

In FY 2024, TAS will continue to protect taxpayers' *right to quality service* by redefining how TAS and the IRS will resolve disagreements and obtain requisite approvals to publish updates more efficiently to the IRM during the SLA negotiation process.

Objective 3 for FY 2024 – TAS will continue to update existing SLAs.

- Activity 1: Collaborate with the Large Business and International BOD and the Small Business/Self-Employed (SB/SE) BOD to replicate their SLAs into unique sections within the IRM.
- Activity 2: Continue to negotiate with the Wage and Investment (W&I) and SB/SE BODs to centralize Operations Assistance Request routing, where practical.

4. IDENTIFY INTAKE PROCESSING EFFICIENCIES

Taxpayers and authorized third parties have multiple ways to access TAS services. They can phone, fax, or correspond with a local TAS office or TAS's Centralized Case Intake function. They can also call the IRS and National Taxpayer Advocate toll-free phone lines, and an IRS employee can electronically refer the taxpayer or authorized third party to TAS. For most taxpayers, TAS Intake Advocates are their first point of contact. The Intake Advocate works with the taxpayer and determines if they meet our case acceptance criteria. If not, the Intake Advocate will provide the taxpayer with information about who they need to contact within the IRS. During COVID-19 and the resulting IRS backlogs, TAS struggled to manage the volume of new requests for TAS assistance, control the distribution of intake work across the TAS organization, and maintain adequate intake resources to assist taxpayers promptly. When taxpayers were unable to reach the IRS, they turned to TAS for assistance. For our challenges in timely serving taxpayers, the National Taxpayer Advocate apologizes, and together with our leadership, TAS will work to improve our services so that we will be the trusted advocate for those in need. As our inventory levels are reaching manageable numbers and new technology develops, we will continue to review our current processes to identify intake efficiencies that will improve our ability to timely assist taxpayers.

In FY 2024, TAS will continue to protect taxpayers' *right to quality service* by evaluating the TAS case intake process to make our intake process more efficient.

Objective 4 for FY 2024 – TAS will continue to comprehensively analyze the intake process with emphasis on identifying ways to enhance customer intake.

- Activity 1: Partner with the W&I Lean Six Sigma organization to identify and map our intake process steps to improve process efficiencies and effectiveness.
- Activity 2: Identify which efficiencies identified as part of the Lean Six Sigma evaluation should be started and develop an implementation plan.
- Activity 3: Identify and address the impact of COVID-19 on our work processes, including:
 - Exploring new ways to address electronic referrals of taxpayers made by IRS employees using the Accounts Management System, and
 - Ensuring taxpayer referrals meeting TAS case acceptance criteria are loaded onto the Taxpayer Advocate Management Information System quickly.
- Activity 4: Explore new technology and intake streams, such as a digital pathway for submitting Form 911, Request for Taxpayer Advocate Service Assistance (And Application for Taxpayer Assistance Order), allowing Intake Advocates to assist the most vulnerable taxpayers at the earliest opportunity.