

Date: December 11, 2019 (Wednesday)

Meeting Subject: IRS Illinois Practitioner Liaison Meeting

Chicago, Illinois

8:30 a.m. – 12:30 p.m.

MEETING SUMMARY

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Current IRS Outreach Initiatives – Information for Your Practice and Your Clients

Taxpayer First Act – The Law Seeks to Broadly Redesign the IRS- IRS Seeks Suggestions from Tax Professionals and Taxpayers

<https://www.irs.gov/taxpayer-first-act>

Federal Law Requires Tax Professionals to Create, Implement and Maintain a Security Plan to Protect Client Data

<https://www.irs.gov/identity-theft-fraud-scams/identity-theft-information-for-tax-professionals>

2020 Form W-4 (Employee’s Withholding Certificate) is Available

<https://www.irs.gov/forms-pubs/about-form-w-4>

Use the Tax Withholding Estimator on IRS.gov to Help Your Clients Withhold the Correct Amount of Federal Income Tax

<https://www.irs.gov/individuals/tax-withholding-estimator>

IRS Publications 5348 (Get Ready to File) and 5349 (Year-Round Tax Planning is for Everyone) are Available for Distribution to Your Clients

<https://www.irs.gov/pub/irs-pdf/p5348.pdf>

<https://www.irs.gov/pub/irs-pdf/p5349.pdf>

IRS.gov’s Gig Economy Tax Center Resources are Available to Help Understand and Comply with Tax Laws Applicable to the Gig (Sharing) Economy Workers

<https://www.irs.gov/businesses/gig-economy-tax-center>

IRS Provides Assistance to Taxpayers Who Are Victims of Tax Identity Theft

<https://www.irs.gov/newsroom/taxpayer-guide-to-identity-theft#1>

IRS Provides Assistance to Tax Professionals Who are Victims of Tax Data Theft

<https://www.irs.gov/identity-theft-fraud-scams/identity-theft-information-for-tax-professionals>

Tax Reform: Qualified Business Income Deduction (IRS Section 199A) –
IRS.gov has the Information You Need for Your QBID Questions

<https://www.irs.gov/newsroom/qualified-business-income-deduction>

Tax Reform: Basics for Employers

<https://www.irs.gov/newsroom/businesses>

Tax Reform: Highlights for Individual Taxpayers

<https://www.irs.gov/newsroom/individuals>

Tax Reform: Opportunity Zones - Qualified Opportunity Zones Have Been Designated to Encourage Tax-Favored Investment in Distressed Communities Throughout the Country and in U.S. territories.

<https://www.irs.gov/newsroom/opportunity-zones-frequently-asked-questions>

Presentations from Representatives of IRS Operating Units

IRS Taxpayer First Act Office (TFAO) – Laurie Tuzynski, Senior Level Advisor to the Small Business/Self-Employed Division Commissioners and SB/SE Contact with the TFAO

Issues submitted to Laurie Tuzynski by the Tax Professionals in Attendance

- 1) IRS needs to post payments received on a timely basis.
- 2) IRS needs to respond timely to information provided. For example, taxpayer will receive a notice for information, respond and not hear back from IRS for 6 months.
- 3) IRS is not always sending notice CP522 (Request for Updated Financial Information to Review Your Partial Pay Installment Agreement) before sending notice CP523 (Default on Your Installment Agreement Notice - Intent to Terminate Your Installment Agreement) though the IRS computer system identifies that CP522 has been sent.

