

The below are notes uploaded to suggestion 50-21-18-053.

Private: (Note entered by Coordinator/Evaluator.)

Note by: [REDACTED]

Created: 10/26/2020 12:10:01 PM

Message received from Exam Southwest Area on 10/26/2020

Hello [REDACTED],

We would not be adopting this.

Thanks,

[REDACTED]

Exam SWA

Private: (Note entered by Coordinator/Evaluator.)

Note by: [REDACTED]

Created: 10/26/2020 10:37:29 AM

From: [REDACTED]

Sent: Monday, October 19, 2020 8:27 AM

To: [REDACTED]

Subject: RE: Input for suggestion 50-21-18-053 RESPOND by 10/23/2020

Hi [REDACTED], an electronic date stamp is not a new idea. We are already using it in South Atlantic Area. Thanks.

What do they use it for? If it is mine, it was only approved for SFR reconsiderations. Did it come through the suggestion program?

Private: (Note entered by Coordinator/Evaluator.)

Note by: Joe Ann McQuaige

Created: 10/26/2020 9:39:09 AM

Message received from Collection North Atlantic 10/26/2020

I don't see a problem with allowing anyone within the Service to utilize this method of stamping returns digitally. It sounds cost effective and productivity would increase with this method being less timing consuming to process a return especially during times like COVID where many are working remotely, and most communications are conducted via email.

Private: (Note entered by Coordinator/Evaluator.)

Note by: Joe Ann McQuaige

Created: 10/26/2020 9:22:32 AM

Message from Collection Central on 10/26/2020

In our current climate and with Telework which has and will continue to increase this is a good option as mail is one of the biggest issues that we are dealing with during the conditions under this pandemic. If RO's have the ability to use an electronic date stamp this would limit time in the office as well as open the door for mail to easily be processed from a drop location without having to go into an office, some items will need to continue to be handled in the office but an electronic date stamp would go a long way in helping Telework employees and well as Hotelers who do not have a designated office/desk assignment. I think the benefits will outweigh any cost incurred and will save cost in office travel in the future.

This may be from Cathy Stose. She is an analyst in Case Resolution Alternatives, in HQ Collection Policy. She contacted me and we emailed & "Skyped" about the possibility of using it to minimize disruptions due to COVID the month prior to this post.

My last contact with her, she said: "I did find out that your suggestion was recommended to be adopted—it is currently assigned to an analyst in IT- I reached out to him for a current status, but he did not respond. My program manager is now reaching out to his program manager for a current status."

Private: (Note entered by Coordinator/Evaluator.)
Note by: [REDACTED]
Created: 10/16/2020 1:53:17 PM

Message received from Exam Central area on 10/16/2020

[REDACTED]

What is in the pipeline? Where did it come from?

I believe this suggestion is already in the pipeline for Exam to use. I did a quick search and found the below update. It says other BODs are using it too. I think it is already being considered. It would make sense for Exam to follow suit, especially since other BODs are already utilizing it.

Only approved for "SFR Reconsiderations", hence this suggestion to expand the scope, which it appears everyone has already done.

Question: Electronic Stamp - Can the process be revisited?

Answer: Several in Field Collection (and in other Business Units) have been successfully using a Digital Date Stamp solution in the Adobe Acrobat software for the past several years to add the received date stamp to documents received over e-fax. There is no prohibition on using this option and the process is legitimate and authorized based on the Adobe software licenses secured by the Service.

Contributed by [REDACTED]

Last updated: Thursday, May 21, 2020

[REDACTED]

SBSE Exam - Central Area

CLOSE

Private: (Note entered by Coordinator/Evaluator.)
Note by: [REDACTED]
Created: 10/16/2020 1:46:26 PM

Message received from Southwest Collection area on 10/16/2020

Hi [REDACTED]

This looks as though it would improve efficiency and reduce costs, especially with so many of our ROs teleworking. It wouldn't require the adoption of any additional software, so no additional cost.

[REDACTED]

Southwest Area [REDACTED]

Private: (Note entered by Coordinator/Evaluator.)
Note by: [REDACTED]
Created: 9/17/2020 12:52:36 PM

Received message from field Collection 9/17/2020

Good morning [REDACTED],

I reviewed the suggestion, and below is the input from Gulf States Area:

Rosa Rivera, Secretary, Office Automation,
SBSE Deputy Commissioner, Exam.

That stamp does not meet the requirements of IRM

The Adobe Acrobat 2017 program currently has a dynamic stamp built in that allows a user to stamp a PDF document that shows it was received, by whom, the date, and time. This tool is currently an option used by RAs in GSA to date stamp documents without printing them. I am also including the FAQ from SB/SE stating it has been used for the past several years.

Question: Electronic Stamp - Can the process be revisited?

