS business processes, along with changes in tax law, require TAS to adapt to serve our taxpayers. As a part of our initial contact with taxpayers, the National Taxpayer Advocate established a case intake strategy that expands on the current local office case intake function. This expansion led to the Centralized Case Intake (CCI) organization and created a need for additional technology to support initial taxpayer contact. Unfortunately, delays in acquiring a modern-day case management system present a gap in TAS's ability to effectively collect data from the initial taxpayer contact.

As a part of CCI, TAS implemented a process for direct call transfers from IRS to TAS for taxpayers who meet TAS criteria for assistance. The TAS intake strategy focuses on taxpayer service and contact to increase the ability of taxpayers to speak to TAS as early as possible so TAS can better understand their issues and build more complete cases. Using our intake strategy with the CCI process, we can interview taxpayers and determine the best course of action, including routing work faster and serving taxpayers more effectively.

TAMIS was not designed to differentiate between less complex cases needing less information that could be closed quickly and those with more complexity. This forces advocates to spend time documenting various data fields in TAMIS that are not applicable to some cases. To eliminate this time-consuming, wasteful feature, development of the "quick case closure screen" is underway and is scheduled to be completed by September 30, 2018. Once these changes to TAMIS are available, advocates will be able to capture the minimum information required quickly and efficiently, creating more time to focus on serving taxpayers. In addition, TAMIS will be able to provide additional critical information gathered on the taxpayer's first contact and assist in identifying systemic and emerging issues that require additional analysis and attention.

Although these changes will improve technology for advocates and allow for more time focused on the taxpayer issues and actions, they still fall short when measured against a modern-day case management system. TAS is appreciative of the IRS's efforts to move in the right direction under ECM and its incorporation of TASIS principles toward that initiative and looks forward to seeing tenets of TASIS delivered as a part of ECM.