



DEPARTMENT OF THE TREASURY
INTERNAL REVENUE SERVICE
WASHINGTON, DC 20224

SMALL BUSINESS / SELF-EMPLOYED DIVISION

September XX, 2014

MEMORANDUM FOR Director, Campus Compliance Operations- Brookhaven
Director, Collection Area Operations- Central

FROM: Rocco A. Steco,
Acting Director, Collection Policy

SUBJECT: Test-Use of Digital Date Stamp on ASFR/SFR Reconsideration Documents
Sent via E-fax

This memorandum issues guidance for testing the use of E-fax when affixing a digital date stamp as the "official" IRS received date stamp to a tax return or document. The purpose of the test is to identify any unforeseen problems using this process and measure the effectiveness of the proposed changes.

The current process when documents are received via E-fax causes the revenue officer to print the documents in order to affix the date stamp and then scan the documents back into email to forward to ASFR in Brookhaven Service Center for processing.

The three Field Collection groups that will be participating in the test are located in Chattanooga, TN and Nashville, TN. The campus ASFR Unit that will be participating is located in Brookhaven Service Center. The pilot will run from September 30, 2014 through December 31, 2014.

The goals of this pilot are to:

1. Perfect use of E-fax for transmitting ASFR reconsideration tax returns with a digital date stamp
2. Reduce the number of rejected tax returns with no IRS received date, and
3. Reduce the burden of printing documents and then scanning for processing.

Overview of Pilot Procedures

There will be a short training session for both Field Collection (FC) and BSC participants. Training will be one hour or less for each group of employees and will be

held using either Office Communicator or Live meeting. After the training, FC will begin using this tool for processing their documents requiring a date stamp for adjustment.

Training will consist of setting up the digital date stamp for each FC employee. See Attachment 1. A sample date stamp and short video of how to place the date stamp on the return is also attached. See attachments 2 and 3.

Training for BSC employees will include information about the official "IRS" date stamp and verification of a complete and legible date stamp on the document sent for processing. In addition, training will include how to contact the field employees if a date is not legible due to the scanning process and how to track any errors.

A 48-hour turn around time from FC to the BSC will be provided prior to rejection of the reconsideration adjustment requested.

Upon completion of the pilot, an analysis will be completed. If successful, this process will then be implemented nationwide.

Please distribute this information to all participants in this pilot program. If you have any questions, please contact Sandra J O'Shea, Program Analyst.

Attachments:

Attachment 1 Simplified Instruction

Attachment 2 Sample Date Stamps

Attachment 3 Sample of Date Stamp

Video