

Top 25 Case Advocacy Issues for Fiscal Year 2021 by TAMIS¹ Receipts

Rank	Issue Code	Description	FY 2021 Case Receipts
1	315	Tax Return Filings: Unpostables and Rejects	45,665
2	045	Tax Return Filings: Pre-Refund Wage Verification Hold	36,937
3	330	Processing Amended Returns	20,961
4	310	Processing Original Returns	14,766
5	63x - 640	Earned Income Tax Credit (EITC)	14,588
6	920	Health Insurance Premium Tax Credit for Individuals under IRC § 36B	14,550
7	090	Other Refund Inquiries and Issues	11,642
8	318	Taxpayer Protection Program Unpostables	11,412
9	425	Identity Theft	9,234
10	320	Math Errors	4,983
11	010	Lost and Stolen Refunds	4,848
12	040	Returned and Stopped Refunds	4,591
13	610	Open Audits, Not EITC	4,433
14	210	Missing and Incorrect Payments	4,289
15	670	Closed Automated Underreporter	3,923
16	520	Failure-to-File / Failure-to-Pay Penalties	3,030
17	660	Open Automated Underreporter	2,797
18	470	Name and Address Changes	2,769
19	790	Other Collection Issues	2,744
20	060	IRS Offsets	2,674
21	75x	Installment Agreements	2,643
22	620	Reconsideration of Audits and Substitutes for Return under IRC § 6020(b)	2,597
23	390	Other Document Processing Issues	2,425
24	450	Form W-7, Individual Taxpayer Identification Number, Adoption Taxpayer Identification Number	2,099
25	71x	Levies	1,962
Total Top 25 Receipts			232,562
Total TAS Receipts			264,343

¹ Taxpayer Advocate Management Information System (TAMIS).

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TAS Performance Measures and Indicators

RESOLVE TAXPAYER PROBLEMS ACCURATELY AND TIMELY

Measure	Description	Fiscal Year (FY) 2021 Target	FY 2021 Cumulative ¹
Overall Quality of Case Advocacy Closed Cases	Percentage of sampled closed cases meeting the prescribed attributes of advocacy, procedural, and customer focus.	93.7%	80.3%
Advocacy Focus	Percentage of sampled closed cases where TAS advocated effectively in resolving taxpayers' issue, protecting taxpayers' rights, taking substantive actions, issuing Operations Assistance Requests (OARs) and Taxpayer Assistance Orders (TAOs), and keeping taxpayers informed.	94.7%	86.1%
Procedural Focus	Percentage of sampled closed cases where TAS took actions in accordance with the tax code, the Internal Revenue Manual (IRM), and technical and procedural requirements.	90.0%	84.7%
Customer Focus	Percentage of sampled closed cases where TAS took timely actions and adhered to disclosure requirements.	94.8%	70.9%
Taxpayer Advocate Management Information System (TAMIS) Accuracy Review	Percentage of sampled closed cases with the correct TAMIS codes.	80%	81%
OAR Reject Rate²	Percentage of TAS's rejected OAR requests for IRS operating division or function's actions.	Indicator	3.7%
Expired OAR Rate³	Percentage of OARs that were open at the end of a period where the Requested Completion Date or (if present) Negotiated Completion Date is more than five workdays overdue.	Indicator	11.2%
Customers Satisfied⁴	Percentage of taxpayers who indicate they are very satisfied or somewhat satisfied with the service provided by TAS.	88%	
Customers Dissatisfied	Percentage of taxpayers who indicate they are somewhat dissatisfied or very dissatisfied with the service provided by TAS.	Indicator	
Solved Taxpayer Problem⁵	Percentage of taxpayers from the customer satisfaction survey who indicate the TAS employee did his or her best to solve the taxpayer's problems.	88%	
Relief Granted⁶	Percentage of closed cases where TAS provided full or partial relief. This indicator includes reopened cases.	Indicator	80.0%
Number of TAOs Issued⁷	Count of TAOs issued by TAS.	Indicator	2,480

