Area 3 IMRS Updates Web Conference Summary
February 21, 2023

IRS Online Account

- Establish an Online Account with ID.me to set up a username and password for the first time OR use an already established username and password.
- Users can quickly look up personal tax information:
    - View data from recently filed returns, access transcripts, view digital copies of certain notices
    - View amounts owed with breakdown by tax year
    - Create payment plans and view payment plan details
    - Make payments from your bank account or via debit/credit card
    - View up to 5 years of payment history, including estimated tax payments
    - View and approve Tax Pro Authorizations
    - Go paperless for certain notices and receive e-mail notification for new notices
- Review the Online Account webpage for more information
- Refer to Publication 5533, Access Your IRS Online Account for more information.

Direct Deposit Option for Form 1040-X

- Taxpayers electronically filing Form 1040-X will be able to select direct deposit for their refund
- Taxpayers still have the option to submit a paper 1040-X and receive a paper check, but direct deposit **IS NOT** offered for paper 1040-X filings
- Current processing time is more than 20 weeks for both paper and electronically filed amended returns as both require manual processing
- Filing 1040-X electronically will eliminate mail time and when including direct deposit information you will provide a secure and faster way to receive refunds

Responding to a Data Breach

- Report client data theft to your Local Stakeholder Liaison (SL)
- If reported quickly, IRS will take steps to block fraudulent returns in your clients' names
- Your SL will gather and submit your information to the Return Integrity Compliance Services (RICS) Team. You should then be prepared to submit a complete client list so RICS can begin the process of protecting all your clients.
- Contact the IRS and law enforcement
    - Your local FBI office, if directed by the IRS
    - Local police to file a report on the data breach
- Contact the state(s) in which you prepare returns
    - E-mail Federation of Tax Administrators at StateAlert@taxadmin.org for information on how to report victim information to the states

  - State Attorney General office(s) need to be notified of the breach
- Contact security experts to determine the cause and scope of the breach, to stop the breach and to prevent future breaches
- Contact your insurance company to report the breach and to see if your policy covers electronic data breach mitigation and cybertheft remediation expenses

Webinars

Current listing - Webinars for Tax Practitioners

Recently archived webinars –

- K2/K3 With a Focus on the Foreign Tax Credit - Individuals
- Practical Considerations – Foreign Tax Credit Form 1116
- Streamlined Domestic Offshore Procedures, FBAR and Form 8938
- Internal Revenue Service (IRS) and Federal Trade Commission (FTC) presents: Scams, Tax Related Identity Theft and Identity Protection PIN
- Estate and Gift Tax
- Looking to Tax Year 2022: American Rescue Plan Tax Changes to Earned Income Tax Credit and Other Child-Related Credits

For a list of all archived webinars visit IRS Video Portal Home Page (irsvideos.gov).

Note: Continuing Education credits are not available for archived webinars.

Issues

1. An Illinois practitioner asked if the owner of a non-profit organization 501(c)(3), dies do the organization close?

Response: Contact IRS Exempt Organizations. To learn more information about charitable organizations, refer to Charitable Organizations.

Status: closed

2. An Indiana practitioner asked can I have an individual online account and also a business online account?

Response: At this time, Online Account does not exist for businesses, but IRS plans to develop an online account for business taxpayers in the future. For more information, refer to Frequently Asked Questions About Your Online Account .

Status: Closed

3. An Indiana practitioner asked If I cannot have an online business account, how do I ask a client for an electronic Power of Attorney form?

Response: You can request Power of Attorney (POA) or Tax Information Authorization (TIA) online with Tax Pro Account as an individual tax professional. To complete a Tax Pro Account authorization request, the individual taxpayer must have access to an IRS online account. Pending authorization requests will appear on the taxpayer's Authorizations tab in the online account display.

You can still submit an authorization request using Tax Pro Account even if the taxpayer doesn't yet have access to an online account. Once the taxpayer has registered for online account access and logged in, they will see the request on the Authorizations tab.

For additional information visit Use Tax Pro Account.

Status: Closed

4. A Michigan practitioner asked can IRS revise Form W-4 to add the option to claim "Married, but withhold at higher Single rate"? Additionally, can the option for flat amount tax payment be added for non-periodic payments?

Response: This issue is being elevated by the local Stakeholder Liaison.

Status: Open

5. A Michigan practitioner asked, if on a call with the Practitioner Priority Service (PPS) line and the call disconnects why not have the options for the CSR to call the practitioner back? I was recently working with a CSR and was placed on a 5 - 7 minute hold when the line disconnected. I had to call back, be placed in the queue again, work with a new CSR, fax my POA form again, etc.

Response: This issue was raised previously. The customer service telephone lines are only set up for in-bound calls. Out-going calls are not an option.

Status: Closed

6. What is the processing timeframe for a paper return and a CP 2000 response?

Response: For the most current information about processing timeframes visit Processing Status for Tax Forms.

Status: Closed

Feedback

A North Carolina practitioner stated the new Form W-4 is difficult for taxpayers. Taxpayers do not understand the form any better than tax professionals. Taxpayers do not understand the questions and the Tax Withholding Estimator is also very confusing for most taxpayers.

An Illinois practitioner stated many of the teenagers that are filling out the Form W-4 have no idea how to fill it out and neither do their parents.

An Illinois practitioner stated they were able to get through on the PPS line and recent attempts had shorter wait times.

An Indiana practitioner stated they attempted to use the upload tool and got a bit frustrated. The upload limit is 15MB. The file was 47 pages, and the file size was 24 MB. There was an option to separate the documents, but he was concerned the documents would not be associated with one another after transmittal. He opted to fax the document to the Ogden Correspondence Audit unit. The file limit of 15MB is too small.

An Illinois practitioner stated the IMRS meeting is a very good forum. He looks forward to continued participation.

Reminders

Taxpayer Assistance Centers (TACs) across the country will be holding Special Saturday hours. During these Saturday hours people can walk in for all services routinely offered at the office and an appointment **is not** required. Visit IRS Face-to-Face Saturday Help for dates and locations.

To attend the monthly payroll call, send an e-mail to sbse.payroll@irs.gov for an invitation. The call is for payroll providers only. The call takes place on the first Thursday of each month at 1 pm ET.

The IRS is hiring!! Visit the IRS Careers – Events page to learn more about the Virtual Information Sessions we are hosting. Also visit USAJOBS - The Federal Government's official employment site to see the positions available. Please share the information amongst your networks.

Communications & Liaison
Stakeholder Liaison

Our next meeting is scheduled March 21, 2023 and will be hosted on Microsoft Teams.
During the March meeting we will decide whether to reschedule or cancel the April meeting.

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