- 4) Taxpayers are receiving IRS notices which identify that the taxpayer has 60 days to respond to the notice. In the meantime, Collection sends out a Notice to Levy during the 60-day time period.
- 5) Reestablish a position similar to the former District Director in order to give people a local contact and a local resource to fix problems.
- 6) IRS phone systems need to implement courtesy callbacks when calls are disconnected.
- 7) The Practitioner Priority Service should implement a "gatekeeper" to move practitioners to the correct IRS contact.
- 8) IRS needs to implement an online practitioner portal which would allow them to see the federal tax payments made by their clients during the year.
- 9) Create a database that practitioners can access which identifies Forms 2848 on file by the practitioner's PTIN.
- 10) Identify within IRS publications the Internal Revenue Code, Treasury Regulations and other IRS guidance which is the source of the information provided in the publications.
- 11) IRS e-Services should be expanded to allow practitioners to obtain client payoff information.
- 12) Allow the filing of Forms 2848 electronically through e-Services.
- 13) The TE/GE IRS phone hotline is a nightmare. There is also a need on this phone line for courtesy callbacks when disconnected.
- 14) Post the SAMS (Systemic Advocacy Management System) link right on the irs.gov main page and on the tax pros main page to identify and encourage identification of IRS systemic issues.

IRS Counsel, Division Counsel, Small Business/Self-Employed – Elke Franklin, Area Counsel

- The Chicago counsel's office has hired new attorneys. The hope is that the Chicago office will have approximately 100 employees by Fall 2020 up from approximately 70 eight years ago.
- Counsel is working with to resolve cases as early in the process as possible. There are approximately 4,000 cases being worked in the Chicago office.
- Counsel is looking to use more settlement outreach days in 2020. Look for upcoming information.

Communications & Liaison, Stakeholder Liaison – Kristen Hoiby, Area Manager

- Kristen welcomed the attendees and discussed the current operations of Stakeholder Liaison and the importance of the relationships which SL maintains with the Illinois practitioner organizations.

Taxpayer Advocate Service (TAS) – Andrew VanSingel, Supervisory Associate Advocate

The Chicago TAS Office is Looking to Hire More Employees

- Any positions will be posted on www.USAJOBS.gov

Publication 5341 (Taxpayer Roadmap) is Available for You and Your Clients Illustrating the Stages of a Taxpayer's Journey

- <https://taxpayeradvocate.irs.gov/roadmap>
- The map illustrates, at a very high level, the stages of a taxpayer's journey, from getting answers to tax law questions, all the way through audits, appeals, collection, and litigation. It shows the complexity of tax administration, with its connections and overlaps and repetitions between stages. As the maps illustrates, the road to compliance isn't always easy to navigate. But we hope this map helps taxpayers find their way.

TAS Overview, Annual Report to Congress & National Taxpayer Advocate's Objectives Report

- The Taxpayer Advocate Service (TAS) *is your voice at the IRS*. TAS' job is to ensure that every taxpayer is treated fairly, and that they know and understand their rights. TAS offers free help with IRS problems that taxpayers can't resolve on their own
- If you are experiencing a hardship or systemic issue, and your case meets our criteria, please contact our office. TAS is here to help but is not a substitute for the normal processing channels. Information regarding the criteria can be found at Internal Revenue Manual section 13.1.7 which you can find through www.irs.gov at https://www.irs.gov/irm/part13/irm_13-001-007.html
- The Annual Report to Congress delivered at the end of December, includes: A summary of the 20 most serious problems encountered by taxpayers; recommendations for solving those problems; and other IRS efforts to improve customer service and reduce taxpayer burden. <https://www.irs.gov/advocate/reports-to-congress>
- The fifth most serious problem identified in the report identified that the IRS' fraud detection systems for refundable tax credits are marred high false positive rates, long processing times and unwieldy processes plaguing the IRS and harming taxpayers. It has led to a significant increase in TAS cases.

- The Objectives Report, delivered each June, contains the goals and activities planned by the Taxpayer Advocate for the coming year.
<https://www.irs.gov/advocate/reports-to-congress>

Taxpayer Bill of Rights

- IRS has adopted a **Taxpayer Bill of Rights** as proposed by National Taxpayer Advocate Nina Olson. It applies to all taxpayers in their dealings with the IRS. The Taxpayer Bill of Rights groups the existing rights in the tax code into ten fundamental rights, and makes them clear, understandable, and accessible. You can find additional information at <https://taxpayeradvocate.irs.gov/taxpayer-rights>.