Measure	Description	Fiscal Year (FY) 2021 Target	FY 2021 Cumulative ¹
Median – Closed Case Cycle Time	Median number of days taken to close TAS cases. This indicator <i>does not</i> include reopened cases.	Indicator	64
Mean – Closed Case Cycle Time	Mean number of days taken to close TAS cases. This indicator includes reopened cases.	Indicator	96.2
Closed Cases Per Case Advocacy Full-Time Equivalents (FTEs)	Number of closed cases divided by total Case Advocacy FTEs realized. (This includes all labor hours reported to the Executive Director of Case Advocacy).	Indicator	199.4
Closed Cases Per Direct FTE	Number of closed cases divided by direct Case Advocate FTEs realized.	Indicator	652.4
Systemic Burden Receipts	Percentage of systemic burden receipts (TAS cases with criteria codes 5 through 7) compared to all receipts excluding reopened case receipts.	Indicator	44.2%
Percentage of National Taxpayer Advocate Toll-Free Calls Answered by Centralized Case Intake (CCI)	Percentage of National Taxpayer Advocate Toll-Free calls answered compared to the total number of National Taxpayer Advocate Toll-Free calls transferred to CCI.	Indicator	30.4%
CCI Created Cases	Number of cases created from intake advocate calls that meet the TAS case acceptance criteria.	Indicator	32,827
Quick Closures	Number of quick closures by all intake advocates.	Indicator	1,848
CCI Assistance Provided and No Case Created ⁸	Number of calls CCI provided assistance without creating a case or quick closure.	Indicator	31,768

PROTECT TAXPAYER RIGHTS AND REDUCE BURDEN

Measure	Description	FY 2021 Target	FY 2021 Cumulative
Overall Quality [Systemic Advocacy] ⁹	Percentage of systemic advocacy (SA) projects and immediate interventions (IIs) meeting the advocacy, customer, and procedural quality attributes' measures.	NA	Baseline
Advocacy Focus	Percentage of SA projects and IIs where SA took the appropriate actions to resolve taxpayer problems.	NA	Baseline
Customer Focus	Percentage of SA projects and IIs where SA provided substantive updates to the submitter during the initial and subsequent contacts, contacted internal and external stakeholders, wrote correspondence following established guidelines, and took outreach and education actions when appropriate.	NA	Baseline
Procedural Focus	Percentage of SA projects and IIs where SA resolved submitter's inquiries efficiently within the guidelines and timeframes prescribed and through proper workload management.	NA	Baseline
Satisfaction of Taxpayer Advocacy Panel (TAP) members ¹⁰	Percentage of satisfaction of TAP members who indicate they agree or strongly agree to the member survey question, "I have been satisfied as a member of the TAP."	85%	
Satisfaction of Systemic Advocacy Management System (SAMS) Users	Percentage of SAMS users who indicate they agree or strongly agree to the survey question, "I would recommend SAMS to others as a way to elevate systemic issues."	80%	81%
SAMS Review Process Median Days	Median count of days it takes SA to complete the three-level review process from the issue submission date to the date the issue is closed on SAMS.	Indicator	16
Projects Validated as Involving a Systemic Issue	Percentage of overall advocacy projects closed that the Director (Processing Technical Advocacy, Exam Technical Advocacy, or Collection Technical Advocacy) validates as a systemic issue.	Indicator	93.8%
Internal Management Document (IMD) Recommendations Accepted by the IRS	Percentage of TAS's IMD recommendations accepted by the IRS.	Indicator	66%
Advocacy Effort Recommendations Made to the IRS	Count of advocacy effort recommendations. Advocacy efforts include projects, taskforces, collaborative teams, Advocacy Issue Teams, and rapid response teams (excludes IMDs, Single Point of Contact (SPOC) and Annual Report to Congress).	Indicator	15

