



REPUBLIC OF THE PHILIPPINES  
DEPARTMENT OF FINANCE  
BUREAU OF INTERNAL REVENUE

December 27, 2017

REVENUE MEMORANDUM ORDER NO. 4-2018

Subject: **BIR Service Desk System**

To: **All Internal Revenue Officials, Employees and Other Concerned**

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**I. BACKGROUND**

The BIR Help Desk and Customer Assistance Division (CAD) have used ProInsight System for over ten years in the management, escalation and tracking resolution of concerns/inquiries reported by BIR users and external clients. For BIR Help Desk and CAD to be more effective and responsive, a new BIR Service Desk (CenterPoint) System is now being implemented.

CenterPoint System is a web-based application that enables the creation, maintenance and monitoring of incident reports or service requests raised by end-users. It can accommodate multiple-simultaneous users from BIR offices. Henceforth, designating 'Requester' to access the new system for fast delivery/resolution of concerns.

**II. OBJECTIVES**

This Order is issued to:

1. Prescribe policies and guidelines on the use of CenterPoint System to create, monitor and track resolution of incident reports and ensure service requests are expeditiously acted on.
2. Empower every BIR office to create, monitor and close, through the system, the incidents or service requests affecting their office.
3. Establish a singular and controlled facility of raising and tracking resolution of incident reports and/or monitoring action on service requests.

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### III. POLICIES and GUIDELINES

1. BIR Help Desk shall now be called BIR Service Desk.
2. Heads of BIR offices shall designate a 'Requester' to be given access to the BIR Service Desk System. A username and password shall be provided to the designated 'Requester'.

'Requester' shall refer to the designated employee of the office/division who logs/creates incident report / service request of 'User' in the concerned office.

'User' shall refer to the owner or the person who encounters and raises an issue or incident to the 'Requester' of the concerned office.

'Requester/s' per office/division shall be:

<i>Office</i>	<i>Required No. of Requester/s</i>
All National Office (NO) Offices (excluding LTS)	1 per Office
Revenue Regions (RR)	1 per Regional Office
All Divisions under RR	1 per Division
Revenue District Offices (RDOs)	2 per RDO
Large Taxpayers Service (LTS)	1 for LTS
All Divisions under LTS	2 per Division
LTD – Davao	2 for LTD – Davao
LTD – Cebu	2 for LTD - Cebu

3. The latest version of Google Chrome and/or MS Edge shall be installed in a workstation to access the BIR Service Desk System and shall be accessible via intranet, through <http://servicedesk.bir.gov.ph/Centerpoint/>.
4. All incident reports / service requests of every office shall be created electronically through the BIR Service Desk System by the 'Requester' officially designated by the concerned office.
5. If the BIR Service Desk System is not available/accessible, the Service Desks of National Office (NO), Revenue Data Centers (RDCs) and CAD shall manually create/log the incident report/service request using the BIR Service Desk Request Form (**Annex A**). A manual numbering system shall be devised to track the incident report/service request received through call, email or in person. These incident reports/service requests shall be logged into the system once the system becomes available/accessible.
6. If an office is unable to access the BIR Service Desk System, the designated 'Requester' shall raise the incident report/service request thru call or in person.
7. BIR Service Desk System, including CAD, shall be for internal users only. In turn, CAD shall use the BIR Service Desk System to log/raise incident reports / service requests of external users to the appropriate Problem Resolution Groups.

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8. If the 'Requester' is not available, the 'User' can directly report thru email, call, or in person the issue to the Service Desks of NO and RDCs for the creation of the incident report/service request.
  9. All concerned personnel are strongly encouraged to open their BIR official email accounts regularly to ensure that all incoming emails, particularly notifications on service requests, are received and processed on time.
  10. Service Desks of NO, RDCs and CAD shall close all resolved incident reports / service requests after one (1) month of no confirmation response from the 'Requester'. Except for QMS sites (ISO Certified Districts), incident report/service request shall be closed per quality plan.