TAS in Illinois

- The different methods available to contact the TAS are identified at <https://www.irs.gov/Advocate>. The national phone hotline is 877-777-4778.

There are 2 TAS offices in Illinois.

City	Address	Phone	Fax
Chicago	230 S. Dearborn St., Room 2820, Stop 1005-CHI, Chicago, IL 60604	312-292-3800	855-833-6443
Springfield	3101 Constitution Drive, Stop 1005 SPD, Springfield, IL 62704	(217) 993-6714	855-836-2832

- You can also call the **Taxpayer Advocate Service toll-free at 1-877-777-4778**, or fill out [Form 911, Request for Taxpayer Advocate Service Assistance](#), and fax or mail it to the address above.

Taxpayer Advocacy Panel

- **IRS Taxpayer Advocacy Panel (TAP)**. The Taxpayer Advocacy Panel, a Federal Advisory Committee to the Internal Revenue Service (IRS), helps to identify tax issues of importance to taxpayers and to provide a taxpayer perspective to the IRS on key programs, products, and services. It also serves as a focus group that makes recommendations to the IRS and the National Taxpayer Advocate.
- TAP members participate in meetings and focus groups and develop and submit recommendations to improve the IRS. Have a suggestion for improving the IRS and don't know whom to contact? We would like to hear from you. If you have a suggestion to improve the IRS, Speak Up! **Contact TAP at 1-888-912-1227 (toll-free number)**.

TAS' Systemic Advocacy Management System – Help TAS Tackle IRS Systemic Issues

TAS operates the **Systemic Advocacy Management System**. You can help the Taxpayer Advocate Service tackle the “big-picture” problems in the IRS or the tax law by reporting them to us. These *systemic issues*: Always affect multiple taxpayers; Don't apply to just one taxpayer (but if you personally have an unresolved IRS problem, [TAS may be able to help](#)); Involve IRS systems, policies, and procedures; Involve protecting taxpayer rights, reducing burden, ensuring fair treatment, or providing essential taxpayer services.

<https://www.irs.gov/Advocate/Systemic-Advocacy-Management-System-SAMS>

Specialty Examination, Estate & Gift Tax - Small Business/Self-Employed Division, Ross Mulder, Supervisory Attorney

Estate & Gift Tax Resources on IRS.gov

- <https://www.irs.gov/businesses/small-businesses-self-employed/estate-and-gift-taxes>

What's New Estate & Gift Taxes

- The latest news from Estate & Gift taxes can be found at <https://www.irs.gov/businesses/small-businesses-self-employed/whats-new-estate-and-gift-tax>

Guidance Relating to the Availability and Use of an Account Transcript as a Substitute for an Estate Tax Closing Letter – IRS Notice 2017-12

- Moving away from closing letters. Instead use account transcripts. IRS Notice 2017-12 <https://www.irs.gov/pub/irs-drop/n-17-12.pdf> provides that information.

Treasury Decision 9884 - Final Regulations Confirm Making Large Gifts Now Won't Harm Estates After 2025

<https://www.irs.gov/newsroom/final-regulations-confirm-making-large-gifts-now-wont-harm-estates-after-2025>

Revenue Procedure 2017-34 Provides a Simplified Method for Certain Taxpayers to Obtain an Extension of Time Under § 301.9100-3 of the Procedure and Administration Regulations to Make a “Portability” Election under § 2010(c)(5)(A) of the Internal Revenue Code

<https://www.irs.gov/pub/irs-drop/rp-17-34.pdf>

Office of Appeals, Collection – Paul Mazan, Appeals Team Manager

Appeals Collection Current Initiatives

- Appeals Collection is also looking to hire more employees. Positions which become available to the public will be posted on www.USAJOBS.gov. Appeals as an organization is hoping to get to a total staffing level of about 1,300. Currently, the staffing level is at about 1,000.
- The organization is developing procedures to comply with the Taxpayers First Act law.
- Appeals continues to push the use of the WebEx online meeting technology in order to provide “in-person” Appeals conferences.