Measure	Description	FY 2021 Target	FY 2021 Cumulative
Advocacy Effort Recommendations Accepted by the IRS	Count of TAS advocacy effort recommendations accepted by the IRS. Advocacy efforts include projects, taskforces, collaborative teams, Advocacy Issue teams, and rapid response teams (excludes IMD/SPOC and Annual Report to Congress).	Indicator	15
TAP Recommendations Fully or Partially Accepted¹¹	Percentage of fully or partially accepted TAP recommendations accepted by the IRS.	Indicator	
Number of Proposed Taxpayer Advocate Directives (TADs)	Count of Proposed TADs, as defined in IRM 13.9.1, Procedures for Taxpayer Advocate Directives. A proposed TAD is a written communication from the National Taxpayer Advocate that recommends action (or forbearance of action) to address a systemic problem that affects multiple taxpayers, which TAS has brought to the attention of the responsible head of office. A proposed TAD is marked "Proposed TAD."	Indicator	1
Number of TADs Issued	Count of formal TADs, as defined in IRM 13.9.1, Procedures for Taxpayer Advocate Directives. A TAD is a statutory tool the National Taxpayer Advocate may use to elevate systemic issues that affect multiple taxpayers to ensure that IRS senior leadership is fully informed of urgent and significant issues and the National Taxpayer Advocate's recommendations to address those issues.	Indicator	1

SUSTAIN AND SUPPORT A FULLY-ENGAGED AND DIVERSE WORKFORCE

Measure	Description	FY 2021 Target	FY 2021 Cumulative
Employee Satisfaction¹²	Percentage of satisfaction of employees who respond satisfied or very satisfied to the employee satisfaction survey question, "Considering everything, how satisfied are you with your job?"	75%	
Employee Participation	Percentage of employees who take the employee satisfaction survey.	75%	

ANNUAL REPORT TO CONGRESS (ARC) RECOMMENDATIONS

Measure	Description	FY 2021 Target	Calendar Year (CY) 2020	CY 2021
ARC Administrative Recommendations Made to IRS¹³	Count of ARC administrative recommendations made by TAS to the IRS each year through the ARC.	Indicator	73	
Number of ARC Administrative Recommendations Accepted by IRS¹⁴	Count of administrative recommendations in ARC accepted by IRS.	Indicator	48	
ARC Administrative Recommendations Accepted by IRS	Percentage of total ARC recommendations accepted by IRS in the ARC compared to the total number of recommendations made.	Indicator	66%	
ARC Administrative Recommendations Implemented by IRS¹⁵	Count of the administrative recommendations accepted by IRS and implemented.	Indicator	14	
ARC Legislative Recommendations Enacted by Congress¹⁶	Count of National Taxpayer Advocate's Legislative Recommendations provided in the National Taxpayer Advocate Purple Book and enacted by Congress.	Indicator	0	4