Answer: Several in Field Collection (and in other Business Units) have been successfully using a Digital Date Stamp solution in the Adobe Acrobat software for the past several years to add the received date stamp to documents received over e-fax. There is no prohibition on using this option and the process is legitimate and authorized based on the Adobe software licenses secured by the Service.

Contributed by [REDACTED]

Last updated: Thursday, May 21, 2020

<http://mysbse.web.irs.gov/collection/covid19/caseresolutionfaqs/39689.aspx>

Thanks,

[REDACTED], Gulf States Area

CLOSE

Private: (Note entered by Coordinator/Evaluator.)

Note by: [REDACTED]

Created: 7/16/2020 7:30:53 AM

Message from TE/GE may be a duplicate

From: Carroll Karen B

Sent: Thursday, July 9, 2020 10:40 AM

To: [REDACTED]

Subject: RE: Input on Suggestion 50-21-18-053 - RESPOND by 6/29/2020

Good Morning [REDACTED]

I'm still waiting for a few more comments. Here are the couple of comments I've received, which I'll share now:

- [REDACTED] no comments from EO Exam."

- [REDACTED]
EO R&A does not have any processes that would require/benefit from this tool."

CLOSE

Private: (Note entered by Coordinator/Evaluator.)

Note by: [REDACTED]

Created: 7/16/2020 7:29:16 AM

Message received from TG/GE, it may be a duplicate

HI [REDACTED]

Here is another comment from TEGE.

"Hi [REDACTED]

We did have some interest in the field but management suggested this suggestion be directed towards BSP to determine if there is a setting that allows a date stamp on the e-fax."

(Note: [REDACTED], BSP is the TEGE Business Systems Planning office, which is our Automation Support function.) You may already know that there is a setting which would allow a "date stamp" on e-fax. **Does not meet IRM requirements**

CLOSE

Private: (Note entered by Coordinator/Evaluator.)

Note by: [REDACTED]

Created: 7/16/2020 7:27:22 AM

Message from TE/GE 7/15/2020

Good Morning [REDACTED]

Here are more comments from TEGE. I'm waiting for one more response.

1. These are comments from our TEGE Exempt Organizations/Government Entities (EO/GE) Examination function:

"Hi [REDACTED]

I just got back to the office this morning.

Here is a summary of the responses I received from the EO Exam senior managers:

- While I'm not familiar with this tool, it does sound like it would promote all electronic case files and eliminating unnecessary printing.
- I like it! The future is an electronic environment so the earlier we begin to transition the better.
- When I was in manager in EP Exam, our group the pdf tool to electronically stamp the information that was received. Not all information had to be electronically date stamped, but the ones that did we used that pdf tool. This was helpful to stamp documents when the RAs were in the field and received items through e-fax to their email.
- I am not familiar with the Electronic Date Stamp, but it sounds like it would be beneficial to EOE as we have increased the use of electronically receiving information.

I sounds like some of our folks already use this in TEGE, but it could be used more widespread especially now with the amount of telework that is being done."

2. These are comments from our TEGE Employee Plans Examination (EPE) function:

"Hi [REDACTED], I am sorry, I thought this response was sent but I was having problems with Outlook last week where it kept shutting down. I found this in my drafts.

EPE believes this would be a good tool for TE/GE to use. However, we think not only the secretaries would find this useful, but also the agents. Given the current environment, the agents are doing this type of work themselves. Also for those agents that don't have secretaries co-located with them, this would be useful."

CLOSE

Private: (Note entered by Coordinator/Evaluator.)

Note by: [REDACTED]

Created: 7/16/2020 7:26:03 AM

Message received from TE/GE 7/15/2020:

Good Morning [REDACTED]:

Here is my last response from a [REDACTED] who always calls me by my last name.

😊 [REDACTED] not the only one, when you have two first names. 😊

[REDACTED]

We don't use stamps. Our agents type the dates on their letters."

CLOSE

Private: (Note entered by Coordinator/Evaluator.)

Note by: [REDACTED]

Created: 7/9/2020 3:31:15 PM

Again, this was only approved for "SFR Reconsiderations", hence this suggestion to expand the scope, which it appears everyone has already done.

Message received from LB&I 7/9/2020

[REDACTED], from a policy perspective and from a technical perspective, there are no barriers to the application of a digital date stamp being applied to eFax in LB&I. In fact, it appears that it has already been applied based on the following:

Question: Electronic Stamp - Can the process be revisited?

Answer: Several in Field Collection (and in other Business Units) have been successfully using a Digital Date Stamp solution in the Adobe Acrobat software for the past several years to add the received date stamp to documents received over e-fax. There is no prohibition on using this option and the process is legitimate and authorized based on the Adobe software licenses secured by the Service.

CLOSE

Private: (Note entered by Coordinator/Evaluator.)

Note by: [REDACTED]

Created: 7/9/2020 10:46:46 AM

Message received from TE/GE on 7/9/2020

Good Morning [REDACTED]:

I'm still waiting for a few more comments. Here are the couple of comments I've received, which I'll share now:

- [REDACTED] no comments from EO Exam."