Appeals Collection Resources for Tax Professionals & Their Clients

- Appealing an IRS Collection decision information page on IRS.gov at <https://www.irs.gov/appeals> .

Office of Appeals, Examination – Jim Helfrich, Appeals Team Manager

Recent Policy and Procedural Changes to Re-emphasize Appeals’ Independence

- <https://www.irs.gov/pub/irs-utl/factsheet.pdf>
- https://www.irs.gov/pub/irs-utl/office_of_appeals_faqs.pdf

Appeals Exam Resources for Tax Professionals & Their Clients

The Appeals web site found at <https://www.irs.gov/appeals> .

Appeals Mediation Programs

The mediation programs available under the examination process are **Fast Track Settlement (FTS) and Early Referral**.

Fast Track Settlement offers Small Business/Self-Employed taxpayers an opportunity to resolve tax disputes at the earliest possible stage in the examination process. Once your application is accepted, the goal is resolution within 60 days.

With FTS, a trained mediator from the IRS Office of Appeals is assigned to help you and the IRS reach an agreement on the disputed issue(s). You retain full control over every decision you make during the FTS process. In addition to using mediation techniques to facilitate settlement discussions, the Appeals mediator may offer settlement proposals and use Appeals’ settlement authority, if needed, to resolve the dispute. Either you or the IRS may agree to or deny the Appeals mediator’s settlement proposal.

The Early Referral to Appeals program allows a taxpayer to request early referral to Appeals of developed unagreed issue in an open audit (prior to 30-day letter). Taxpayer and the IRS team manager agree issue should be referred early. Remaining issues are not expected to be completed before Appeals resolve early referral issue.

Closing agreements are executed if agreement is reached. If agreement is not reached, taxpayer may request mediation or will be issued a statutory notice of deficiency.

Post-Appeals Mediation (PAM) lets you and your Appeals Officer or Settlement Officer resolve disputes while your case is still under Appeals' consideration. Once your PAM application is accepted, the goal is resolution within 60-90 days.

With PAM, a trained mediator from the IRS Office of Appeals is assigned to help you and your Appeals Officer or Settlement Officer reach an agreement on the disputed issue(s). PAM does not create any special authority for settlement by Appeals. You retain full control over every decision you make during the PAM process. No one can impose a decision on either you or Appeals.

Appeals Judicial Approach and Culture Project (AJAC) - the Appeals Judicial Approach and Culture (AJAC) project was started in 2012 to ensure the policies and practices of the Office of Appeals (Appeals) are consistent with its mission. The role of Appeals is to settle disputes on a fair and impartial basis that favors neither the government nor the taxpayer.

Appeals should not perform compliance actions. Rather, Appeals' role is to attempt to settle a case after IRS compliance functions (which include Accounts Management, Collection and Examination) have decided to which the taxpayer does not agree.

Field Examination - Small Business/Self-Employed, Examination Operations, Midwest Area – Inez Moss, Group Manager

Exam Organization Updates

- Small Business/Self-Employed is looking to hire 400 revenue agents nationwide.

Exam Program Areas of Emphasis During Fiscal Year 2020

- Exam expects to be hiring in FY 2020.
- Audits that are and will be undertaken during the fiscal year will include an increased focus on flow-through entities due to the increased number of flow-through tax return filings.
- Audits involving abusive tax scheme promoters and abusive tax scheme transactions.
- Audits of the Research & Experimentation Credit, Offshore Voluntary Disclosure and National Research Program cases.

