**Webinar – Network Update**

Most of you know that our Network Administrator – Shannon Reed – left the company a few weeks back. We are looking to fill that position in the very near term.

We have a new report that notifies you whenever we receive IRS Correspondence for one of your clients. At some point in the next couple of months we will also be able to save a copy of the actual notice to the Client file, as soon as IT can finish the programming necessary to make that happen. Many client files have sub-folders that we created so that you can organize and save case documents. Please do not change the folder names. Doing so will result in subverting the programs we are putting in place to automatically save transcripts and IRS Correspondence to the client files.

We are seeing a growing need for Affiliate Partners in certain locations so we are bringing on Affiliate Partners in particular geographic areas where we have little to no geographic coverage.

On the reporting side, keep in mind that when we contact you to discuss client contact notes it is because you are showing up on one of our reports. The purpose of the report and our contact with you about the report is to **prevent** client care issues that can result from a lack of client contact. If you are contacted we ask that you simply move quickly to ensure that appropriate client contact is taking place, and that you are keeping notes about your client contact up to date in DICE.

Good notes are essential – if a client calls into TDN in distress the notes are the first place that Client Care and the Affiliate Partner Team will look in an effort to gain insight in the case, and the client’s complaint.

At this point, we do need to free some capacity for additional cases in the Affiliate Partner Program. As we all know, September leading into the October filing extension deadline tends to be a very busy time for new cases. We will be sending out Inventory Reports on a weekly basis that are designed to point you in the correct direction about cases that could close in the very near term. If you have a question about how to proceed with a case so that it can be closed then please contact us so that we can work with you to move the case to closure. Cases that are 60% or more paid to TDN should be in the final stages of closing. Cases that are 100% paid to TDN should either be closed, or if the client is unresponsive get them through the cancellation process as discussed in last week’s webinar.

This brings up the subject of Closing Letters to clients. Template Closing Letters are available in DICE, and also in the Affiliate Partner Packet. The Closing Letter should address the final disposition of each service listed on the Service Agreement. You must provide TDN with a copy of the Closing Letter that you send to the Client by either copying the letter to the notes in DICE, or by saving a copy in the Client Folder.

You may see cases initially assigned that are 0% paid, and then within just a couple of days they show up with a very high (100% paid) percentage paid to TDN. These will typically be RUSH cases because there is a wage or bank levy in place. This can affect when the initial payment on the case is invoiced depending on the timing of case assignment versus the Affiliate Partner payment cycle. The advantage to these cases is that you should be able to close them very quickly.

For cases that are assigned at 100% paid to TDN, please refrain from pursuing Cancellation of the client for being unresponsive for six months from the date of initial assignment. Give the client the benefit of the doubt, and pursue the client with consistent contact until they respond, or until they have reached six months.

In the near future you may also see cases that do not have a Case Review call to the client.  If the case is very straight forward, we pull PPL and the services offered appear to match what we see happening at the IRS, then Case Review will forward the case for assignment without contacting the client.  While we haven’t seen any issues thus far, there might be a rare case that you may need to reset expectations with the client and possibly submit a re-contracting request to add or remove certain services. If you have any concerns or questions about the client’s expectations please contact us so that we can work with you to re-align client expectations.

A **PHONE CALL** must be placed to the client within 24/48 hrs of the case being assigned. NWP are not to just send a welcome email. The client has already received this from TDN.

Please – Please – Please --- Reset CAF if client transcripts are not downloading or updating.