



ELECTRONIC TAX ADMINISTRATION ADVISORY COMMITTEE

Electronic Tax Administration Advisory Committee (ETAAC) Virtual Public Meeting Wednesday, March 22, 2023 MINUTES

The Electronic Tax Administration Advisory Committee (ETAAC) held a virtual public meeting via conference call on March 22, 2023. The meeting was called to order by John Lipold, IRS Designated Federal Officer, at approximately 12:30 p.m. ET. Mr. Lipold welcomed the public and provided logistical information. He noted that the meeting was the third public meeting of the 2022-2023 ETAAC Committee. Mr. Lipold then introduced Jared Ballew, ETAAC Chairperson, to provide remarks on behalf of the Committee.

Mr. Ballew thanked the IRS for its support, including hosting the committee in person for the March meeting. He then offered a brief summary of the Committee's purpose. In particular, he noted that ETAAC's scope includes providing advice regarding the IRS's Identity Theft Tax Refund Fraud prevention efforts through the Security Summit. Mr. Ballew noted ETAAC is advisory, not oversight.

Mr. Ballew introduced this year's co-Vice Chairs, Timur Taluy, and Vernon Barnett. Mr. Taluy gave an overview of ETAAC's work this week. ETAAC members examined the most strategic areas facing tax administration and learned about what the IRS is doing in those areas. Currently, ETAAC is generating concepts, sharing information with the group, and writing recommendations in different subcommittees. This week ETAAC worked in subgroups and shared draft recommendations with the committee as a whole. The goal of the March meeting is to pull together research from the last 4-5 months into draft recommendations. Mr. Tulay turned the meeting over to Mr. Barnett

Mr. Barnett thanked the Committee, which includes practitioners, state tax representatives, and members of the private sector. He noted that ETAAC's diversity and depth of experience allow it to function in a way that is unique. Mr. Barnett thanked the IRS for their efforts in responding to committee inquiries with topics evaluated to date, and for future assistance as each of the sub-committees completes their recommendations.

Mr. Ballew next turned the meeting over to the three subgroup leads to provide a brief high-level overview of each subgroup's work. Mr. Ballew then Introduced the leader of the Information Reporting Subgroup, Hallie Parchman.

Ms. Parchman, our recommendations fall within the themes of modernization, transparency, enforcement, and fraud detection and prevention. The team has done a great job over the last few weeks drafting recommendations within these themes, which we presented yesterday to the wider team. The team was more or less aligned with our recommendations. The next steps for us are to finalize our section of the report and weave it into the larger ETAAC report to be presented at the end of June.

Mr. Ballew then Introduced the leader for the Filing an Income Tax Return A-Z Subgroup Andy Phillips

Mr. Phillips reported his team is looking at the tax ecosystem from the point that the taxpayer begins to prepare their documents to the point that correspondence and issues that come up during processing. This subgroup is looking at a variety of opportunities to enhance the ease and accuracy of filing. They are also looking for opportunities for more taxpayer transparency, specifically through self-service features, knowing what is going on and actions they need to take.

Mr. Ballew then introduced the Customer Journey: Business systems, modernization, and human capital subgroup led by Ms. Terri Steenblock

Mr. Ballew provided the report on behalf of Ms. Steenblock. This team is looking at what needs to happen to improve IRS systems and how human capital plays a role in these improvements. The team is also looking at the best ways to improve collaboration between stakeholders, and how dollars can be spent to achieve those goals.

Mr. Ballew then noted that ETAAC welcomes comments from the public, and opened the floor for comment by those on the call. Hearing no questions or comments, Mr. Ballew thanked the attendees and turned the meeting over to Mr. Lipold.

Mr. Lipold provided the email address for submission of comments to ETAAC: publicliaison@irs.gov and noted that ETAAC's prior reports and minutes can be found at [IRS.gov/ETAAC](https://irs.gov/ETAAC). Mr. Lipold thanked the attendees and concluded the meeting at approximately 12:45 p.m. ET.