

**Telephone Numbers and Addresses for Local
Internal Revenue Service Offices Have Not
Been Published in Telephone Books**

May 2002

Reference Number: 2002-40-087

This report has cleared the Treasury Inspector General for Tax Administration disclosure review process and information determined to be restricted from public release has been redacted from this document.



DEPARTMENT OF THE TREASURY
WASHINGTON, D.C. 20220

INSPECTOR GENERAL
for TAX
ADMINISTRATION

May 3, 2002

MEMORANDUM FOR COMMISSIONER, WAGE AND INVESTMENT DIVISION

Pamela J. Gardiner

FROM: Pamela J. Gardiner
Deputy Inspector General for Audit

SUBJECT: Final Audit Report - Telephone Numbers and Addresses for
Local Internal Revenue Service Offices Have Not Been
Published in Telephone Books (Audit # 200240003)

This report presents the results of our review to determine if the Internal Revenue Service (IRS) had accurately published the telephone numbers and addresses of local IRS offices in local telephone books. The IRS Restructuring and Reform Act of 1998¹ Section 3709 required the IRS to publish the telephone numbers and addresses of local IRS offices in local telephone books as soon as practicable to make it easier for taxpayers and their advisors to seek local IRS assistance.

To date, the IRS has made significant progress, including the selection of 402 local IRS sites nationwide and obtaining telephone numbers for these sites. However, the majority of the telephone numbers and addresses for these 402 sites have not been published in local telephone books. The IRS was unable to provide the exact number of telephone numbers published to date and has no system to monitor the publishing progress. In addition, alternatives for taxpayers to obtain local IRS telephone numbers and addresses (publishing can take up to 2 years) have not been used or are not always accurate.

Management's Response: IRS management agreed with our recommendations and have already completed corrective actions to Recommendations 1 and 2. For Recommendation 3, the IRS is preparing a spreadsheet to track and monitor the publishing of local telephone numbers. Management's complete response to the Draft Report is included as Appendix V. Management's response included several

¹ Pub. L. No. 105-206, 112 Stat. 685 (1998).

attachments detailing various aspects of the corrective action. The attachments were too large to include in this report, but are available for review upon request.

Copies of this report are also being sent to the IRS managers who are affected by the report recommendations. Please contact me at (202) 622-6510 if you have questions or Michael R. Phillips, Assistant Inspector General for Audit (Wage and Investment Income Programs), at (202) 927-0597.

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Background

On July 22, 1998, President Clinton signed into law the Internal Revenue Service (IRS) Restructuring and Reform Act of 1998 (RRA 98).¹ Section 3709 of the RRA 98 required the IRS to publish the telephone numbers and addresses of its local offices in local area telephone books as soon as practicable. The intent of Section 3709 was to make it easier for taxpayers and their advisors to seek local IRS assistance.

Assistance provided at local IRS offices is the primary means by which taxpayers receive face-to-face assistance from the IRS. Taxpayers may seek local assistance for various reasons, including:

1. Preparation of a tax return and/or obtaining tax forms.
2. Determination of eligibility for a specific tax credit (e.g., Earned Income Tax Credit, Child Care Credit, Education Credit).
3. Clarification regarding the tax implications of a specific transaction (e.g., sale of a home, Individual Retirement Account distribution, charitable contributions).
4. Clarification of an IRS notice the taxpayer has received.

In Fiscal Year (FY) 2001, over 9 million taxpayers received assistance from local IRS offices.

Since the passage of the RRA 98, the Congress has had a continual interest regarding the status of the IRS' implementation of Section 3709, with members of the Congress writing letters to the IRS Commissioner.² In addition, meetings between the IRS and the Senate Finance Committee, subsequent to the passage of the RRA 98, have resulted in approval for the IRS to use a pre-recorded message in lieu of an IRS employee to answer calls. This pre-recorded message would provide taxpayers with the office location and hours of operation, information available

¹ Pub. L. No. 105-206, 112 Stat. 685 (1998).

² The IRS Commissioner received letters from Senator Bob Graham in January 2001 and Senators Charles Grassley and Max Baucus in February 2001.

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on the IRS' toll-free numbers, and the option for the taxpayer to leave a detailed message. IRS personnel would then retrieve the messages with a callback made to the taxpayer within two business days.

