



MANUAL TRANSMITTAL

Department of the Treasury
Internal Revenue Service

13.1.22

AUGUST 4, 2022

EFFECTIVE DATE

(08-04-2022)

PURPOSE

- (1) This transmits revisions to IRM 13.1.22, Taxpayer Advocate Service, Taxpayer Advocate Case Procedures, Manual Inventory Balancing Procedures.

MATERIAL CHANGES

- (1) Editorial, formatting, and grammar were made throughout the document.
- (2) IPU 20U0408 issued 03-11-2020 IRM 13.1.22.7.1, Added new section to reinstate guidance from IGM TAS-13-0519-0008, Interim Guidance on the time requirements for transferring a case received via the TAS AMS Centralized e-911 Inventory using National Inventory Balancing.
- (3) IRM 13.1.22.1.7, updated related resources.
- (4) IRM 13.1.22.3, updated reference to *Bulk Receipts* IRM 13.1.16.16.4.
- (5) IRM 13.1.22.5, updated New Hire and OJI level of availability percentages using the Zip Code Field of the TAMIS Employee Screen.
- (6) IRM 13.1.22.6, clarified new TAMIS receipts, and updated various IRM references.
- (7) IRM 13.1.22.7.1, updated naming of Centralized AMS queues, and updated various IRM references.
- (8) IRM 13.1.22.8, deleted this IRM section and updated references to the *Bulk Receipts* IRM 13.1.16.16.4.
- (9) IRM 13.1.22.9, updated links to the *Spanish Partnership Chart*, and added Spanish Partnership Office information to the Zip Code Routing Tool.
- (10) IRM 13.1.22.10.2, updated Intake Adjustments to weekly instead of quarterly, removed link to Intake Time Adjustment Chart since adjustment is calculated weekly as part of N-WLB calculations.

EFFECT ON OTHER DOCUMENTS

This IRM supersedes IRM 13.1.22, Taxpayer Advocate Service, Taxpayer Advocate Case Procedures, Manual Inventory Balancing Procedures dated October 29, 2019. IRM Procedural Update (IPU) 20U0371 issued on 03/11/2022 to re-validate IPU 22U0408 issued 03/11/2020 is incorporated into this IRM.

AUDIENCE

Taxpayer Advocate Service employees.

Bridget T. Roberts
Deputy National Taxpayer Advocate

13.1.22

Manual Inventory Balancing Procedures

Table of Contents

13.1.22.1 Program Scope and Objectives

13.1.22.1.1 Background

13.1.22.1.2 Authority

13.1.22.1.3 Responsibilities

13.1.22.1.4 Program Reports

13.1.22.1.5 Terms

13.1.22.1.6 Acronyms

13.1.22.1.7 Related Resources

13.1.22.2 Introduction

13.1.22.3 TAS National Office Responsibilities

13.1.22.4 Deferral Rules

13.1.22.5 Accounting for a New Hire and On-the-Job Instructor (OJI)

13.1.22.6 Case Eligibility

13.1.22.7 Time Requirements for Transferring a Case

13.1.22.7.1 Exception on Time Requirements for Transferring a Case Received via the TAS AMS
Centralized e-911 Inventory Using National Workload Balancing

13.1.22.8 Special Instructions for Spanish Cases

13.1.22.9 Adjustments to Case Advocate Count

13.1.22.9.1 Permanent Part-Time Case Advocates

13.1.22.9.2 Intake Time Adjustment

13.1.22.9.2.1 Small Office Adjustment

Exhibits

13.1.22-1 TAMIS Employee Screen

13.1.22.1
(10-29-2019)
Program Scope and Objectives

- (1) *Purpose.* This section provides the procedures for the transfer of work for workload balancing purposes.
- (2) *Audience.* These procedures apply to TAS Case Advocacy employees determining when to transfer a case for workload balancing purposes.
- (3) *Policy Owner.* The Executive Director Case Advocacy, Intake & Technical Support (EDCA-ITS), who is under the Deputy National Taxpayer Advocate (DNTA).
- (4) *Program Owner.* The Executive Director Case Advocacy (EDCA), who is under the DNTA.