IRS Resources for Tax Professionals to Help Identify Earned Income Tax Credit (EITC) Due Diligence Responsibilities

- <https://www.irs.gov/Credits-&-Deductions/Individuals/Earned-Income-Tax-Credit>
- <https://www.eitc.irs.gov/Tax-Preparer-Toolkit/main>
- <https://www.eitc.irs.gov/Tax-Preparer-Toolkit/ddmodule> - Earned Income Tax Credit Due Diligence Training Module

Examination Resources for Tax Professionals and Their Clients

- “Your Guide to an IRS Audit” is available for viewing at <https://www.irsvideos.gov/Audit/>
- Tax preparer due diligence toolkit available training at <https://www.eitc.irs.gov/tax-preparer-toolkit/welcome-to-the-tax-preparer-toolkit>
- Virtual Currency tax guidance can be found at <https://www.irs.gov/businesses/small-businesses-self-employed/virtual-currencies> .
- Abusive offshore tax avoidance schemes. IRS.gov offers an Abusive Offshore Tax Scheme toolkit at <https://www.irs.gov/Businesses/Small-Businesses-&-Self-Employed/Abusive-Offshore-Tax-Avoidance-Schemes>.
- Information for tax professionals on the common types of abusive tax schemes the IRS sees (and how to report them) is located at <https://www.irs.gov/Businesses/Small-Businesses-&-Self-Employed/Tax-Scams-How-to-Report-Them>.
- Examination also is involved with ID Theft cases. Taxpayers and tax professionals can find IRS resources on Identity Protection: Prevention, Detection and Victim Assistance at <https://www.irs.gov/Individuals/Identity-Protection>.
- Fast Track Settlement offers Small Business/Self-Employed taxpayers an opportunity to resolve tax disputes at the earliest possible stage in the examination process. Once your application is accepted, the goal is resolution within 60 days.

Privacy, Governmental Liaison & Disclosure (Freedom of Information Act (FOIA)) Requests – William White, Government Information Specialist

Freedom of Information Act Resources for Tax Professionals & Their Clients

- Freedom of Information Act request information can be found at <https://www.irs.gov/uac/irs-freedom-of-information>.
- There are 3 ways you can access IRS records:
 - Visit the IRS Electronic Reading Room
<https://www.irs.gov/uac/electronic-reading-room>
 - Use the Routine Access Procedures
<https://www.irs.gov/uac/routine-access-to-irs-records>
 - Make a formal Freedom of Information Act request
<https://www.irs.gov/uac/freedom-of-information-act-foia-guidelines>
- The Electronic Reading Room contains records such as Published Tax Guidance, Rulings, Internal Revenue Manual, Counsel Guidance and Freedom of Information Act Reports.
- The Routine Access Procedures tell you how to secure commonly requested records such as transcripts, copies of returns and tax court opinions.
- A formal Freedom of Information Act request should be made for records not available using the first 2 options.
- Before submitting a FOIA request, take a look at the resources just mentioned as well as the Basic Tools for Tax Professionals page at <https://www.irs.gov/tax-professionals/basic-tools-for-tax-professionals>.
- The information on these pages will help you secure records and information to assist your clients and often the processing times are faster than FOIA requests.
- ***Keep in mind, if you are working directly with an IRS employee on an open tax case, you can request records from the case file directly from the employee.***
- When a FOIA request for your client's tax records is required, your letter must:
 - State that the request is being made under the Freedom of Information Act.
 - Identify the records being sought as specifically as possible including the client's name, address and SSN or EIN.
 - Make a firm commitment to pay any fees which may apply.

- Provide your name, address, signature and Form 2848 or 8821 authorizing you to receive the records.
- The Disclosure Office is required by statute to respond within 20 business days after receipt. However, the FOIA does contain provisions for extensions and they are discussed in the FOIA Guide.
- The FOIA Improvement Act of 2016 made changes to the appeals process when your FOIA request is denied in whole or in part or you receive a no records response. In addition to enclosing the appeals notice, the final response letter must specifically state you can dispute the response by contacting the FOIA Public Liaison and/or the Office of Government Information Services (OGIS) directly.
- Also, it extends the appeals window from 35 days to 90 days after the date of the IRS final response letter.
- To learn more about the IRS Governmental Liaison and Disclosure programs, please go to <https://www.irs.gov/Government-Entities/Governmental-Liaisons>.

Criminal Investigation (CI) – Kathy Enstrom, Special Agent-in-Charge

CI Overview

Criminal Investigation (CI) serves the American public by investigating potential criminal violations of the Internal Revenue Code and related financial crimes in a manner that fosters confidence in the tax system and compliance with the law.