This audit was conducted at the IRS' Wage and Investment Division (W&I) and at the IRS' New Orleans field office from October 2001 to January 2002. The audit was conducted in accordance with *Government Auditing Standards*. Detailed information on our audit objective, scope, and methodology is presented in Appendix I. Major contributors to the report are listed in Appendix II.

The IRS has made significant progress in preparation for the publishing of local telephone numbers and addresses, including:

- Designating the location of IRS sites nationwide, to ensure all taxpayers have the ability to contact an IRS office within their area codes. This has resulted in the IRS identifying 402 sites³ nationwide.
- Obtaining telephone numbers for the 402 sites from local telephone companies.
- Obtaining and installing appropriate equipment to allow for the use of a pre-recorded message and the ability for taxpayers to leave a message.
- Ensuring the pre-recorded messages for the 402 sites are consistent and include the office address, hours of operation, information available on the IRS' toll-free assistance numbers, and the option for taxpayers to leave a message.

However, to date:

- The majority of local telephone numbers and addresses have not been published in local telephone books.

³ The 402 sites identified by the IRS do not include all of its 431 walk-in tax assistance centers. If there were multiple local IRS offices in a metropolitan area, only one site was identified to have the local telephone number and address published.

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- Alternatives for taxpayers to obtain local IRS telephone numbers and addresses (until telephone numbers are published)⁴ have not been used and/or are not always accurate.

The lack of telephone numbers and addresses for these local IRS offices could cause added burden for taxpayers seeking personal assistance. Some of the local IRS offices are open only on certain days and/or with limited hours, making the availability of local telephone numbers crucial to the taxpayer.

The majority of local telephone numbers and addresses have not been published in local telephone books

Our review of 51 local IRS sites⁵ found that none of these 51 sites had a local telephone number published in the local telephone book. In addition, 28 did not have a local address published. For the 23 sites that did have an address published, it was provided in conjunction with the IRS' toll-free numbers. (See Appendix IV for a complete listing of the 51 sites sampled)

Furthermore, the IRS could not provide the exact number of sites for which a telephone number and address has been published to date. The IRS does not know the various print schedules and does not have a system to monitor the printing. Therefore, the IRS cannot determine how many of the local telephone numbers and addresses have actually been printed in local telephone books. According to the IRS, in order to determine the number of telephone numbers actually published, it would have to have someone look in the 402 telephone books. Therefore, the IRS cannot determine how close it is to full implementation of Section 3709.

⁴ Publication of telephone numbers can take up to 2 years.

⁵ We selected a sample of 51 local IRS offices, 1 from each state plus the District of Columbia, by sorting all the local offices alphabetically by state and then selecting the first one for each state.

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Alternatives for taxpayers to obtain local IRS telephone numbers and addresses have not been used and/or are not always accurate

Publishing of local telephone numbers and addresses can take up to 2 years, due to different printing schedules by the individual telephone companies. Therefore, we tested alternatives to see if taxpayers could obtain the telephone numbers and addresses of the local IRS offices from alternative sources, including:

- IRS' Toll-Free Customer Service.
- IRS' website, *The Digital Daily*.
- Directory Assistance.

Our review of the above alternatives found that the information was not available or was not always accurate. Specifically:

IRS' Toll-Free Customer Service – We did not obtain the correct local telephone number for any of the 51 local IRS sites tested. We were given only one local telephone number, which was to a fax machine. We did obtain the correct address for all but one of the local IRS sites.

IRS' website, *The Digital Daily* – There were no local telephone numbers or addresses for the 51 local IRS sites sampled using the “Contact Us” icon on *The Digital Daily* (www.irs.gov/where_file/index.html). All but five of the “Contact Us” sites for the individual states had a link to “Around the Nation” for that state with more information on the services available in that state. The “Around the Nation” websites had local addresses for 34 of the 46 (74 percent) states with links, but only 2 had local telephone numbers.

The IRS, based on discussions with our office, has since taken corrective action by adding the local telephone numbers and addresses to the IRS' website, *The Digital Daily*.

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Directory Assistance – We obtained the correct local IRS telephone number for only 4 (8 percent)⁶ of the 51 test calls made to Directory Assistance.

