



## ELECTRONIC TAX ADMINISTRATION ADVISORY COMMITTEE

Electronic Tax Administration Advisory Committee (ETAAC)  
Virtual Public Meeting  
Thursday, November 14, 2024  
MINUTES

John Lipold, the designated federal official for the Electronic Tax Administration Advisory Committee (ETAAC), welcomed attendees, explaining that the ETAAC is an advisory committee administered by the IRS under the Federal Advisory Committee Act, established by Congress and reporting to both Congress and the Commissioner of Internal Revenue. The purpose of the meeting was to provide public insight into the committee's decision-making processes, current issues, and recommendations. He requested that public members remain muted and then introduced Vernon Barnett, the chair.

Vernon Barnett, ETAAC chair and Alabama Revenue Commissioner, thanked John and introduced himself. He highlighted the diverse backgrounds of the ETAAC members and their collaborative approach to identifying areas of success and potential improvement within the IRS and the tax ecosystem. He mentioned that the committee was in the early stages of formulating its report, anticipating its completion and publication the following year. He then introduced the vice-chair, Amy Miller, and the co-chairs of the subgroups: Argi O'Leary, Carol Lew, and Mark Steber. He explained that each subgroup is focusing on specific issues within the tax system.

Chairman Barnett then introduced Amy Miller, CPA tax practitioner at ADP, who explained that the ETAAC committee's report addresses both the IRS and Congress, requiring consideration of what's appropriate for each.

Chairman Barnett then introduces the three subcommittee chairs. He explains that Mark Steber's group, focusing on tax practitioner issues, is unable to present due to his absence. He promises to share more details from this group at future public meetings.

Carol Lew's group is examining various issues. Their current focus includes: IRS budget and efficient tax administration to save money and improve taxpayer service; guidelines for simplifying tax administration, particularly concerning new legislation; capital investment for efficiency and cost savings; automatic extensions of tax deadlines; issues for joint return filers who later file separately, including easier IRS payments; and simplifying the use of business accounts (where W2s are filed).

Lew discussed the need for taxpayers, especially those with complex returns, to access online accounts showing images of their filed tax returns in addition to transcripts. This would be particularly helpful for tax practitioners. She then passes the discussion to the next subcommittee leader.

Argi O'Leary, a principal with Ryan tax consulting firm and former New York state tax administrator, introduces the subcommittee focused on recommendations impacting state and government agencies. The subcommittee plans to highlight the IRA funding's potential to modernize IRS systems, emphasizing the importance of efficient and timely data sharing with states. Key areas of focus include master file modernization (IMS, individual and business master files), artificial intelligence implementation, and

identity verification processes (mentioning ID.me as a positive example but noting inconsistencies across IRS systems). The subcommittee also stresses the need for consistent funding for both technology and taxpayer services, noting that IRS service failures lead to increased calls to state agencies.

Chairman Barnett thanked the subcommittee chairs and discussed the ETAAC's ambitious schedule for producing a draft report by early January, aiming for early engagement with the IRS and congressional staff. He highlights the ETAAC's advisory role to both entities and expresses concern about IRS funding and ongoing modernization efforts. Chairman Barnett emphasizes the importance of continued support for the IRS modernization plan, citing its benefits for states, taxpayers, and the entire tax ecosystem. He notes the increased collaboration between the IRS, states, and the private sector, acknowledging disagreements but emphasizing the shared goal of serving taxpayers. ETAAC is aligned on ensuring a secure and efficient tax system that protects taxpayer data.

The meeting is then adjourned by John Lipold.

The next public meeting of the ETAQ will be held on Wednesday, January 8th. Meeting details will be published in the Federal Register and on the committee's website, [www.irs.gov/ETAAC](http://www.irs.gov/ETAAC).