



# Area 3 IMRS Updates Web Conference Summary

## July 18, 2023

### CP14 Notices to Eight States

- Per news release [IR- 2023-121](#), The IRS is sending a special follow-up notice, CP 14CL, to taxpayers in California, Alabama, Arkansas, Florida, Georgia, Indiana, Mississippi and Tennessee to reassure them they have extra time to file and pay their taxes.
- The letters are in English and Spanish.
- The letter also includes additional information to help taxpayers understand the disaster relief they received.
- The IRS also updated the insert accompanying upcoming CP 14 balance due notices to clarify that the payment date listed in the notice does not apply to taxpayers in a federally declared disaster area
- Inserts will be in English and Spanish and include a special QR code for the IRS.gov [disaster page](#).

### Special Summer Campaign - “Protect Your Clients; Protect Yourself”

- Over the next five weeks the IRS and its Security Summit partners will issue a series of news release.
- The weekly messages for the 5-week campaign include:
  - Create a Security Plan
  - Sign up Clients for Identity Protection Pins
  - Phishing, Spear Phishing and Whaling
  - Know the Tell-Tale Signs of Identity Theft
  - Help Clients Protect Themselves Whether Working from Home or Traveling
- [Publication 5461-D](#), reminds tax professionals to review their security protocols and the [Taxes-Security-Together Checklist](#).
- [Publication 5709, How to Create a Written Information Security Plan \(WISP\)](#), addresses developing and maintaining a WISP.
- If you have experienced a data breach or your EFIN has been compromised, please report it to your local Stakeholder Liaison.

### Virtual Listening & Feedback Session- InForm Me App

- IRS’ Enterprise Digitization Office is hosting a virtual listening and feedback session on the InForm Me Mobile app for Area 3 tax professionals.
- The purpose of the app is to allow taxpayers to scan IRS documents with the app and then provide information and guidance about the documents.
- The session will include a demonstration of the InForm Me Mobile app.
- During the session, tax pros can provide feedback and suggestions for the app.



- The listening session will take place on August 17, 2023, from 10:00 am – 11:30 am CST/ 11:00 am – 12:00 pm EST.
- Your local Stakeholder Liaison will send you an invitation for this listening session.
- **Area 3 will host this listening session in lieu of the 3<sup>rd</sup> Tuesday IMRS call scheduled for August 15, 2023.**

**Webinars**

[Employee Retention Credit – July 25, 2023](#)

Current listing - [Webinars for Tax Practitioners](#)

For a list of all archived webinars visit [IRS Video Portal Home Page \(irsvideos.gov\)](https://irsvideos.gov).

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

**Issues**

1. An Illinois practitioner asked if we had a phone number for a director in the Taxpayer Advocate Service (TAS). The practitioner has a client whose case has been assigned to a Case Advocate, but the Case Advocate has not responded to inquiries.

**Response:** If you are not able to reach the assigned Case Advocate you should contact the immediate manager. The assigned Case Advocate is Teresa Robinson, and she is based out of Kansas City, MO. Her immediate manager is Sandra Kent, and she can be reached at 816-499-4066.

Additionally, you can contact the local Taxpayer Advocate office to inquire about your case. There are two offices in Illinois:

Chicago  
 230 S. Dearborn St.  
 Room 2820, Stop-1005 CHI  
 Chicago, IL 60604  
[Telephone: \(312\) 292-3800](tel:(312)292-3800)  
[Fax: \(855\) 833-6443](tel:(855)833-6443)

Springfield  
 3101 Constitution Dr.  
 Stop 1005 SPD  
 Springfield, IL 62704



[Telephone: \(217\) 993-6714](tel:(217)993-6714)  
[Fax: \(855\) 836-2832](tel:(855)836-2832)

**Status:** Closed

2. An Illinois practitioner asked is there is a limit on the number of payments that can be made using [IRS Direct Pay](#).