- [REDACTED]
EO R&A does not have any processes that would require/benefit from this tool."

CLOSE

Private: (Note entered by Coordinator/Evaluator.)

Note by: [REDACTED]

Created: 6/26/2020 1:56:29 PM

Message from Counsel on 6/26/2020

This person appears to be talking about when they did my original date stamp.

Implementation of an electronic date stamp to replace a particular external stamp requirement in our litigation function would require GLS/P&A to perform comprehensive review on whether an electronic date stamp would be adequate and meet the statutory requirements of a particular document or process. SFRs went through this analysis and IRS determined it had authority to replace the traditional seal with an acceptable electronic software. Most of Counsel's internal documents do not have this stamp requirement if they are accepted electronically (B/C of pandemic OPM is reviewing all of the pen & ink requirements for personal actions as we speak but Counsel cannot make changes until authorized by OPM).

CLOSE

Private: (Note entered by Coordinator/Evaluator.)

Note by: [REDACTED]

Created: 6/26/2020 9:46:45 AM

Message from W&I for input on this suggestion 6/24/2020

RCPM/RCEO is already re-routing eFaxes from local printers to shared folders to research and upload the eFax documents into RGS. There is no requirement for these to be physically printed and stamped prior to processing. eFax documents are 'date stamped' as they are received and generate a cover sheet with that date on it. This is used to update the document in our inventory. This suggestion is already in place.

Details of suggestion Number 50-21-18-053 (1206 days old)

PRINT

CLOSE WINDOW

Click here to view the "I Suggest" form and the "Costing Wizard" ->

SUGGEST FORM

Title:	Electronic Date Stamp scope of use
Procedure:	While the advent of e-fax has significantly streamlined processes & reduced costs, there are some aspects of it that are hindered by regulations that do not take the new technology into account.

One of these is the date stamp. Thousands of documents are e-faxed each day. Many of those require an official date stamp to be affixed to the document. This requires the employee to print the document & then stamp it with the rubber stamp in the office. The printing of the document itself negates most of the benefit for e-fax. Then, if the employee is teleworking, they need to put the documents aside until they are in the office again to stamp it. This also affects timeliness.

There is an electronic date stamp that has been approved for use by Revenue Officers in processing SFR's & Reconsiderations. The software has a much broader application than that and to limit the scope of it's use to just SFR's & reconsiderations is inefficient.

I propose the use of the electronic date stamp for any document and/or employee that requires an official date stamp.

If the document can be sent electronically either through eFax or email, the employee can stamp the document & send it immediately.

If the document needs to be mailed through the postal service, the employee could stamp it from their telework location and mail immediately without having to wait until they get to the office again.

This will greatly increase productivity, efficiency, quality and reduce costs. All the necessary components of an official IRS received date are on the digital date stamp.

This suggestion, if adopted, would have tangible benefits in equipment, supplies, postage & shipping and salary & benefits.

It would also have intangible benefits in accuracy, business results, customer & employee satisfaction and in job effectiveness.

The original suggestion, while limited in application/scope, was estimated to have a first year tangible savings of \$23,295 and intangible benefits of \$3,000. That was based on usage by only Revenues Officers and only for SFR's & reconsiderations. The implication is that with the application & scope of use unhindered, the service would see exponentially greater benefit.

Submitter: Collins,David (david.collins@irs.gov)

Status: Paid

Details of suggestion Number 50-20-13-006 (3249 days old)

PRINT

CLOSE WINDOW

Click here to view the "I Suggest" form and the "Costing Wizard" ->

I SUGGEST FORM

Title: Digital date stamp of returns

Procedure:	<p>Currently when we receive a faxed return for reconsideration we date stamp it & then scan it to email with the 3870 to ASFR Recon for processing.</p> <p>With E-Fax, having to print the return so that we can date stamp it then scan it back in to email seems to defeat it's purpose. I think it would be better to sign the return digitally or use a digital stamp in Adobe and simply attach it to the email.</p> <p>The IRM seems to support this in some places and not in others. 5.1.15.4.4.1 (10-09-2012) "Accepting a Return for Reconsideration Processing" has only the option of date stamping the return with an official stamp. "Date-stamp the return with the date received using the official IRS date stamp."</p> <p>Support for digital signatures/stamps are found in: 5.1.2.2.3 (01-24-2012) "Official Received Date Stamp" "Handwritten (legible) recordatio of the received date information is acceptable as lng as it contains all of the elements listed above." 5.1.11.5 (01-15-2010) "Secured Returns" "If an official 'received' date stamp is not available, then write the following on the face of the tax return in the upper margin on the left side: 'Received', the date received, your signature & title."</p> <p>Submitter: Collins,David (david.collins@irs.gov)</p>
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