13.1.22.1.1
(10-29-2019)
Background

- (1) To balance workload across the TAS organization, a national workload balancing (N-WLB) system was instituted on May 5, 2006.

13.1.22.1.2
(10-29-2019)
Authority

- (1) Pursuant to IRC § 7803(c), the Office of the Taxpayer Advocate (known as the Taxpayer Advocate Service (TAS)) shall assist taxpayers to resolve problems with the IRS.

13.1.22.1.3
(10-29-2019)
Responsibilities

- (1) The N-WLB Coordinator is responsible for managing the national workload balancing program, providing guidance to the Local Taxpayer Advocate (LTA) offices, and determining when it is appropriate to transfer cases using workload balancing procedures. The N-WLB Coordinator reports to the EDCA-ITS.
- (2) TAS case advocacy employees are responsible for completing the TAMIS transfer procedures.
- (3) Case Advocacy managers are responsible for making case assignments and ensuring employees within their purview are following the workload balancing procedures contained in this IRM.

13.1.22.1.4
(10-29-2019)
Program Reports

- (1) Reports to monitor the appropriate and timely routing of TAS cases using workload balancing procedures are derived from Taxpayer Advocate Management Information System (TAMIS) and the Case Quality Review System (CQRS).
 - a. The CQRS generates monthly and fiscal year cumulative reports as well as specific queries for data analysis.
 - b. TAS uses Business Objects Enterprise (BOE) to generate reports to monitor office inventory levels and case transfers.

13.1.22.1.5
(10-29-2019)
Terms

- (1) The following table contains a list of terms used throughout this IRM.

Term	Definition
Active Status	When a case advocate (CA) or bilingual case advocate (BCA) is available to accept cases.

Term	Definition
Bulk Receipts	Bulk receipts involve a group of cases generally originating from a single source, or created by the same event with impact to multiple taxpayers.
Case Acceptance Determination	A TAS employee performing case intake will determine whether the taxpayer's circumstances meet the criteria that TAS has identified that qualify taxpayers for TAS assistance.
Case Eligibility	Rules used to determine whether a case is eligible for N-WLB.
Case Intake	The procedures TAS employees perform when TAS receives a taxpayer inquiry.
Deferral Status	When a CA/BCA will be out of the office for one week or more but less than 45 calendar days.
English Case	Any case where the taxpayer's language is identified as other than Spanish or where the taxpayers speaks Spanish, but the Power of Attorney (POA) speaks English and the box in line 2 of Form 2848 is checked.
Intake Time Adjustment	A reduction to the active CA/BCA count to recognize intake activities performed in the office.
Manual Inventory Balancing	The procedures applied to the transfer of work for workload balancing purposes.
National Workload Balancing	The procedures applied to the transfer of work for workload balancing purposes.
Permanent Part-Time Case Advocate Adjustment	An adjustment made to the active CA/BCA count for a permanent part-time employee.
Receiving Office	The office receiving a case that has been transferred by the TAS office where the case originated.
Small Office	An office having no Taxpayer Advocate Group Manager (TAGM) or analyst and five or less case advocates.

Term	Definition
Spanish Case	Any cases where the taxpayer speaks Spanish and all contact with the taxpayer is in Spanish, or the taxpayer and the POA speaks Spanish, or the taxpayer speaks Spanish and the POA speaks English and the box in line 2 of Form 2848 is not checked.
Taxpayer Advocate Received Date	The date TAS received the taxpayer's inquiry.
Transfer Guidelines	A set of guidelines listing where TAS will route a case that has a specific issue identified by the guidelines.
Zip Code Routing	The tool used by TAS to identify by zip code where the case will be worked.

13.1.22.1.6
(10-29-2019)
Acronyms

- (1) The following table contains a list of acronyms and their definitions used throughout this IRM.

