Request Updates to Customer Information

Process

REQUEST CUSTOMER INFORMATION UPDATES

Effective Date

08/16/2005

Purpose

The Request Updates to Customer Information task provides the information and instructions needed for the Locality Representative to notify TAX of changes needed to customer information.

Special Notes

- The Locality Representative must submit all changes to customer information to TAX.

Procedure

Responsibility
Locality Representative

Steps

1. Receive and review information provided by the customer indicating their information at TAX is incorrect.
2. Determine what customer information is incorrect and must be corrected.
3. Assemble the following information to provide to TAX:
   - Your locality's FIPS
   - The customer's External ID (SSN/FEIN)
   - The customer's Name and Address as currently known by TAX
   - The incorrect information with all the necessary corrections.
4. If notifying TAX by phone,
   A. Call TAX's locality hot line.
   B. Provide TAX with all information from Step 3.
   C. Go to Step 7.
5. If notifying TAX by Secure Message e-mail,
   A. Compose the e-mail to TAX providing all information from Step 3.
   B. Attach any soft copy (electronic) documentation to support the change to the e-mail.
   C. Send the e-mail to TAX.
   D. Go to Step 7.
6. If notifying TAX by fax,
   A. Prepare the information from Step 3 for faxing.
   B. Submit the fax.
7. Maintain all paper documentation in your office in the event needed by TAX or the customer.

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8. Inform the customer of your actions.
9. Provide any follow-up or additional customer contact as required by your locality.

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