

The Next Innovation  
from

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**Tax Mentor**



# Resolution Readiness Reports

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A New Report  
EXCLUSIVELY for Tax  
Mentor Members





At a glance reporting  
to identify client  
issues and begin  
solving the problems  
immediately

Ideal for use  
during initial  
investigation,  
onboarding, &  
engagement

Report ONLY available  
via Tax Help Software  
(THS)



Home/Main

Workflow/Notes

Dependents

IRS Contacts

State & Local Taxes

CAF Check

IRS Status

Resolution & Collections

IRS Account Balance  
Summary

Returns

Wage & Income

Estimated  
CSED/Bankruptcy  
Calculator

Civil Penalties

Account Transactions

Payments Tracking

View Transcripts

View Documents

View Account Notices &  
Changes

Businesses

☒ Active

Quick Save

Add as a Spouse

Separate Spouse

☐ Intelli-Order

☐ Intelli-Order Civil Penalties

Customer Type

Customer Code/ID

Taxpayer

SSN

First Name

Middle Initial

Last Name

Birth Date  (mm/dd/yyyy)

Address

Street

City

State

Zip

Lookup

Audit Detection Product  (mm/dd/yyyy)

Expiration Date  (mm/dd/yyyy)

Form 2848 Signed Date  (mm/dd/yyyy)

Form 8821 Signed Date  (mm/dd/yyyy)

Spouse

SSN

First Name

Middle Initial

Last Name

Birth Date  (mm/dd/yyyy)

Contact Information

Home Phone

Spouse Home Phone

Work Phone

Extension

Spouse Work Phone

Extension

Cell Phone

Spouse Cell Phone

Best Time to Call

Primary Phone

Secondary Phone

mail

y Email

Transcript Analysis Reports

Report	Date	View
Standard Reports		
Taxpayer PDF Transcript Analysis	2023-02-23	<a href="#">View Report</a>
Taxpayer Post Filing Income Verification	2023-02-23	<a href="#">View Report</a>
EZ Report		<a href="#">View Report</a>
Resolution Readiness Report (by TM)	2023-02-23	<a href="#">View Report</a>
Resolution		<a href="#">View Report</a>
Custom Reports		
Create New Custom Report	2023-02-23	<a href="#">New Report</a>
Full Report	2023-02-23	<a href="#">View Report</a>

Request Transcripts

[View Video](#)

IRS Forms

Generate Reports

Calculate CSED/Bankruptcy

Resolution Quick Check

Upload Transcripts to Tax Mentor

Intelli-Ordering Dates

Last Full Refresh Request

Reset

Last Issue/Missing Request

Reset

OK

Cancel

Access Resolution  
Readiness Report in  
Client Account

To return to main Taxpayer screen  
click on top tab "Home/Main"



# Overview of the Resolution Readiness Report



Tax Filing Compliance	YES	Active Audit or Exam	NO	Upcoming Appeal Deadline	NO
In Active Collections	YES	Assigned To Private Collections Agency	NO	Passport Certified For Revocation	NO
Penalty Abatement Opportunity	NO	Tax Lien Filed	NO	Estimated Monthly Payment	\$1,291.24

Year	Return Filed	Filing Status	Lien Active	Final Notice of Intent to Levy	Collections Active	Exam/Audit Active	THS Calculated CSED	Last Activity	Last Activity Date	Total Balance
2023	RDNF	Uk								-
2022	No	S		none						(\$1,300.00)
2021	Original	S		none			11/8/2032			\$0.00
2020	Original	S		none			3/9/2031			\$0.00
2019	Original	S		none	No		2/12/2032	No longer in installment agreement status	1/23/2023	\$1,908.48
2018	Original	S		none	No		12/26/2029	No longer in installment agreement status	1/23/2023	\$3,572.58
2017	Original	S		none	No		8/7/2028	No longer in installment agreement status	1/23/2023	\$6,710.09
2016	Original	S		none	No		1/2/2028	No longer in installment agreement status	1/23/2023	\$12,792.60
2015	Original	S		none	No		1/4/2028	No longer in installment agreement status	1/23/2023	\$17,520.65
2014	Original	S		11/13/2015	2/22/2023		8/20/2025	No longer in installment agreement status	1/23/2023	\$13,203.90
2013	Original	S		none			8/14/2024	No longer in installment agreement status	11/7/2022	\$0.39
2012	Original	MFJ		none			7/4/2023	No longer in installment agreement status	10/12/2020	\$0.00
2011	Original	MFJ		none			6/28/2022	No longer in installment agreement status	8/21/2017	\$0.00
2010	Original	MFJ		none			6/30/2021	No longer in installment agreement status	2/10/2014	\$0.00
							TOTAL			\$55,708.69



Tax Filing Compliance YES  
In Active Collections YES  
Penalty Abatement Opportunity NO

Active Audit or Exam NO  
Assigned To Private Collections Agency NO  
Tax Lien Filed NO

Upcoming Appeal Deadline NO  
Passport Certified For Revocation NO  
Estimated Monthly Payment \$1,291.24

Tax Filing Compliance

YES

Missing Tax Returns

Will List Tax Periods not on File in Compliance Period

In order to qualify for an Installment Agreement the IRS requires that a taxpayer be in compliance with tax return filings for the current year and prior five years. The IRS may waive filing for years where a filing requirement does not exist (see IRM 5.14.1.4.2).