**Response:** There is not limit on the number of payments you can make using IRS Direct Pay, but IRS Direct Pay won't accept more than two payments **within a 24-hour period**, and each payment must be less than \$10 million. For larger electronic payments, use EFTPS or same-day wire

**Status:** Closed

3. An Illinois practitioner asked if taxpayers can download or look at correspondence that IRS has issued to the taxpayer.

**Response:** Taxpayers can view select notices in their [Online Account](#). The following notices can be viewed: CP01A, CP05A, CP14, CP14H, CP14I, CP21A, CP32, CP39, CP49, CP60, CP62, CP501, CP508C, CP521, CP563C, CP621, CP701S. We do plan to make additional notices available for viewing in Online Account. Online Account is only available to individual taxpayers at this time.

If the taxpayer is working directly with an IRS employee on an open tax case (Exam, Collections, Appeals, etc.), they can request information from the file directly from the IRS employee. See [Routine Access to IRS Records](#) for more information. If the case is closed and no longer being actively worked, you can request copies of correspondence from the file via a [Freedom of Information \(FOIA\)](#) request.

**Status:** Closed

4. A Michigan practitioner stated IRS issued notice [CP01E](#) stating another person may have used their client's Social Security number (SSN) to obtain employment. The letter suggests the taxpayer contact the credit bureaus and consider applying for an IP PIN. Why would IRS not issue an [IP PIN](#) automatically in this case since IRS knows there is an issue?

**Response:** The IRS will only issue an IP PIN for confirmed and resolved cases of [Tax-Related Identity Theft](#). Notice CP01E basically states we suspect someone may be using an SSN for employment, but there is no impact to their tax return or refund. Due to the potential risks associated with identity theft, we are notifying the taxpayer and providing them with steps to take to protect their financial and credit accounts.



**Status:** Closed

5. An Illinois practitioner asked if POAs will be able to see the IRS notices issued in their client's online account.

**Response:** POAs will not be able to view IRS notices in their client's online account. POAs do not have permission to access their client's online account.

**Status:** Closed.

6. An Illinois practitioner asked if there is a virtual option for the Nationwide Tax Forums.

**Response:** The 2023 Tax Forums are in person, but The [IRS Nationwide Tax Forums Online \(NTFO\)](#) provides courses based on taped seminars from previous IRS Nationwide Tax Forums. NTFO courses may be taken for either CPE credit or audit. Registration for NTFO is separate from registration for the IRS Nationwide Tax Forum

**Status:** Closed

7. A Kentucky practitioner asked if there is an IRS webinar available addressing security measures that tax professionals can take to protect their clients and their business.

**Response:** We currently do not have any webinars scheduled for this topic, but you can visit [www.irsvideos.gov](http://www.irsvideos.gov) and view archived webinars. Click on the Tax Professionals tab and select the [Scams and Fraud](#) in the menu for a listing of archived webinars.

**Status:** Closed

### **Feedback**

A Kentucky practitioner stated her client was able to resolve the issue regarding their S-Corp election in less than two month, but she would still like to see the process for the S-Corp election updated.

An Illinois practitioner stated this is the first meeting he had attended and he is thankful for this tax pros outreach program.

### **Reminders**



To attend the monthly payroll call, send an e-mail to [sbse.payroll@irs.gov](mailto: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.

Our next meeting is scheduled September 19, 2023, on Microsoft Teams

**Area 3 Stakeholder Liaison Contact Info:**

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- TN – Lisa Booker | [lisa.l.booker@irs.gov](mailto:lisa.l.booker@irs.gov) | 615-250-5253 | eFax 855-221-4805
- VA – Cheryl Jackson | [cheryl.l.jackson@irs.gov](mailto:cheryl.l.jackson@irs.gov) | 804-916-8142
- NC - Robert Graham | [Robert.L.Graham@irs.gov](mailto:Robert.L.Graham@irs.gov) | 910-223-3515
- IA - Dan Belarmino | [danarnell.g.belarmino@irs.gov](mailto:danarnell.g.belarmino@irs.gov) | 312-292-2293 | fax 855-451-6914
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