Acronym	Definition
AMS	Accounts Management System
BCA	Bilingual Case Advocate
CA	Case Advocate
COB	Close of Business
DNTA	Deputy National Taxpayer Advocate
EDCA	Executive Director Case Advocacy
EDCA-ITS	Executive Director Case Advocacy, Intake & Technical Support
EEO	Equal Employment Opportunity
ESD	Employee Support and Development
FUTA	Federal Unemployment Tax Act
IA	Intake Advocate
LTA	Local Taxpayer Advocate

Acronym	Definition
NTEU	National Treasury Employees Union
N-WLB	National Workload Balancing
OJI	On-the-Job Instructor
POA	Power of Attorney
QRDB	Quality Review Database
SBREFA	Small Business Regulatory Enforcement Fairness Act
SFC	Senate Finance Committee
TAGM	Taxpayer Advocate Group Manager
TAMIS	Taxpayer Advocate Management Information System
TARD	Taxpayer Advocate Received Date
TAS	Taxpayer Advocate Service
TRC	Transfer Reason Code
ZCR	Zip Code Routing

13.1.22.1.7
(08-04-2022)

Related Resources

- (1) TAS employees will use the following resources in conjunction with this IRM to determine where a case should be routed:
 - *TAS Case Transfer Guidelines;*
 - *TAS Office Locations by Zip Code Tool;* and
 - *TAMIS User Guide*
- (2) This is a list of relevant IRMs TAS case advocacy employees will use when routing a case:
 - IRM 13.1.11, *Case and Inventory Management;*
 - IRM 13.1.8, *Congressional Affairs Program;*
 - IRM 13.1.16, *Receipt and Intake of TAS Cases;*
 - IRM 13.1.16-9, *Completing Initial Actions During Intake Guide;*
 - IRM 13.1.17, *Transferring TAS Cases;* and
 - IRM 13.1.18, *Resolving TAS Cases.*

13.1.22.2
(10-29-2019)
Introduction

- (1) These procedures apply to the transfer of work for workload balancing purposes only. The rules outlined here apply to both English and Spanish cases.
- (2) For N-WLB purposes, there are two (2) types of cases; English and Spanish.
 - a. An English case is defined as any case where:

- The taxpayer's language is identified as other than Spanish; or,
 - The taxpayer speaks Spanish, but the POA speaks English and the box in line 2 under Name and Address, of Form 2848, *Power of Attorney and Declaration of Representative*, **is** checked (i.e., indicating notices are going to the POA and the taxpayer). English should be entered as the taxpayer's language on TAMIS.
- b. A Spanish case is defined as any case where:
- The taxpayer speaks Spanish and all contact with the taxpayer is in Spanish; or,
 - The taxpayer speaks Spanish and the POA speaks Spanish; or,
 - The taxpayer speaks Spanish, the POA speaks English, and the box in line 2 under Name and Address of Form 2848 is **not** checked (i.e., notices are not going to the POA).

