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Tax Professionals Provide Insights on IRS Future State; Feedback Efforts Continue in 2017 as Online Account Shows Strong Early Use

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WASHINGTON — As part of ongoing efforts to receive feedback from the tax community and partner groups, the Internal Revenue Service today said tax professionals attending the Nationwide Tax Forums this year highlighted a number of areas to help the agency shape Future State efforts to improve taxpayer service.

“This year’s Tax Forums were an excellent opportunity to discuss the IRS Future State with tax professionals and get their perspectives,” said IRS Commissioner John Koskinen. “Our Future State work continues to evolve, and this type of feedback is important to help us with this ongoing effort.”

IRS Tax Forums were held in five cities in 2016 with more than 10,700 tax professionals attending.

The IRS has been developing a “Future State” plan that envisions the taxpayer experience over the next five years and beyond. The initiative is designed to improve the IRS’s ability to fulfill its mission in the years to come. The IRS wants to enhance and expand services for all taxpayers, to provide the services they need whether in-person or on-line. The goal is to make interactions with the IRS more timely and easier for taxpayers and tax professionals.

A central component of the plan is the creation of online taxpayer accounts as a new option through which taxpayers will be able to obtain information from and interact with the IRS.

The Future State does not contemplate replacing current methods of customer service, such as phone assistance; rather it envisions finding alternative ways for people to receive the specific services they need.

Elements of the evolving Future State were displayed at an exhibit at each Tax Forum in 2016. Thousands of forum attendees visited the exhibit.

In a survey, the IRS asked tax professionals what changes in the Future State could have the biggest impact on the experience taxpayers have with the IRS. More than 1,300 tax professionals responded to the question. More than 30 percent of respondents cited enhanced support and tools for taxpayers and overall more than 20 percent cited agile, efficient and effective operations as the areas of greatest impact.

Another question asked tax professionals how they saw the Future State affecting their work. Nearly half of more than 600 tax professional respondents noted they saw the Future State expanding their role as a service partner.

The IRS will be using these results as well as other feedback to help guide ongoing work as well as prepare for next year's Tax Forums. Throughout this year, the IRS has also been talking with a variety of groups across the agency's business divisions to get insight and feedback about various changes taking place at the IRS. In addition, the IRS will continue to solicit input from partner groups about Future State efforts to help ensure the future direction of IRS changes reflects the needs of taxpayers as well as the greater tax community.

Forums are three-day events that provide tax professionals with the most up-to-date information on federal and state tax issues presented by experts from the IRS and partner organizations through a variety of training seminars and workshops. The forums were held during July, August and September.

Online Account Shows Strong Early Use

As part of the Tax Forums this year, tax professionals received a demonstration of the online tax account application.

Last month, the IRS went from the demo to an actual launch of the online tax account application on IRS.gov, which provides information to taxpayers with straightforward balance-owed inquiries in a secure, easy and convenient way. This new "[Finding Out How Much You Owe](#)" feature, paired with existing IRS online payment options, increases taxpayer self-service options.

In nearly four weeks since the launch of the online account, taxpayers have checked their account balance over 76,000 times. And taxpayers have used this new offering to make more than 8,600 tax payments, worth over \$27.6 million, through the Direct Pay feature. Taxpayers have also completed more than 2,100 installment agreements through the Online Payment Agreement. In subsequent phases of the online account, the IRS will gradually add features, providing taxpayers with additional tax information and the ability to complete more tasks online.

"These expansions of our online services illustrate our Future State work. Part of our effort has been putting the infrastructure and technology in place to help make improved taxpayer service possible," Koskinen said. "It's important to keep in mind that the Future State is not a "big bang" initiative where everything is put in place all at once; rather the work on the new online account feature reflects our focus on careful, incremental steps to make sure each process works well. Feedback from the tax community is a critical part of that effort."

Koskinen also noted that IRS employees remain a critical part of the Future State effort – especially in providing in-person service to taxpayers as well as tax professionals.

"While technology and new service options are important parts of Future State, you can't overlook the continuing need to have in-person service available to taxpayers over the phone and in-person," Koskinen said. "Our hope is that expanded online options will provide help to taxpayers who prefer that option, while also freeing up valuable resources for people who need help over the phone or in-person."