Endnotes

- Quality results available at the time of this report are weighted, cumulative Oct. through May FY 2021 for the following categories: Overall Quality of Closed Cases, Advocacy Focus, Customer Focus, and Procedural Focus.
- OAR Reject Rate excludes reject reason business operating division/function disagrees.
- This metric is a point in time value as of the date the report is run and is not cumulative. Results will vary depending on report run date. FY 2021 BOE-BPMS report used run date Oct. 1, 2021.
- Due to neutral responses by customers, the total percentage of Customers Satisfied (FY 2020 was 82 percent) and Dissatisfied (FY 2020 was 14 percent) will not add up to 100 percent. TAS administers an internally developed customer satisfaction survey annually. FY 2021 results were not available at the time of this report.
- TAS administers an internally developed customer satisfaction survey annually. FY 2021 results were not available at the time of this report. FY 2020 results showed 82 percent for this survey question.
- TAS tracks resolution of taxpayer issues through codes entered on TAMIS at the time of closing. IRM 13.1.21.2 (Apr. 1, 2021) requires case advocates to indicate the type of relief or assistance they provided to the taxpayer. The codes reflect full relief, partial relief, or assistance provided.
- IRC § 7811 authorizes the National Taxpayer Advocate to issue a Taxpayer Assistance Order when a taxpayer is suffering or about to suffer a significant hardship as a result of the manner in which the tax laws are being administered.
- Data only reflects activity of intake advocates in CCI sites using the Aspect phone system and does not include activity of intake advocates in local offices that do not have the Aspect system.
- In FY 2021, TAS revised IRM 13.2, Systemic Advocacy, and its quality review process; therefore, FY 2021 metrics are considered as a baseline year. Effective FY 2021, TAS discontinued the SA dialogue process and combined the product lines for Advocacy Projects and Immediate Intervention. TAS recategorized the attributes from Accuracy, Communication, and Timeliness to the focus areas of Advocacy, Customer, and Procedural.
- The Taxpayer Advocacy Panel survey is administered to all panel members. Results were not available at the time of this report.
- Results were not available at the time of this report.
- Employee satisfaction (67 percent for FY 2020) and employee participation (62 percent for FY 2020) are from the annual Federal Employee Viewpoint Survey (FEVS). The Office of Personnel Management (OPM) administers the annual FEVS. Due to delays as a result of COVID-19, OPM has decided to administer a sample survey for FY 2021 that it will send to a limited number of IRS employees beginning in November 2021. Results will be available at the IRS level only. OPM plans on returning to the normal schedule with a full census survey in the spring of FY 2022.
- The 2020 Annual Report to Congress is dated December 31, 2020, and was released to Congress and the public on January 13, 2021. The 2020 report included administrative recommendations proposed to the IRS in the Most Serious Problems section, the Most Litigated Issues Section, and in the TAS Research Study.
- The IRS's responses to administrative recommendations for CY 2020 are included in the National Taxpayer Advocate Fiscal Year 2022 Objectives Report to Congress released in June 2021.
- The counts are not final as the IRS is continually working open recommendations.
- The count for CY 2021 is through September 2021 and can change when the final list of legislative recommendations enacted by Congress is published as Appendix 2 of the National Taxpayer Advocate 2022 Purple Book released in January 2022.

Glossary of Acronyms

ACRONYM	DEFINITION
AAR	Administrative Adjustment Request
ABA	American Bar Association
ACA	Affordable Care Act
ACS	Automated Collection System
ACSI	American Customer Satisfaction Index
ACTC	Additional Child Tax Credit
ACUS	Administrative Conference of the United States
ADVCTC	Advance Child Tax Credit
AGI	Adjusted Gross Income
AI	Artificial Intelligence
AIA	Anti-Injunction Act
AIMS	Audit Information Management System
ALE	Allowable Living Expense
AM	Accounts Management
AMS	Accounts Management System
AO	Appeals Officer
AOC	American Opportunity Credit
AOD	Action on Decision
AOTC	American Opportunity Tax Credit
APTC	Advance Premium Tax Credit
ARC	Annual Report to Congress
ARPA	American Rescue Plan Act
ATE	Appeals Technical Employee
ATIN	Adoption Taxpayer Identification Number
AUR	Automated Underreporter
BBB	Build Back Better
BMF	Business Master File
BOD	Business Operating Division
BOE	Business Objects Enterprise
BOLA	Business Online Account
BPMS	Business Performance Management System
BPR	Business Performance Review
BSM	Business Systems Modernization
CADE	Customer Account Data Engine