Current Operations Update & CI's Annual Report for Fiscal Year 2019

- CI is now emphasizing a data driven approach to identifying and fighting crime.
- Full information on CI's activities during fiscal year 2019 can be found in its annual report located at https://www.irs.gov/pub/irs-utl/2019_irs_criminal_investigation_annual_report.pdf

Treasury Inspector General for Tax Administration – Erik Harkey, Special Agent

IRS impersonation scam reporting should be made to TIGTA at https://www.treasury.gov/tigta/contact_report_scam.shtml

IRS scam updates can be found at https://www.treasury.gov/tigta/irs_scam_updates.shtml

Small Business/Self-Employed, Collection Operations, Field Collection - David Preston, Program Manager

Employers Using Third Party Payroll Service Providers Need to Monitor the Provider to Ensure they Remain Compliant with Employment Tax Responsibilities

- There was a recent high-profile failure of third-party payroll service provider to remit employment taxes to the IRS. IRS wants to help business owners who use payroll service providers by providing information and tools to ensure they remain in compliance with their employment tax responsibilities. In this effort IRS has produced Fact Sheet 2013-9 and the "[Outsourcing Payroll and Third Party Payers](#)" site on irs.gov.

Current Focus of IRS Revenue Officers Collection Efforts – Federal Tax Deposit Alert Program

- **A Federal Tax Deposit (FTD) Alert penalty program** has been implemented by revenue officers in the field.
- IRS is emphasizing that revenue officers make contact with these taxpayers in the field as face-to-face interactions yield more effective and faster resolutions.
- A variety of useful information is available to employers and their representatives on the IRS Web site. Visit IRS.gov and type "Employment taxes" in the search box. Helpful links include:

[Employment Taxes](#)

[Understanding Employment Taxes](#)

[Depositing and Reporting Employment Taxes](#)

[Employment Tax Publications](#)

[Small Business Taxes – The Virtual Workshop](#)

- **Federal Tax Deposit (FTD) Alerts** are used to determine an employer's compliance with employment tax deposit requirements for the quarter of the Alert issuance, and for subsequent quarters until the taxpayer is brought into full compliance.
- The FTD Alert process identifies, at an early stage (i.e., before the return is due), taxpayers who have fallen behind in their deposits.
- **Internal Revenue Manual section 5.7.1 FTD Alerts** provides information on the program. You can find this IRS section at https://www.irs.gov/irm/part5/irm_05-007-001.html.
- Revenue officers are conducting their investigations in the field with more face-to-face contact with taxpayers.

IRS Collection Employees May Call or Come to a Home or Business Unannounced to Collect a Tax Debt

- <https://www.irs.gov/newsroom/how-to-know-its-really-the-irs-calling-or-knocking-on-your-door>

Virtual Currency (Cryptocurrency) IRS Resources- the sale or other exchange of virtual currencies, or the use of virtual currencies to pay for goods or services, or holding virtual currencies as an investment, generally has tax consequences that could result in tax liability.

- <https://www.irs.gov/businesses/small-businesses-self-employed/virtual-currencies>

Revocation or Denial of Passport in Case of Certain Unpaid Taxes

- <https://www.irs.gov/businesses/small-businesses-self-employed/revocation-or-denial-of-passport-in-case-of-certain-unpaid-taxes>

Payment & Collection Resources for Tax Professionals and Taxpayers

Making federal tax payments - <https://www.irs.gov/Payments>

IRS Payment Plans & Installment Agreements - <https://www.irs.gov/Individuals/Payment-Plans,-Installment-Agreements>

IRS Offer-in-Compromise - <https://www.irs.gov/Individuals/Offer-in-Compromise-1>

Collection Procedures for Taxpayers Filing and/or Paying Late - <https://www.irs.gov/Businesses/Small-Businesses-&-Self-Employed/Collection-Procedures-for-Taxpayers-Filing-and-or-Paying-Late>

Some of the collection presentations available at www.irsvideos.gov include:

- Completing Form 656, Offer in Compromise
- IRS Collection Process Part 2: Partial Payment Installment Agreements and Form 1099-OID Original Issue Discount Refund Scheme
- IRS Publication 4235 "Collection Advisory Group Numbers and Addresses." You can access the publication at <https://www.irs.gov/pub/irs-pdf/p4235.pdf>.
- Lien withdrawal resources for taxpayers and tax professionals can be found at <https://www.irsvideos.gov/?search=liens> .