13.1.22.3
(08-04-2022)
**TAS National Office
Responsibilities**

- (1) Each Monday morning, the N-WLB coordinator will generate a series of reports to determine the offices involved in N-WLB through the following Friday.
- (2) Using the definitions in IRM 13.1.22.2, the inventory for each office is broken down to show Spanish and English open inventory. Open inventory includes all cases assigned to a CA or BCA in active status, and:
 - a. All cases with a status not equal to C (closed);
 - b. Criteria codes 1-9;
 - c. All TAS assigned Congressional cases;
 - d. All regular and reopened cases; and
 - e. 50 percent of cases identified as Bulk. See IRM 13.1.16.15.3, *Bulk Receipts* for the definition of a bulk case.
- (3) The number of available CAs and BCAs is determined on Monday morning. Available CAs and BCAs are those in active status on the (TAMIS).
- (4) Adjustments are made automatically to the active CA/BCA counts for:
 - a. Permanent part-time employees (CA/BCA);
 - b. Small offices (offices with less than five CAs);
 - c. Time spent by non-Intake Advocates (IA) performing intake work; and
 - d. New hires and on-the-job instructors (OJI) on partial availability. See IRM 13.1.22.5, *Accounting for a New Hire and OJI*.
- (5) From these reports, the following information is calculated:
 - a. Each office's average English inventory per CA. This is determined by the open English inventory as defined in IRM 13.1.22.2, Introduction, divided by the number of active non-BCAs.
 - b. Each office's average Spanish inventory per BCA. This is determined by the open Spanish inventory as defined in IRM 13.1.22.2, divided by the number of active BCAs.
 - c. The national average English inventory per CA. This is determined by the open English inventory as defined in IRM 13.1.22.2, divided by the number of active non-BCAs.
 - d. The national average Spanish inventory per BCA. This is determined by the open Spanish inventory as defined in IRM 13.1.22.2, divided by the number of active BCAs.

- (6) The following conditions are used to determine an office's eligibility to receive or send cases for English or Spanish N-WLB, and the number of cases they are eligible to receive on both a daily and weekly basis (English and Spanish eligibility are determined separately):
 - a. The standard to compare offices' inventories is the national average inventory per CA/BCA.
 - b. Any office with plus or minus (+/-) five cases from the national average is eligible to send or receive cases, respectively.
 - c. The maximum number of cases a receiving office is eligible to receive is one case per active CA/BCA per day.
- (7) Each LTA office will have two designated recipients for N-WLB email messages.
- (8) Once the N-WLB determinations are made, all inventory balancing coordinators will receive an email providing the English and Spanish national averages and a summary of the English and Spanish transfers for the time period covered.

Note: An office may send cases to, or receive cases from, more than one office.

13.1.22.4
(10-29-2019)
Deferral Rules

- (1) It is the responsibility of the LTA offices to appropriately apply the deferral rules.
- (2) When a CA/BCA will be out of the office for one week or more (*i.e.*, **seven or more consecutive calendar days**) but less than 45 calendar days, the Inactive Indicator field on the TAMIS Employee Screen must be changed to **deferral** by close of business (COB) the workday prior to the CA/BCA's scheduled departure. Examples include:
 - a. CA/BCA is on extended leave (including annual and sick leave);
 - b. A detail outside of TAS; or,
 - c. On non-casework assignment (e.g., full-time NTEU/EEO).

Note: Deferral status does not require reassignment of the CA/BCA inventory. However, if the CA/BCA will be out of the office for more than 45 calendar days, his or her open inventory must be reassigned and the employee's status on TAMIS should be changed to **inactive**.
- (3) Documentation (e.g., e-mail) including dates, is required for non-casework assignments and must be sent to the headquarters' N-WLB coordinator, through the area coordinator, by COB the day the CA/BCA is to be placed in deferral status. If the work assignment is for a national project, the documentation must come from the office responsible for the project (*e.g.*, Employee Support and Development (ESD) for training assignments, EDCA for case project assignments, etc.)
- (4) By COB one workday prior to the return of the CA/BCA, change the Inactive Indicator field on the TAMIS Employee Screen to **active** status.
- (5) If a CA/BCA is retiring or permanently leaving the CA/BCA position, the employee may be placed in **deferral** status **20 calendar days prior to the scheduled departure date**.
- (6) Offices **may not** place a CA/BCA used as an IA in deferral status.

- (7) The same deferral rules and procedures apply for an IA.
- (8) The intake time adjustment is adjusted to account for an IA in deferral status. The office must advise the N-WLB Coordinator of the deferral. See IRM 13.1.22.9.2, *Intake Time Adjustment*.