ACRONYM	DEFINITION
CAF	Centralized Authorization File
CAP	Collection Appeals Program
CAR	Collection Activity Report
CARES	Coronavirus Aid, Relief, and Economic Security Act
CBO	Congressional Budget Office
CCB	Customer Callback
CCDM	Chief Counsel Directives Manual
CCI	Centralized Case Intake
CDC	Centers for Disease Control and Prevention
CDP	Collection Due Process
CDW	Compliance Data Warehouse
CEN	Crimes Enforcement Network
CEO	Chief Executive Officer
CFO	Chief Financial Officer
CI	Criminal Investigation (Division)
CIS	Collection Information Statement
CNC	Currently Not Collectible
CNMI	Commonwealth of the Northern Mariana Islands
COVID-19	Coronavirus Disease 2019
CP	Computer Paragraph
CPA	Certified Public Accountant
CSP	Credential Service Provider
CSR	Customer Service Representative
CTAS	Comprehensive Taxpayer Attitude Survey
CTC	Child Tax Credit
CTCUP	Child Tax Credit Update Portal
CY	Calendar Year
DAWSON	Docket Access Within a Secure Online Network
DDIA	Direct Debit Installment Agreement
DO	Delegation Order
DOJ	Department of Justice
DSP	Disability Severance Pay
DUT	Documentation Upload Tool

ACRONYM	DEFINITION
EA	Enrolled Agent
EB	Economic Burden
ECM	Enterprise Case Management
EDCMO	Enterprise Digitization and Case Management Office
EDL	Electronic Docket Listing
EFTPS	Electronic Federal Tax Payment System
EIC	Earned Income Credit
EIN	Employer Identification Number
EIP	Economic Impact Payment
EITC	Earned Income Tax Credit
EPST	Enterprise Planning Scenario Tool
ERS	Error Resolution System
ESL	English as a Second Language
ETAAC	Electronic Tax Administration Advisory Committee
ETARAS	Electronic Tax Administration Research and Analysis System
FAFSA	Free Application for Federal Student Aid
FAQ	Frequently Asked Question
FATCA	Foreign Account Tax Compliance Act
FBAR	Report of Foreign Bank and Financial Accounts
FDIC	Federal Deposit Insurance Corporation
FEVS	Federal Employee Viewpoint Survey
FFI	Foreign Financial Institution
FICA	Federal Insurance Contributions Act
FPLP	Federal Payment Levy Program
FRCP	Federal Rules of Civil Procedure
FS	Filing Season
FTD	Failure to Deposit
FTE	Full-Time Equivalent or Failure to Pay Estimated Tax
FTF	Failure-to-File
FTP	Failure-to-Pay
FY	Fiscal Year
GAO	Government Accountability Office
GDP	Gross Domestic Product
GS	General Schedule

ACRONYM	DEFINITION
HAB	Highest Aggregate Balance
HCO	Human Capital Office
HOH	Head of Household
HR	Human Resources
IA	Installment Agreement
ICAM	Identity, Credential, and Access Management
ID	Identification
IDEA	Integrated Digital Experience Act
IGM	Interim Guidance Memorandum
IMD	Internal Management Document
IMF	Individual Master File
IP PIN	Identity Protection Personal Identification Number
IRB	Internal Revenue Bulletin
IRC	Internal Revenue Code
IRM	Internal Revenue Manual
IRS	Internal Revenue Service
IRSU	IRS University
IRTF	Individual Return Transaction File
IT	Information Technology
ITIN	Individual Taxpayer Identification Number
JCT	Joint Committee on Taxation
JOC	Joint Operations Center
LB&I	Large Business and International Operating Division
LII	Low Income Indicator
LITC	Low Income Taxpayer Clinic
LLC	Limited Liability Company
LOS	Level of Service
LR	Legislative Recommendation
LTA	Local Taxpayer Advocate
MAGI	Modified Adjusted Gross Income
MEF	Modernized e-File
MFS	Married Filing Separately
MLI	Most Litigated Issue
MOU	Memorandum of Understanding
MSP	Most Serious Problem