Active Audit or Exam

NO

Tax Periods

Will List Tax Periods with an ACTIVE Audit/Exam Transaction Code

Frequently, but not always, once a return is selected for examination a transaction code is placed on the account module and should be visible on the account transcript. This is the beginning of the survey period. However, further actions, such as the issuing of IRS notices or the Notice of Deficiency, are not usually represented on Account Transcript. A call to the IRS is frequently required to confirm status of the exam.

Upcoming Appeal Deadline

NO

Collection Due Process & Equivalent Hearing ONLY – will provide dates when present

Final Notice of Intent to Levy – Can elect a timely Collection Due Process (CDP) Hearing by filing Form 12153 within 30 days, starting the day after the Notice of Intent to Levy was Issued. An Equivalency Hearing can be elected by filing Form 12153 within one year, starting the day after the Notice of Intent to Levy was Issued.  
Notice of Federal Tax Lien – Can elect a timely Collection Due Process (CDP) Hearing by filing Form 12153 within 30 days, starting 5 business days after filing of the NFTL. An Equivalency Hearing can be elected by filing Form 12153 within one year, starting 5 business days after filing of the NFTL.

Tax Filing Compliance	YES	Active Audit or Exam	NO	Upcoming Appeal Deadline	NO
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In Active Collections

YES

A taxpayer is in active collections when the IRS has met all required pre levy notifications and may levy the taxpayer at any time without additional notification being legally required.

Assigned to Private Collections Agency

NO

Congress requires the IRS to hire Private Collection Agencies (PCA) to assist in collecting certain overdue tax accounts. Notice CP40 issued by the IRS will contain details on the assigned PCA and a taxpayer authentication number which will be needed to speak with the PCA.

Passport Certified for Revocation

NO

The Fixing America's Surface Transportation (FAST) Act requires the IRS to certify seriously delinquent taxes to the State Department for potential revocation or denial of the taxpayer's passport. IRS Notice CP508C will be issued upon certifying the debt, the State Department will notify the taxpayer in writing if their passport is revoked, or an application is denied.

Active Collections = Final Notice of Intent to Levy Issued (appeals period lapsed) and no other status which would prevent collections (i.e. Installment Agreement, Pending OIC, CNC, Pending Innocent Spouse, etc.).

\*\*\*Does NOT mean that the taxpayer is under levy just that they are eligible



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Eligible for First Time Abatement	NO				
Tax Lien Filed	NO	Tax Periods			
Streamline Installment Agreement	NO		Non Streamline Installment Agreement	YES	\$1,291.24

In order to be eligible for an IRS Installment Agreement ALL required compliance returns must be on file.

Installment Agreement figures are estimates and based on the IRS transcripts provided. Minimum Installment Agreement amounts may vary based on additional balance dues not present on this report.

A Streamline Installment Agreement offered by the IRS to Individuals with assessed balances under \$50k which generally prevents the filing of a tax lien. See IRM 5.14.5.2.

A Non Streamlined Installment Agreement is considered when the taxpayer cannot qualify for a Streamline Installment Agreement. The agreement must be fully paid prior to the Collection Statute Expiration Date. A Collection Information Statement is not required for Individual balances under \$250k assessed assigned to Automated Collection System (ACS). A tax lien required. See IRM 5.19.1.6.4(12).

If not eligible, or cannot afford, a Streamlined or Non Streamlined Installment Agreement complete a Collection Information Statement to determine potential qualification for a Partial Pay Installment Agreement (PPIA), Currently Non Collectible (CNC), or an Offer in Compromise (OIC).

Estimated Monthly Payment is based on balance due present on transcripts and qualification for Streamline and/or Non Streamline IA. The report is NOT making an assessment of taxpayer's finances at this point...strictly a math calculation.

Uses THS FTA Logic, a “Maybe” indicates that transcripts for the entire 3 year look back period were not provided.

## Closer Look at First Time Abatement

Eligible for First Time Abatement		MAYBE			
Year	Penalties Failure to File	Penalties Failure to Pay	Accrued Penalties	Total Abatable Penalties	Active Balance and/or RSED
2009	\$5,837.62	\$6,486.24	\$0.00	\$12,323.86	\$61,705.55

Uses THS FTA Logic, a “Yes” indicates that there are no disqualifying penalties in 3 year look back period.

Penalties eligible  
for FTA per  
Transcript

Active Balance = FTA Approved  
reduces balance due by amount of  
abatement.  
RSED = Eligible for refund of amount  
of abatement not in excess of credits  
with an active RSED

Eligible for First Time Abatement		YES			
Year	Penalties Failure to File	Penalties Failure to Pay	Accrued Penalties	Total Abatable Penalties	Active Balance and/or RSED
2019	\$0.00	\$12.30	\$274.52	\$286.82	\$6,496.71



There is NO impact to  
your Custom  
Consultation  
allocation...generate  
as many Resolution  
Readiness Reports as  
you need

Issues or  
Questions?

Email  
[info@taxmentor.com](mailto:info@taxmentor.com)

Additional  
Features Planned  
for the Future!