13.1.22.5
(08-04-2022)
Accounting for a New Hire and On-the-Job Instructor (OJI)

- (1) These procedures apply to a CA/BCA new hire and a CA/BCA serving as an OJI, and provide the mechanics for implementing the Deferral Guidelines issued by the EDCA office.
- (2) The steps outlined in this section allow the process to be automated, and N-WLB to ensure the CA/BCA is appropriately counted.
- (3) A new hire or OJI meeting the guidelines in IRM 13.1.22.4, *Deferral Rules* may be placed in deferral status.
- (4) During the period of time an OJI or new hire is 100 percent deferred, their status on TAMIS is updated to deferral. Once the OJI or new hire has moved out of the 100 percent deferral period, their status on TAMIS is updated to active.
- (5) For the OJI, the Deferral Guidelines gradually increase the level of availability until the training period is completed. No matter the employee's status, active or deferral, their availability will be adjusted by following these steps:
 - a. The 3rd box of the Street Address Zip Code field on the Employee Screen is used to track the OJI through the training process. See the figure in Exhibit 13.1.22-1, *TAMIS Employee Screen*
 - b. Values are entered in the 3rd box of the Street Address Zip Code field as 250 (25 percent available) or 500 (50 percent available).
- (6) Anytime a value is entered in the 3rd box of the zip code field, 0000 must also be entered in the 2nd box of the zip code field.

Example: An employee falling in the 25 percent available range (75 percent deferred) should have the 2nd box of the Street Address Zip Code field on the Employee Screen updated to 0000, and the 3rd box updated to 250.

- (7) It is the responsibility of each local and Area office to ensure the zip code field is updated no later than the day before the next training phase begins.

13.1.22.6
(08-04-2022)
Case Eligibility

- (1) The following type of case is **eligible** for N-WLB:
 - a. New receipt – An English or Spanish case received after an office opens on Monday morning of each week, or a case received on the previous Friday not loaded on TAMIS;

Note: A case received and loaded to TAMIS anytime on Friday, but not assigned to a CA/BCA is counted in open inventory and is not eligible for N-WLB the following Monday.
 - b. Non-filers meeting the new receipt definition in (a) above;
 - c. Correspondence specifically addressed to a LTA office; and,

- d. Correspondence addressed to the LTA. Note: Follow procedures in IRM 13.1.17.5(3), *TAS Transfer Time Frames and Initial Contact Requirements* for those cases where the taxpayer has contacted the office or LTA directly.
- (2) Cases **not eligible** for N-WLB are:
- a. Cases meeting transfer criteria per the *TAS Case Transfer Guidelines*;
 - b. TAS Congressional cases;
 - c. Cases originating from the National Taxpayer Advocate's (NTA's) office;
 - d. Senate Finance Committee (SFC) cases;
 - e. Small Business Regulatory Enforcement Fairness Act (SBREFA) cases;
 - f. Reopened cases;
 - g. Cases meeting the Bulk definition. See IRM 13.1.16.15.3, *Bulk Receipts*;
 - h. Cases identified on TAMIS as e-Trak;
 - i. Cases referred from a Low Income Tax Clinic (LITC); and
 - j. Schemes.
- (3) N-WLB is for cases remaining in an office after applying transfer criteria and Zip Code routing. Before transferring a case for N-WLB:
- a. First apply *TAS Case Transfer Guidelines*,
 - b. If there is no transfer criteria, second apply Zip Code routing.
- (4) If a sending office **cannot meet its daily allotment of cases**, it may review **receipts and transfers-in** for one of the issues listed below. **Only these issues** are allowed as an **exception** to the transfer guidelines for N-WLB purposes, and only if an office cannot meet its daily allotment of cases to transfer. This exception only applies to offices **eligible** to transfer out work under N-WLB.
- FUTA – Open
 - FUTA – Closed
- (5) A case should not be transferred multiple times. This is generally not in the taxpayer's best interest. A case transferred to balance inventories **should not be transferred again**. When working with the taxpayer, TAS can improve the taxpayer's experience with the IRS by working expeditiously with the taxpayer. Case transfers should be transparent to the taxpayer, i.e., the taxpayer should not notice a delay. For some situations, any delay by TAS could mean TAS is unable to grant relief.
- (6) Use **TAMIS transfer reason code 0 (zero)** when transferring a case for N-WLB. This transfer reason code (TRC) is only used when transferring a case for N-WLB.
- (7) Area balancing is only allowed for egregious situations and **must** be coordinated in advance with both the EDCA-ITS inventory analyst and the N-WLB coordinator.
- (8) Advance knowledge of events requiring new receipts to be re-routed is considered when determining the volume of cases a site can receive. These events may include: training events, office moves, Tax Forums, etc.