- For 32 (63 percent) of the 51 test calls, the Directory Assistance operator referred us to one of the IRS' toll-free numbers, such as:
 - 1-800-829-1040 for assistance from an assistor.
 - 1-800-829-3676 for tax forms.
 - 1-800-829-4477 for refund information.
- For 12 (24 percent) of the 51 test calls, we received inaccurate numbers, such as the number for a fax machine, the Taxpayer Advocate, Criminal Investigation, or voice mail for unknown persons.
- For 3 (6 percent) of the 51 test calls, we received a number to a pre-recorded IRS message, but the message did not provide local office information.

Taxpayers should be cautioned in the use of Directory Assistance to obtain local IRS telephone numbers. Directory Assistance is dependent upon the information the telephone carrier that is called has available. There is no nationwide database with all new telephone numbers for all of the different Directory Assistances to search. Therefore, taxpayers are not always able to obtain the local IRS office telephone number from Directory Assistance.

Contributing Factors

There were several major factors that the IRS had to address before local IRS telephone numbers and addresses could be published, including:

- The RRA 98 contained approximately 75 provisions with due dates either on the date of enactment or retroactive to the enactment date. Many of these provisions took priority over others, such as

⁶ Due to rounding, percentages do not add up to 100 percent.

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Section 3709, with implementation dates that were not clearly defined.

- Responsibility within the IRS for the implementation of Section 3709 was transferred multiple times due to the restructuring of the IRS. Originally, the implementation of Section 3709 was assigned to the IRS' Customer Service Field Operations in the Chief Operations Office, but during the restructuring of the IRS, the responsibility shifted to the IRS' Office of Tax Administration Coordination located in Washington, DC. The responsibility was finally assigned to the IRS' W&I Field Assistance in Atlanta, Georgia, in July 2001 and, since then, the majority of the progress towards implementation has been made.
- Telephone numbers could not be obtained from local telephone companies until local IRS sites were identified. These sites could not be identified until the reorganization of field offices was completed (movement of field offices between different business units).
- The IRS could not use existing telephone lines in many of the identified sites due to the assignment of these lines to current personnel. Therefore, the IRS was required to obtain new telephone numbers from local telephone companies in many of its sites.

In addition, the actual publishing and distribution of local telephone numbers is further hindered by the following factors:

- The IRS lacked a consistent method to publish all telephone numbers. The publishing of telephone numbers and addresses is dependent on whether there is a local General Services Administration (GSA) contract for the area. If there is not a contract, local carriers must be contracted with on an individual basis. Of the 402 local IRS sites, only

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159 are covered by GSA's "Blue Pages Project;"⁷ the other 243 must have contracts negotiated with the local telephone carriers. The IRS is in the process of negotiating these contracts. The telephone companies print their local directories on different schedules.

- W&I's marketing plans for the distribution of local IRS office telephone numbers and addresses did not include providing the use of alternative sources for immediate taxpayer access, such as *The Digital Daily* and the IRS' Toll-Free Customer Service.

Recommendations

The Commissioner, W&I Division, should:

1. Ensure local telephone numbers and addresses are provided to the IRS' Toll-Free Customer Service function and on the IRS' website, *The Digital Daily*, immediately. He should also inform the taxpaying public that this information is available.

Management's Response: The IRS posted local telephone numbers and addresses to its website on February 4, 2002, and made the numbers available to IRS employees via computer on February 11, 2002. The IRS is using various media and stakeholder outlets to make the public aware of the availability of this information.

2. Ensure contracts are obtained with local telephone carriers to have all telephone numbers and addresses published in local telephone books.

Management's Response: All orders for local telephone numbers were completed as of March 5, 2002.

3. Develop procedures to track and monitor the actual publishing of local IRS office telephone numbers in local telephone books.

⁷ GSA's "Blue Pages Project" compiles all the telephone numbers for federal government agencies to be placed in the blue pages of local telephone directories.

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Management's Response: The IRS is preparing a spreadsheet that it will use to track and monitor the publication of local telephone numbers. The spreadsheet will include vendor names, publication request date, and scheduled publication date. The IRS will use this spreadsheet to verify that the numbers were published.

