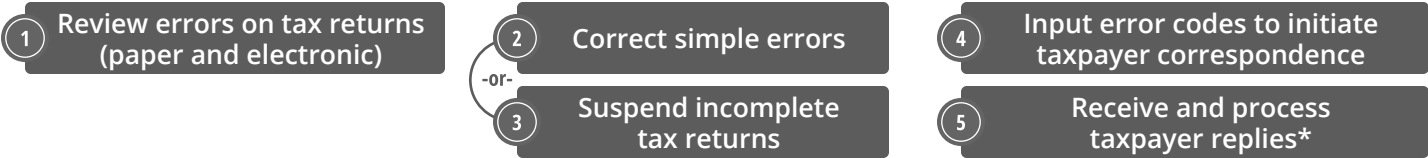




# Tax Examiner – Error Resolution

## KEY TASKS



## SUMMARY

The Tax Examiner (TE) represents IRS employees working to review and correct errors on tax returns that have “fallen out” to the Error Resolution department. These individuals are trained to utilize internal systems (e.g., IDRS) to research taxpayer accounts, input command codes, initiate correspondence with taxpayers and make adjustments upon receipt of supporting documentation. This ensures processing continues so taxpayers may receive refunds or determine their balance due.

## QUOTE

“One of my biggest things is [to] always remember what your job is. You’re not just pushing paper; you’re here for the taxpayer. If [we don’t find their] mistakes, and they have made one and they’re not aware of it, then we are harming them.”

-Supervisor, ERS

## MOTIVATIONS

- Following IRM instruction
- Meeting daily processing quotas
- Processing returns quickly to help taxpayers
- Getting promoted/professional growth

## CONCERNS

- Keeping up with tax form changes each year
- Missing errors that result with inaccurate balance due
- Handling incomplete taxpayer replies (12C letters)\*
- Working through inventory/backlog
- Working with outdated technology systems

## LINKED BEHAVIORS

- |       |  |
|-------|--|
| 4     | » Issuing TPNs and 12C letters to taxpayers  |
| 2 3 4 | » Utilizing resources (e.g., IRM, IAT, IDRS, job aides) to identify/resolve errors |
|       | » Communicating with team members, leads and managers                              |
| 5     | » Interpreting taxpayer intention  |
| 2     | » Checking for transcription errors/ misplaced entries (paper only)                |
| 3     | » Transferring returns to other departments  |
| 3     | » Addressing incoming 4442s*   |

\*Actions taken by Rejects team



reviews physical documents