ACRONYM	DEFINITION
NFTL	Notice of Federal Tax Lien
NIST	National Institute of Standards and Technology
NMP	Net Misreporting Percentage
NOL	Net Operating Loss
NR	Non-Resident
NRP	National Research Program
NTA	National Taxpayer Advocate
NTEU	National Treasury Employees Union
OAR	Operations Assistance Request
OBR	Offset Bypass Refund
OCC	Office of the Comptroller of the Currency or Office of Chief Counsel
OCR	Optical Character Recognition
ODC	Other Dependent Credit or Credit for Other Dependents
OIC	Offer in Compromise
OJT	On-the-Job Training
OLS	Online Services
OMB	Office of Management and Budget
OPA	Online Payment Agreement
OPM	Office of Personnel Management
OPR	Office of Professional Responsibility
PCA	Private Collection Agency
PDF	Portable Document Format
PGLD	Privacy, Governmental Liaison and Disclosure
PIAA	Program Integrity Allocation Adjustment
PIN	Personal Identification Number
PLR	Private Letter Ruling
PMTA	Program Manager Technical Advice
POA	Power of Attorney
PP	Pay Period
PPS	Practitioner Priority Service
PR	Partnership Representative
PTC	Premium Tax Credit
PTIN	Preparer Tax Identification Number
PY	Processing Year
PYEI	Prior Year Earned Income

ACRONYM	DEFINITION
Q&A	Question and Answer
QBI	Qualified Business Income
QR	Quick Response
QRP	Quality Review Program
RAAS	Research, Applied Analytics, and Statistics
RAD	Research Analysis and Data
RAR	Revenue Agent Report
RCP	Reasonable Collection Potential
REIT	Real Estate Investment Trust
RIC	Regulated Investment Company
RICS	Return Integrity and Compliance Services or Return Information Control System
RIVO	Return Integrity Verification Operation
ROI	Return on Investment
RPA	Robotics Process Automation
RRA 98	Internal Revenue Service Restructuring and Reform Act of 1998
RRB	Railroad Retirement Board
RRC	Recovery Rebate Credit
SA	Systemic Advocacy
SADI	Secure Access Digital Identity
SAMS	Systemic Advocacy Management System
SARS	Severe Acute Respiratory Syndrome
SB/SE	Small Business/Self-Employed Operating Division
SBA	Small Business Administration
SCRIPS	Service Center Recognition/Image Processing System
SECA	Self-Employment Contributions Act
SERP	Servicewide Electronic Research Program
SES	Senior Executive Service
SFS	Secure File Sharing
SIGTARP	Special Inspector General for the Troubled Asset Relief Program
SM	Secure Messaging
SND	Statutory Notice of Deficiency
SPEC	Stakeholder Partnerships, Education and Communication
SPOC	Single Point of Contact

ACRONYM	DEFINITION
SSA	Social Security Administration
SSN	Social Security Number
STARS	Strategic Talent Analytics & Recruitment Solutions
TAC	Taxpayer Assistance Center
TAD	Taxpayer Advocate Directive
TAMIS	Taxpayer Advocate Management Information System
TAO	Taxpayer Assistance Order
TAP	Taxpayer Advocacy Panel
TARD	Taxpayer Advocate Received Date
TAS	Taxpayer Advocate Service
TASIS	Taxpayer Advocate Service Integrated System
TBOR	Taxpayer Bill of Rights
TCE	Tax Counseling for the Elderly
TCJA	Tax Cuts and Jobs Act
TCMP	Tax Compliance Measurement Program
TDC	Taxpayer Digital Communication
TE/GE	Tax Exempt and Government Entities Operating Division
TFA	Taxpayer First Act
TFRP	Trust Fund Recovery Penalty
TIGTA	Treasury Inspector General for Tax Administration
TIN	Taxpayer Identification Number
TL	Tax Litigation
TPC	Third Party Contact
TPI	Total Positive Income
TPP	Taxpayer Protection Program
TXO	Taxpayer Experience Office
TY	Tax Year
UC	Unemployment Compensation
UF	User Fee
USAS	USA Staffing
USC	United States Code
USTC	United States Tax Court
VA	Veterans Administration
VITA	Volunteer Income Tax Assistance

ACRONYM	DEFINITION
VSD	Virtual Service Delivery
W&I	Wage and Investment Operating Division
WEBSD	Web Service Delivery
WL	Westlaw
WMR	Where's My Refund