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Appendix I

Detailed Objective, Scope, and Methodology

The overall objective of the audit was to determine if the Internal Revenue Service (IRS) had accurately published the telephone numbers and addresses of local IRS offices in local telephone books. To accomplish this objective, we:

- I. Determined if local IRS office telephone numbers and addresses were published in local telephone books.
 - A. Obtained and analyzed the Restructuring and Reform Act of 1998 (RRA 98)¹ Section 3709 to determine what actions the Congress required the IRS to take in relation to the publishing of local IRS office telephone numbers and addresses.
 - B. Reviewed applicable management files to obtain background information relating to actions taken in response to the RRA 98.
 - C. Obtained an official listing of the local IRS offices and addresses from the IRS for use in verifying the accuracy of telephone numbers and addresses resulting from later test objectives.
 - D. Selected a sample of the local IRS offices and researched the telephone books for those local areas to see if the telephone numbers and addresses were present.
 1. If local telephone numbers and addresses were published in local telephone books, ensured the accuracy of the published information by comparing the telephone numbers and addresses to the official IRS listing.
 2. If telephone numbers and addresses were not in local telephone books or were not accurate, interviewed management to determine why and attempted to quantify how many taxpayers could be impacted.
- II. When above testing identified that the local IRS telephone numbers and addresses were not published, determined if taxpayers could accurately obtain this information from other means including Directory Assistance, the IRS' Toll-Free Customer Service, and the IRS' public internet site (*The Digital Daily*).
 - A. Determined if the correct local office telephone numbers were available to taxpayers through Directory Assistance.
 1. Using the sample selected, called Directory Assistance to determine if a local IRS office telephone number was available.

¹ Pub. L. No. 105-206, 112 Stat. 685 (1998).

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2. If the local telephone number was available, determined if the number obtained from Directory Assistance was accurate by comparing it to the official IRS listing.
 3. If a local telephone number was not available from Directory Assistance or was not accurate, interviewed management to determine why and attempted to quantify the number of taxpayers that could be impacted.
- B. Determined if the IRS' Toll-Free Customer Service (1-800-829-1040) provided correct local IRS office telephone numbers and addresses to taxpayers.
1. Using the sample selected, called the 1-800 number and requested the local telephone number and address for each site.
 2. When the telephone number and address was obtained, ensured the information provided was accurate by comparing it to the official IRS listing.
 3. When the telephone number and address was not obtained or was not accurate, interviewed management to determine why.
- C. Determined if the IRS' public Internet site (*The Digital Daily*) provided correct local IRS office telephone numbers and addresses to taxpayers.
1. Using the sample selected, accessed the IRS' *Digital Daily* to determine if correct local office telephone numbers and addresses were available.
 2. If the telephone number and address was obtained, ensured the information provided was accurate by comparing it to the official IRS listing.
 3. If the telephone number and address was not obtained or was not accurate, interviewed management to determine why.

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Appendix II

Major Contributors to This Report

Michael R. Phillips, Acting Assistant Inspector General for Audit (Wage and Investment Income Programs)

Kerry Kilpatrick, Director

Russell Martin, Audit Manager

Edith Lemire, Senior Auditor

Roberta Fuller, Auditor

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Appendix III

Report Distribution List

Commissioner N:C
Director, Customer Assistance, Relationships, and Education W:CAR
Director, Field Assistance W:CAR:FA
Director, Strategy and Finance W:S
Chief Counsel CC
National Taxpayer Advocate TA
Director, Legislative Affairs CL:LA
Director, Office of Program Evaluation and Risk Analysis N:ADC:R:O
Office of Management Controls N:CFO:F:M

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Appendix IV

Availability of Local Addresses in Sampled Sites

Site Location		Address in Local Telephone Book	
State	City	Yes	No
AK	Anchorage	X	
AL	Birmingham		X
AR	Fayetteville		X
AZ	Bullhead City	X	
CA	Bakersfield		X
CO	Colorado Springs	X	
CT	Bridgeport	X	
DC	Washington	X	
DE	Dover		X
FL	Daytona Beach	X	
GA	Albany		X
HI	Hilo	X	
IA	Cedar Rapids		X
ID	Boise	X	
IL	Champaign		X
IN	Bloomington	X	
KS	Mission		X
KY	Ashland		X
LA	Alexandria	X	
MA	Boston	X	
MD	Annapolis		X
ME	Augusta	X	
MI	Detroit		X
MN	Bloomington	X	
MO	Cape Girardeau		X

