

# IRS Tax Forum Case Resolution Data Sheet

*For IRS Use Only*

**(Please complete all sections below)**

**Note:** When scheduling your appointment, you must bring a valid Power of Attorney (POA) for the client listed for all tax periods and forms for which you are requesting assistance. If a tax matter concerns a year in which a joint return was filed, the husband and wife must each file a separate power of attorney. The current revision of form 2848 is available at [irs.gov](http://irs.gov).

Only the practitioner listed will be allowed entry into the Case Resolution Program.

Appt. No.: \_\_\_\_\_

Day:       Tu       W       Th

Time: \_\_\_\_\_      Table # \_\_\_\_\_

Contact: \_\_\_\_\_

## Section 1

Taxpayer / Business name \_\_\_\_\_

Street address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP code \_\_\_\_\_

Tax period(s) \_\_\_\_\_

Tax form(s) \_\_\_\_\_

## Section 2

Authorized representative name \_\_\_\_\_

Street address or P.O. Box \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP code \_\_\_\_\_

Telephone number \_\_\_\_\_ Cellular number\* \_\_\_\_\_

*\*(Providing a cellular number will be helpful should we need to contact you after your appointment)*

Copy of POA Attached — CAF # \_\_\_\_\_

No POA on file; original attached

## Section 3

Description of problem/issue (*attach all pertinent information*)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Are you currently working on this case with an IRS representative     Yes     No

If **Yes**, please check which operation:     Collection     Exam     TAS     Appeals     Other

City/Office (*if known*) \_\_\_\_\_

---

## Instructions for Practitioner Case Resolution Program

---

Bring your toughest IRS case (*one case per practitioner*) to the Practitioner Case Resolution Program. IRS representatives with specialized experience will be available — *by appointment only* — to meet one-on-one with tax professionals to discuss a client's tax case. If the case can't be resolved on site, it will be assigned to an appropriate IRS professional for follow-up.

### Securing an Appointment

#### Securing an Appointment on Monday

Visit the Practitioner Case Resolution table in the general Forum Registration area from 2:00 p.m. – 7:00 p.m.

#### Securing an Appointment on Tuesday, Wednesday or Thursday

Go directly to the Practitioner Case Resolution Program. The Forum Information Desk can direct you to the room location.

### Additional Requirements for Securing an Appointment

- You **must** provide the **completed** Case Data Sheet on the reverse side of this form. This will save you time, minimize your wait in line and will assist us in scheduling your appointment.
- You **must** physically bring a signed copy of Form 2848, Power of Attorney and Declaration of Representative, even if it is already on file with the IRS. We cannot schedule an appointment without a physical copy. **NOTE:** The Form 2848 information you provide must cover all tax forms and tax years for which you are scheduling the appointment and you must be listed on the form. If a tax matter concerns a year in which a joint return was filed, the husband and wife must each file a separate power of attorney. The current revision of form 2848 is available at [irs.gov](http://irs.gov).
- Provide any additional IRS correspondence, notices and/or other documentation that will be helpful in resolving the case.
- Be aware that only the individual(s) listed on the POA will be allowed to enter the Case Resolution Program.
- Be aware that only 1 appointment for 1 case will be allowed per practitioner.
- The Case Resolution Program cannot help you with your personal tax issue. If you have an issue with your personal tax account, please contact the IRS or Taxpayer Advocate Service directly.

---

### PRIVACY ACT STATEMENT

---

The Privacy Act of 1974 requires that when we ask you for information about yourself, we state our legal right to do so, tell you why we are asking for it, and how it will be used. We must also tell you what could happen if we do not receive it, and whether your response is voluntary, required to obtain a benefit, or mandatory. Our legal right to ask for the information is pursuant to Public Law 92-463 and Executive Order (E.O.) 9397. We are asking for the information in order to facilitate efforts to provide outstanding tax practitioner case assistance and resolution.

Supplying the information is voluntary and not directly required by law. Requesting your social security number, which is solicited under authority of E.O. 9397, is also voluntary and no right, benefit, or privilege provided by law will be denied as a result of refusal to disclose it. However, not providing all or any part of the information may limit the expediency, accuracy or completion of assistance provided.