



Deputy National Taxpayer Advocate

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Expires: June 31, 2008  
Impacted IRMs: 13.1.10  
and 13.1.18

## MEMORANDUM FOR TAXPAYER ADVOCATE SERVICE EMPLOYEES

FROM: Melissa R. Snell /s/ *Melissa R. Snell* 12/06/07  
Deputy National Taxpayer Advocate

SUBJECT: Guidance for Documenting the Authentication of the  
Taxpayer's Identity by way of Radio Button vs. TAMIS  
History

The purpose of this memo is to issue interim guidance to clarify how to document the authentication of a taxpayer's identity in TAMIS. See IRM 13.1.18.3(7). Please ensure that this information is distributed to all affected employees within your organization.

Case Advocates may use the TAMIS Radio Button checkbox "Made Positive Identification of TP", which is located on the "Initial Action Screen" when:

- the contact is an initial contact;
- the contact is conducted verbally, and
- the case involves a single taxpayer.

If more than one Case Advocate takes an action on a case, then the taxpayer authentication must be recorded in the TAMIS history. For example, if a case is reassigned to another Case Advocate, or if a manager contacts the taxpayer, each TAS employee must record the authentication of the taxpayer's identity in the TAMIS history.

Similarly, if the TAS case involves more than one taxpayer, the Case Advocate must document the authentication of the taxpayer's identity in the TAMIS history. For example, if a case involves spouses who filed a joint return, the Case Advocate should not use the radio button because there is no way to indicate which taxpayer is being authenticated.

If the Case Advocate's initial contact with the taxpayer is by correspondence, the Case Advocate will not use the radio button. If verbal contact is later made, the contact(s) must be documented in the TAMIS history and also specify which taxpayer's identity was authenticated (i.e., Mrs. Taxpayer, Corporate President, etc.).

It is acceptable to use the approved acronyms "DV" or "PFANBATGA" in the TAMIS history to indicate that the authentication was completed. The last "A" in the "PFANBATGA" acronym stands for authentication.

**Effect on Other Documents:** This guidance will be incorporated into IRM 13.1.10 and IRM 13.1.18 by June 30, 2008.