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Site Location		Address in Local Telephone Book	
State	City	Yes	No
MS	Clarksdale		X
MT	Billings	X	
NC	Ashville	X	
ND	Bismark		X
NE	Norfolk		X
NH	Keene		X
NJ	Cherry Hill	X	
NM	Albuquerque		X
NV	Las Vegas	X	
NY	Albany		X
OH	Akron	X	
OK	Enid		X
OR	Bend		X
PA	Altoona		X
RI	Providence		X
SC	Charleston		X
SD	Aberdeen	X	
TN	Chattanooga		X
TX	Abilene		X
UT	Ogden	X	
VA	Bailey's Crossroads	X	
VT	Brattleboro		X
WA	Bellevue	X	
WI	Appleton		X
WV	Bridgeport	X	
WY	Casper		X

Source: Local Telephone Directories

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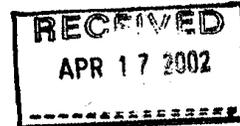
Appendix V

Management's Response to the Draft Report



DEPARTMENT OF THE TREASURY
INTERNAL REVENUE SERVICE
ATLANTA, GA 30308

April 16, 2002



MEMORANDUM FOR TREASURY INSPECTOR GENERAL FOR
TAX ADMINISTRATION

FROM: John M. Dalrymple 
Commissioner, Wage and Investment Division

SUBJECT: Draft Audit Report – Telephone Numbers and Addresses for
Local Internal Revenue Service Offices Have Not Been
Published in Telephone Books (Audit # 200240003)

Our preparation for publishing local IRS telephone numbers and addresses brings us closer to our goal of easing access for taxpayers and advisors. We have made significant progress in:

- Designating the location of the sites nationwide
- Securing the telephone numbers for the 402 sites
- Installing the appropriate equipment
- Using consistent pre-recorded messages for all 402 sites

Even though all the phone numbers and addresses are not yet published, the process is in place to eventually have this information available in local phone books. We are also developing a monitoring system to track publication and to verify all site numbers are published.

Section 3709 of the IRS Restructuring and Reform Act of 1998 (RRA 98) requires the IRS to publish telephone numbers and addresses of local offices in local telephone books. Discussions with Senate Finance Committee staff confirmed that it was not the intent of Congress for local phone numbers to replace existing IRS toll-free telephone services. As a result, local phone lines use pre-recorded messages in lieu of an IRS employee answering calls. The pre-recorded message provides taxpayers with office location and hours of operation, the types of information available on IRS' toll-free numbers, and the option for the taxpayer to leave a message to request a problem-solving appointment or other message. The IRS personnel retrieve the messages and call the taxpayer within two business days.

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For Recommendations 1 and 2, we have completed the corrective actions. For Recommendation 3, our planned corrective actions are detailed below.

RECOMMENDATION # 1

The Commissioner, Wage and Investment Division, should ensure local telephone numbers and addresses are provided to the IRS' Toll-Free Customer Service function and on the IRS' website, *The Digital Daily*, immediately. He should also inform the taxpaying public that this information is available.

ASSESSMENT OF CAUSE

The IRS lacked a consistent method to publish telephone numbers. Also contributing to the delays in publishing local numbers were several issues we had to address before local numbers could be published. For example, RRA 98 contained 75 provisions with effective dates on the date of enactment that required immediate attention. In addition, the agency was in the midst of one of the largest reorganizations in its history, one that affected the management, staffing, and services of many local IRS offices.

Implementation responsibility for Section 3709 transferred multiple times. Originally, responsibility was assigned to Customer Service Field Operations in the Chief Operations Office. During restructuring, responsibility shifted to the Office of Tax Administration Coordination. Finally, in July 2001, responsibility shifted to W&I Field Assistance at the Atlanta, Georgia Headquarters. Since then, most of the progress towards implementation has taken place.

The W&I Division marketing plans for distribution of local office telephone numbers and addresses did not include alternative sources, such as *The Digital Daily* and the IRS' Toll-Free Customer Service.