13.1.22.7
(08-04-2022)
**Time Requirements for
Transferring a Case**

- (1) All cases must be transferred within one workday from the Taxpayer Advocate Received Date (TARD). Sending the case timely is essential, especially with time-sensitive issues, when working with the taxpayer, TAS can improve the taxpayer's experience with the IRS by working expeditiously with the taxpayer. Case transfers should be transparent to the taxpayer, i.e., the taxpayer should not notice a delay. For some situations, any delay by TAS could mean TAS is unable to grant relief.
- (2) The daily transfer deadline is as follows:
 - Monday – 3 p.m. local time of the transferring office.
 - Tuesday through Friday – 1:30 p.m. local time of the transferring office.

Exception: If a federally observed holiday falls on Monday, transfers are allowed until 3 p.m. local time on the subsequent day.

- (3) There will be no catch up if the daily quota is not met.

Example: If an office can transfer five cases per day but only transfers two on a given day, the office **cannot** send eight cases the next day.

- (4) Use the first in/first out method for selecting a case for N-WLB.
- (5) On the TAMIS inventory screen, cases are listed in criteria code order. To select a case, use a sequential order by case file number.
- (6) If an office is sending cases to more than one office, alternate the receiving offices to avoid overloading one particular office.

13.1.22.7.1
(08-04-2022)
**Exception on Time
Requirements for
Transferring a Case
Received via the TAS
AMS Centralized e-911
Inventory Using National
Workload Balancing**

- (1) For TAS cases received via the Centralized Area AMS queues, the time required has been modified to one workday **from the date the case was loaded from AMS into TAMIS**.
- (2) This change is designed to prevent taxpayers' cases from being transferred multiple times, which causes delays in resolving the taxpayers' issues. These delays can sometimes prevent TAS from providing relief. In addition, expeditious resolution of the taxpayers' problems can improve their experience with the IRS.
- (3) TAMIS is programed to ensure the requirements in IRM 13.1.17.5, *TAS Transfer Time Frames and Initial Contact Requirements*, are followed; and will prevent cases being transferred on or after the Initial Contact Date is due. If this programming prevents a transfer, TAS employees must not change the TARD or otherwise manipulate the data in TAMIS to transfer the case. Instead, take the following actions to transfer the case:
 - a. The Transferring Office will send an email to tas.inventory@irs.gov including the TAMIS case file number and the ORG number of the Receiving Office.
 - b. EDCA-ITS employees with authority to bypass the transfer restriction in TAMIS will transfer the case to the Receiving Office. They will also input ****TRANSFER**** into the TAMIS History.
 - c. The Receiving Office is required to complete the Initial Contact per IRM 13.1.18.6, *Initial Contact Completed by Case Advocates*. The requirements regarding contacting the taxpayer prior to transfer in IRM 13.1.17.5 are suspended, as the contact will be performed by the receiving office.

Note: For these cases the TARD is the date TAS received the inquiry on AMS, not the date the case is loaded from AMS to TAMIS. It is critical that we know the correct date the case was received by TAS and offices must not change this date.

- (4) If an organization, other than the Centralized Area AMS queues, is unable to meet the transfer timeframes in IRM 13.1.22.7 or IRM 13.1.17.5 for cases received from AMS due to unforeseen circumstances beyond the organization's control, the manager may contact the EDCA - ITS, to request temporary inclusion in these procedures.
- (5) TAS is implementing this process to alleviate a backlog of AMS cases in a manner that will ensure TAS is assisting the taxpayer as soon as possible. It will not be used for other types of transfers that are prevented by TAMIS programming.