#### IV. PROCEDURES

##### A. Designated Requester of Concerned BIR Office

1. Receive incident report / service request of concerned office using the Service Request Checklist (**Annex B**) duly filled up by 'User' containing standard format of request/incident for the Request Title and Request Description including required attachment.
2. Log into the BIR Service Desk System <http://servicedesk.bir.gov.ph/Centerpoint/>.
3. Create/Log incident report / service request by filling up all required fields in the system:
  - **Status** - (defaulted to Open) status for creation of incident report/service request
  - **Request Title** – title of incident report/service request
  - **Request Description** - entry for specific details of incident report/service request
  - **Service Desk Site** – (Drop Down List) Service Desk jurisdiction and location of 'Requester/User'
  - **Source** – (Drop Down List) origin or basis of incident report/service request being handled
  - **Category** – (Drop Down List) classification or type of incident report/service request
  - **Sub Category** – (Drop Down List) sub classification or type of incident report/service request
  - **Related Information** - Customer Profile of 'Requester/User' to appear in the Customer Information of incident report/service request
  - **Hardware Information** – entry for details of hardware (equipment model, property number and serial number)
  - **Add Files** – attachment of files to support in the resolution of incident report/service request when necessary

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Upon saving of the incident report/service request, a confirmation message shall be displayed at the page and a Service Request Number shall be automatically generated, as reference number for checking the status of the incident report/service request.

4. Receive email notification upon creation and on every status update made in the incident report/service request.
5. Monitor status of incident report/service request.
6. Provide feedback on status of incident report/service request to 'User'.
7. Post comment/s on the Journal Updates section of the system when necessary.
8. Cancel service request when erroneously created, incomplete data or duplicate service request has already been logged.
9. Close resolved incident report/service request when satisfied with the resolution; otherwise Reprocess request when not satisfied with the provided resolution.

#### **B. BIR Service Desk Analyst/Supervisor (NO and RDCs) and CAD Agent/Supervisor**

1. Create incident report / service request.
2. Manually log/create incident report/service request if the system is not available/accessible.
3. Review incident report/service request as to completeness.
4. Create and update Customer Information of BIR personnel when necessary.
5. Notify 'Requester' for incomplete data. If no response is received from 'Requester' within two (2) working days, the service request shall be cancelled.
6. Cancel service request when erroneously created or duplicate service request has already been logged.
7. Receive email notification upon creation and on every status update made in the incident report/service request.
8. Provide first-level resolution to incident report/service request.
9. Escalate incident report/service request to concerned Problem Resolution Group/Assignee.

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10. Process, monitor and provide update on status of incident report/service request.
11. Post comment/s on the Journal Updates section of the system when necessary.
12. Confirm and verify resolved incident report/service request from 'Requester/User'.
13. Close resolved incident report/ service request.
14. Generate, validate and submit reports on the status of incident reports/service requests and other related management reporting.
15. Maintain the Knowledgebase of the system thru collection and validation of resolutions from incident reports/service requests and relevant data/information such as job aids, manuals, revenue issuances and others.
16. Update Service Request Checklist when necessary.
17. Prepare and validate application and database migration request of the BIR Service Desk System when necessary.
18. Prepare and validate access request of the BIR Service Desk System when necessary.

#### **C. Problem Resolution Group Concerned**

1. Receive email notification on every status update made in the incident report/service request.
2. Investigate and analyze Escalated and Reprocess incident report/service request thoroughly
  - Change the statuses Escalated and Reprocess to In Progress if fix/investigation is still ongoing.
  - Change the statuses Escalated and In Progress to Resolved if fix/resolution is completed
3. Process and provide update on status of incident report/service request.
4. Post comment/s on the Journal Updates section of the system when necessary.
5. Resolve incident report/service request within the required or agreed service level agreement.
6. Generate Request Management Log (RML) Summary Report as needed.
7. Create incident report/service request when necessary.

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**D. Systems Administrator - Data Warehousing and Systems Operations Division - (DWSOD)**

1. Perform user administration of the BIR Service Desk System.
2. Perform administration and monitoring of the production/staging servers of the BIR Service Desk System.
3. Receive and implement application migration request of the BIR Service Desk System.

**E. Database Administrator - DWSOD**

1. Maintain the User Roles and List of Values of the BIR Service Desk System.
2. Manage the database of the BIR Service Desk System and monitor generated backup sets.
3. Receive and implement database migration request of the BIR Service Desk System.
4. Perform database restoration/recovery when the need arises.

**F. Security Analyst - Security Management Division (SMD)**

1. Monitor/analyze and investigate all Service Desk incidents through audit trail.

**G. Quality Analyst - SMD**

1. Receive properly accomplished BIR Form Nos. 0044 (Request for System Access), 0037 (Request for Revocation of Access) and other related documents of all users of BIR Service Desk System.
2. Verify/validate the User Master List and process the access request.

**V. EFFECTIVITY**

This Order shall take effect immediately.



CAESAR R. DULAY

Commissioner of Internal Revenue

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