CORRECTIVE ACTIONS

We posted local telephone numbers and addresses to the IRS' website, *irs.gov* (formerly "*Digital Daily*"), on February 4, 2002. We also made the telephone numbers available to IRS employees on the Servicewide Electronic Research Program (SERP) on February 11, 2002.

We are using various channels including media interviews and public presentations to tell the taxpaying public the information is available on our website. We also are communicating this information to our key stakeholders.

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We developed a Fact Sheet (Attachment 1) for Field Media Relation's (part of W&I Communications and Liaison) use in media interviews. The fact sheet includes talking points about the availability of the local telephone numbers. We also distributed a talking points paper to IRS managers and employees (Attachment 2) for use when speaking at public presentations. This document mentions that the telephone numbers are available on our website.

We are informing our stakeholders as well, including an article in the April 2002 edition of *Congressional Update* (Attachment 3), about the availability of the telephone numbers on the IRS' website and included the local telephone numbers within each congressional representative's state.

We are alerting tax professionals to the availability of local office telephone numbers through print and electronic newsletters.

The W&I Communications & Liaison provided the Taxpayer Advocate Service with all communication products, which they will share with their external presenters. Communications & Liaison is also planning a public awareness campaign with a national news release in May 2002. Attachment 4 is a copy of their communication strategy for Section 3709.

IMPLEMENTATION DATE

All the above actions were completed as of the dates shown.

RESPONSIBLE OFFICIAL

Director, Field Assistance, W&I Customer Assistance, Relationships, and Education (CARE)

CORRECTIVE ACTIONS MONITORING PLAN

Not applicable

RECOMMENDATION # 2

The Commissioner, Wage and Investment Division, should ensure contracts are obtained with local telephone carriers to have all telephone numbers and addresses published in local telephone books.

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ASSESSMENT OF CAUSE

The General Services Administration (GSA) handles the publishing of telephone numbers and addresses in local phone books where contracts exist. If no contract existed, we contracted with each local carrier. Only 159 of 402 taxpayer assistance sites are covered by GSA's "Blue Pages Project."¹ For the remaining 243 sites, we are negotiating contracts. Within the IRS, Information Technology Systems (ITS) and the Blue Pages Project Team are responsible for publishing telephone numbers in local telephone books. The Blue Pages Project Team submits publication requests to the Department of the Treasury, which then makes the final request to GSA. In addition, the local directories are printed on varying schedules.

CORRECTIVE ACTIONS

We coordinated with ITS and the Blue Pages Project Team to assure we place orders for publishing all local IRS numbers. All orders for local telephone numbers were completed as of March 5, 2002. Attached is a spreadsheet (Attachment 5) that lists the telephone numbers that ITS or the Blue Pages Project Team have ordered.

IMPLEMENTATION DATE

Completed March 5, 2002

RESPONSIBLE OFFICIAL

Director, Field Assistance, W&I CARE

CORRECTIVE ACTION MONITORING PLAN

Not applicable

RECOMMENDATION # 3

The Commissioner, Wage and Investment Division, should develop procedures to track and monitor the actual publishing of local IRS office telephone numbers in local telephone books.

¹ GSA's "Blue Pages Project" compiles all the telephone numbers for federal government agencies to be placed in the blue pages of local telephone directories.

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ASSESSMENT OF CAUSE

We could not provide the exact number of sites for which a telephone number and address had been published to date. We did not know the print schedules for the various phone book publishers, and we did not have a system to monitor the printing. Therefore, we could not determine how many of the local telephone numbers and addresses had actually been printed in local telephone books.

CORRECTIVE ACTIONS

The ITS is preparing a spreadsheet, due to the Director, Field Assistance, on or before April 30, 2002. This document will contain vendor names, the date we made the request for publication, and the date the phone directory is scheduled for publication. The Director, Field Assistance, will use the spreadsheet to verify the numbers are published in the phone directory after publication.

IMPLEMENTATION DATE

Complete the verification of publication in local directories: September 30, 2003

RESPONSIBLE OFFICIAL

Director, Field Assistance, W&I CARE

CORRECTIVE ACTION MONITORING PLAN

Field Assistance Program Management will sort the spreadsheet by publication due dates and monitor publications on a monthly basis.

If you have any questions or need additional information regarding this response, please contact Jerald Heschel, Director, Field Assistance, W&I CARE at (404) 338-7107.

Attachments (5)