

IRM PROCEDURAL UPDATE

DATE: 04/23/2025

NUMBER: ts-04-0425-0472

SUBJECT: Adding the Time Frame for a Supervisor Callback

AFFECTED IRM(s)/SUBSECTION(s): 4.19.19.4.1

CHANGE(s):

IRM 4.19.19.4.1, CEAS Action Note, Adding the time frame for a Supervisor callback.

(1) A CEAS action note is the summary of a call or a referral that requires immediate action.

(2) Employees are expected to avoid creating a CEAS action note by taking ownership of the case and addressing the taxpayer's questions.

(3) Do not input a CEAS action note on closed or archived CEAS records with Hold Code "X".

(4) If the address is updated on Master File and the new address does not match the CEAS address, the assigned campus must be notified using an action note. This does not apply to closed or archived CEAS records with Hold Code "X".

(5) If the taxpayer provides a new or updated phone number during a call where a CEAS action note is required, the new or updated phone number can be included in the action note.

(6) If the taxpayer requests a manager return call; include the best time to call and the contact phone number to reach the taxpayer. Advise the taxpayer that someone will return their call within 5 business days.