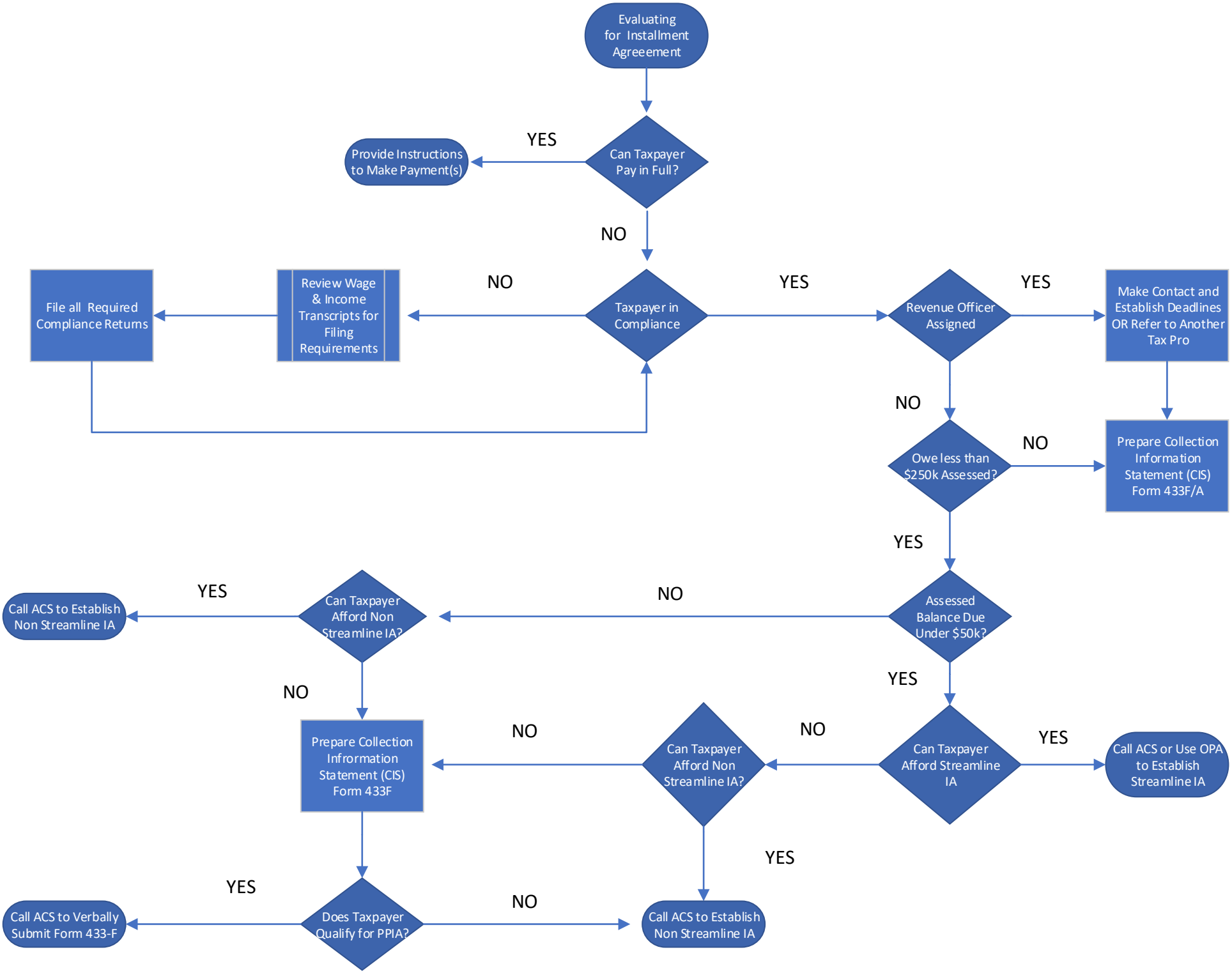
Evaluating for Installment Agreeement
Can Taxpayer Pay in Full?
YES
Provide Instructions to Make Payment(s)
NO
Taxpayer in Compliance
NO
Review Wage & Income Transcripts for Filing Requirements
File all Required Compliance Returns
YES
Revenue Officer Assigned
YES
Make Contact and Establish Deadlines OR Refer to Another Tax Pro
NO
Owe less than $250k Assessed?
NO
Prepare Collection Information Statement (CIS) Form 433F/A
YES
Assessed Balance Due Under $50k?
NO
Can Taxpayer Afford Non Streamline IA?
YES
Call ACS to Establish Non Streamline IA
NO
Prepare Collection Infrormation Statement (CIS) Form 433F
YES
Can Taxpayer Afford Streamline IA
YES
Call ACS or Use OPA to Establish Streamline IA
NO
Can Taxpayer Afford Non Streamline IA?
NO
YES
Call ACS to Establish Non Streamline IA
Does Taxpayer Qualify for PPIA?
YES
Call ACS to Verbally Submit Form 433-F
NO