13.1.22.8
(08-04-2022)

Special Instructions for Spanish Cases

- (1) When documenting a case on AMS or TAMIS, ensure the taxpayer's language is coded correctly. Code the taxpayer language according to the language the taxpayer wants to use when discussing his or her problem. A Spanish case is defined as any case where:
 - a. The taxpayer speaks Spanish and all contact with the taxpayer is in Spanish;
 - b. The taxpayer speaks Spanish and the POA speaks Spanish; or,
 - c. The taxpayer speaks Spanish, the POA speaks English, and the box in line 2 under Name and Address of Form 2848 is **not** checked (i.e., notices are not going to the POA).
- (2) English is entered as the taxpayer's language on TAMIS when the taxpayer speaks Spanish, but the POA speaks English and the box line 2 under Name and Address of Form 2848 **is** checked (i.e., notices are going to the POA and the taxpayer).
- (3) If your office has no BCA, use the *Spanish Partnership Chart* at https://organization.ds.irsnet.gov/sites/tas/files/PolicyandProcedure/InventoryBalancing/BSP_N-WLB-SpanishPartnership.docx to determine the TAS office to transfer the Spanish language case. The Spanish Partnership Office is also viewable when transferring cases using the *TAS Office Locations by Zip Code Tool*. However, if an office without a BCA receives a Congressional case, the office will retain the case and work with a BCA in its partnership office.
- (4) Use TRC 1 for transfers to your partner office as identified in the *Spanish Partnership Chart*.

13.1.22.9
(10-29-2019)

Adjustments to Case Advocate Count

- (1) The following sections outline various adjustments to the case advocate count under N-WLB.

13.1.22.9.1
(01-19-2016)

Permanent Part-Time Case Advocates

- (1) An adjustment is made to the office's active CA/BCA count for a permanent part-time employee.
- (2) Any changes to a part-time schedule must be communicated to the headquarters' N-WLB coordinator.

13.1.22.9.2
(08-04-2022)

Intake Time Adjustment

- (1) A reduction to the active CA/BCA count is made by the headquarters' N-WLB coordinator to recognize intake activities performed in the office.
- (2) The adjustment is based on the percentage of time spent performing intake work during the prior week, and is modified weekly.
- (3) An office's intake adjustment will be reduced, but not below zero, by the number of active IAs in the office.

Example: An office with a computed intake time adjustment of 1.25 has one IA. The office receives an intake time adjustment of .25.

- (4) An office must notify the headquarters' N-WLB coordinator of changes to IA staffing.

13.1.22.9.2.1
(01-19-2016)

Small Office Adjustment

- (1) A small office is defined as one having no TAGM or analyst, **and** five or less case advocates.
- (2) A CA/BCA in a smaller office is more likely to perform ancillary duties other than case work (e.g., participating in Outreach events). These offices are also less able to absorb unanticipated absences and time spent performing non-casework duties.
- (3) To address the unique challenges of a smaller office, they are allowed a modification to the intake time adjustment.
- (4) This modification is equal to the greater of the current intake time adjustment or 20 percent for each on-role CA/BCA, up to a maximum of one.

Note: The 20 percent reduction is based on average indirect time.

Example: Office A has a LTA and three CAs. Their computed intake time adjustment is .50. Since this office meets the small office definition, their intake time adjustment is .60, the greater of the computed adjustment of .50 or 3 (the number of CAs) multiplied by 20 percent.

This Page Intentionally Left Blank

Exhibit 13.1.22-1 (01-19-2016)

TAMIS Employee Screen

1. Employee Screen

2. Street Address box

3. 1st field of Zip Code

4. 2nd field of the Zip Code – Always enter 0000.

5. 3rd field of the Zip Code – Enter one of the following:

- 250
- 500
- 750
- Otherwise, null.

