



TAS CASE ADVOCACY AND OTHER BUSINESS OBJECTIVES

A fundamental component of TAS's mission is to protect taxpayer rights and help taxpayers (*e.g.*, individuals, business owners, and exempt organizations) resolve tax-related issues they could not resolve on their own through normal IRS channels. Our Case Advocates work directly with taxpayers or their representatives by identifying issues, researching solutions, and advocating within the IRS on behalf of taxpayers to resolve the issues. TAS also identifies potential challenges and larger systemic problems that may affect a specific group of taxpayers or taxpayers at large and works proactively with the IRS to alleviate unnecessary burden for taxpayers. Our goal is to continuously improve our internal processes and advocacy efforts to work more efficiently and effectively for taxpayers.

1. BROADEN RELATIONSHIPS WITH TAXPAYERS THROUGH PROACTIVE OUTREACH

Many taxpayers may face financial hardships, experience economic burdens due to IRS action or inaction, or have difficulty resolving their issues directly with the IRS and need a helping hand. TAS is their safety net to resolve these issues. TAS assists taxpayers in resolving problems with the IRS through our casework and outreach. Our casework not only resolves issues for individuals and businesses but also provides TAS the opportunity to keep a pulse on current tax issues facing taxpayers and the IRS's response to these issues, and affords us the ability to continuously make recommendations to resolve or prevent issues. In addition to our casework, TAS uses data analytics to identify trends and develop outreach products and events that raise awareness about common tax issues.

TAS's relationships with internal and external stakeholders are critical to the success of our outreach. Between October 1, 2022, and March 31, 2023, TAS leveraged our relationships with stakeholders to complete 1,083 community events and 250 Problem Solving Days.¹ Our Local Taxpayer Advocates (LTAs) partnered with IRS Customer Assistance, Relationships, and Education; professional organizations; Low Income Taxpayer Clinics; Taxpayer Advocacy Panel volunteers; local congressional offices; radio stations; homeless shelters; local housing authorities; domestic violence shelters; the Salvation Army; libraries; high schools; colleges; universities; legal aid providers; and veterans-service organizations to inform taxpayers and practitioners about TAS services, eligibility for valuable tax credits, taxpayer rights, available tax resources, and how to address

¹ Data obtained from TAS Outreach Database (Mar. 31, 2023). Problem Solving Days provide TAS the opportunity to meet with taxpayers and their representatives to discuss unresolved IRS tax issues and provide education on the Taxpayer Bill of Rights, tax benefits and credits, and emerging issues.

unresolved tax issues. In addition, our LTAs participated in community resource fairs to raise awareness about TAS and assisted taxpayers in resolving problems with the IRS. Through our casework, TAS observed that taxpayers continue to suffer the residual effects of service interruptions and processing delays brought on by COVID-19 and continuously worked with our IRS counterparts to make recommendations throughout the year that mitigated the effects.

In fiscal year (FY) 2024, we aspire to broaden our relationships with underserved communities who face significant barriers when engaging with the IRS and who are suffering from financial hardships or systemic issues. Our focus on underserved populations will primarily include Native American communities, members of the military, taxpayers with disabilities, taxpayers with limited English proficiency, low-income taxpayers, taxpayers living in rural communities, taxpayers living abroad, and the elderly. Every LTA and their local office will examine their community's unique needs to develop an initiative that will focus their outreach efforts on a specific underserved population within their community. We will utilize real-time products to ensure equity by informing taxpayers about TAS services, tax law, and procedural changes. In FY 2024, TAS will help taxpayers resolve IRS issues through our partnerships with the IRS, including events such as the Saturday Taxpayer Experience Days. During these Taxpayer Experience Days, taxpayers can discuss their tax issues with an IRS or TAS employee who will help taxpayers resolve issues, understand their rights, and understand their eligibility for refundable credits.

In support of expanding TAS outreach endeavors, TAS commissioned an in-depth study of current outreach plans and activities to identify new and innovative ways to partner with internal and external stakeholders to better serve taxpayers and their representatives. The results will inform and direct our future outreach strategies and activities to educate and support underserved communities and emerging issues.

Objective 1 for FY 2024 – TAS will continue using proactive outreach to broaden relationships with taxpayers.

- Activity 1: Develop and communicate simple, customer-centric information to taxpayers about emerging tax issues, trends, and benefits.
- Activity 2: Partner with the IRS during Saturday Taxpayer Experience Days to assist taxpayers facing financial hardships or adverse impacts resulting from IRS action or inaction.
- Activity 3: Collaborate with internal and external stakeholders to expand our local offices' presence within underserved communities.
- Activity 4: Increase awareness of the TAS website and self-help resources through outreach and social media.

2. OPTIMIZE THE EXPERIENCE OF TAS CUSTOMERS

Assisting taxpayers is the core of everything we do in TAS and is the heart and soul of our employees. Throughout the year, we adjust the way we do business depending on the needs of taxpayers. Although some taxpayers prefer traditional methods of communication (*e.g.*, phone and mail), many want TAS to provide digital services like those provided by the private sector. In response to customer feedback, in FY 2023, TAS adopted digital service options and expanded taxpayers' ability to determine their eligibility for TAS services electronically via their mobile device or computer and completed testing of a functionality known as the Documentation Upload Tool (DUT). DUT is a digital solution that allows taxpayers and/or their representatives to submit case-related documents to TAS using a mobile device or computer through a secure portal. Due to the success of this DUT pilot, we are optimizing our customers' experience by expanding this tool to all congressional offices and tax professionals so they may submit case-related documents to their assigned TAS office digitally.