



## ***Post Submission Closure Procedure***

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*The goal of this process is to ensure uniformity across all partners on how cases should be closed as a Post Submission Closure*

### Initial steps:

1. Case must have been submitted to the IRS for a potential resolution but came back with additional items needed to complete the resolution or alternative proposed amount.
2. Communication regarding additional information and the deadline set by the IRS must be conveyed to the Client.
3. Case must be at least 80% paid.
4. Case must be with Servicing for at least 120 days.
5. All other services must be completed including tax preparation either completed or SFR'd if possible.
6. All documents saved to the Client's appropriate folder in the R:Drive.

### No decision, then:

7. Send Client "Post Submission All Options ACS" and phone call with an opportunity to respond
  - Letter includes all options and documents necessary to complete case with new set 14-day Deadline
8. Post 14-day Deadline, if there is no response, email your.case inbox to close the case as an \*\*\*Post-Submission All Options\*\*\* closure

### Additional considerations

- Be respectful – if the client is responsive and working with us, do not use this procedure as it may cause a Client Care issue or a refund.
- If all other services cannot be completed, utilize the cancellation procedure.
- If the client responds to the 14-day letter, set hard deadlines for all required information.