Small Business/Self-Employed, Collection Operations, Field Collection, Civil Enforcement Advice & Support Operations – Tiffany Insley-Grigg, Management & Program Analyst

Civil Enforcement Advice & Support Operations Profile

- Advisory gives technical guidance to revenue officers and other personnel about Collection issues including liens, levies, litigation and more. They review proposed suits, seizures, summons enforcement, special condition Notice of Federal Tax Liens and other technical items for Collection. Advisory also serves many external customers, advising taxpayers, their representative and third parties on topics such as sale of property, lien certificates, estate taxes, decedent estates, as well as handling suits against the U.S., claims for refund on collection issues and as a contact point for collection of restitution-based assessments.

- Since June of 2018, Notice of Federal Tax Lien filings no longer appear on the credit reports of the 3 major credit bureaus.

Volunteer Income Tax Assistance (VITA) Program

- The Volunteer Income Tax Assistance (VITA) program offers free tax help to people who generally make \$54,000 or less, persons with disabilities, the elderly and limited English-speaking taxpayers who need assistance in preparing their own tax returns. IRS-certified volunteers provide free basic income tax return preparation with electronic filing to qualified individuals
- You can learn about the VITA program at <https://www.irs.gov/individuals/free-tax-return-preparation-for-you-by-volunteers>
- To learn how to become a VITA volunteer go to <https://www.irs.gov/Individuals/IRS-Tax-Volunteers>.
- To apply for a VITA grant to operate a VITA clinic go to <https://www.irs.gov/Individuals/IRS-VITA-Grant-Program>.

Taxpayer Assistance Centers Update

- Nearly every tax issue can now be resolved [online or by phone](#) from the convenience of your home or office. If you need help from a Taxpayer Assistance Center (TAC), call to schedule an appointment. All TACs are now providing service by appointment. Call 844-545-5640 to schedule an appointment.

Communications & Liaison, Stakeholder Liaison – Mike Mudroncik

Free 2020 IRS Tax Calendar

Tax professionals and taxpayers can obtain free 2020 tax calendar information for businesses and the self-employed at <https://www.irs.gov/Businesses/Small-Businesses-&Self-Employed/IRS-Tax-Calendar-for-Businesses-and-Self-Employed>. The calendar information can be accessed either via the online calendar, downloading it into your computer's desktop or by importing it into your computer's calendar program.

Contact IRS Stakeholder Liaison with IRS Policy or Procedure Questions/Concerns

Tax professionals and taxpayers can contact IRS Stakeholder Liaisons to address systemic IRS issues involving practices, policies and procedures. Stakeholder Liaison contact information can be found on the IRS web site at <https://www.irs.gov/businesses/small-businesses-self-employed/stakeholder-liaison-local-contacts> .

Free Electronic Publications for Tax Professionals

The IRS offers numerous to stay up-to-date on federal tax law changes. The list of available publications, subscription and content information can be found at <https://www.irs.gov/uac/e-news-subscriptions-2>

IRS Information is Available through Social Media Resources

<https://www.irs.gov/newsroom/irs-new-media-1>

Tax professionals and taxpayers can access free audio and video presentations

<https://www.irsvideos.gov/>

Issues & Status

See the issues provided to Laurie Tuzynski documented at the beginning of this summary.

Roundtable & Comments

See Issues & Status

Next Scheduled Meeting

Wednesday May 6, 2020
John C. Kluczynski Federal Building
230 S. Dearborn Street
Chicago, IL 60604
8:30 a.m. – 12:00 p.m.