



IRS Nationwide  
**TaxForum**

| 2017

## **IRS Future State**

**Working with You to Transform  
Vision into Action**



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**Tax Forum**

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# Tax pros, trusted partners



**More than 80 percent** of American households use a tax preparer or tax software to help them prepare and file their taxes. <sup>1</sup>

**An estimated 6 in 10 people** say tax professionals are very valuable sources for getting tax advice or information. <sup>2</sup>

- 1) Based on IRS estimates.
- 2) Comprehensive Taxpayer Attitude Survey (CTAS) 2016

Opening





# Key takeaways



Cite factors that influence the pace of progress



Identify IRS advisory groups and outreach resources for partners



Name an IRS Pub with tips for safeguarding tax data for tax pros



Cite free IRS resources you can use in your tax client communications



Describe online tools available now



Visit us in the exhibit hall to see design prototypes

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# List of topics

Future state themes, trends and feedback

Improving ways to connect with IRS

- ✓ Correspondence
- ✓ Taxpayer Assistance Centers
- ✓ Telephone assistance
- ✓ Collection
- ✓ Appeals
- ✓ Online tools

Education and outreach

Opening





# Future state themes



Empower you with secure tools, support



Quality train and equip the IRS workforce



Protect the tax system and taxpayer rights



Use data to better inform decision-making



Collaborate with our trusted partners



Make IRS operations more agile and effective



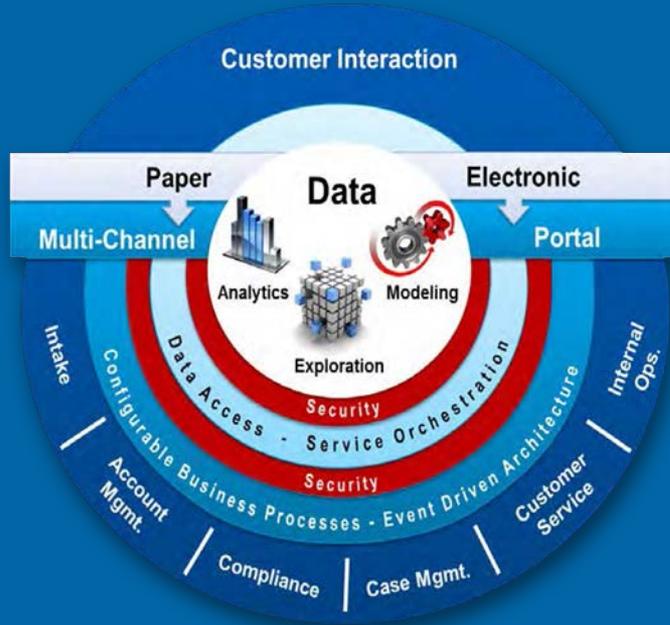
Change





# IT roadmap to support future state

Designed to support multi-channel electronic and paper interactions



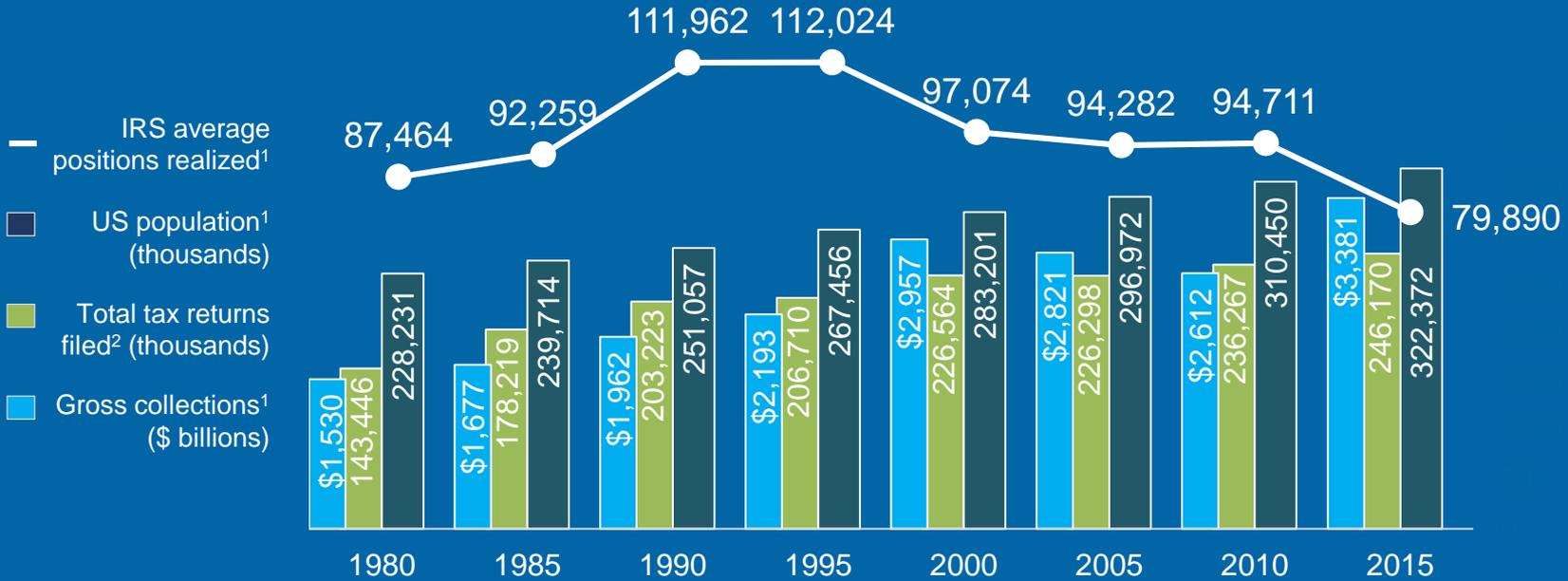
- Unmet demand
- Aging infrastructure
- Cybersecurity
- People (retention, hiring, skills training)





# Tax administration over time

## Trends in return filing, population growth and gross tax collections



1) IRS Data Book Table 29. Collections, Costs, Personnel, and U.S. Population; Collections adjusted for inflation to 2017 dollars using BLS CPI inflation index.  
 2) Publication 6186 (Rev. 12-2016) CY Return Projections for the U.S. and IRS Campuses



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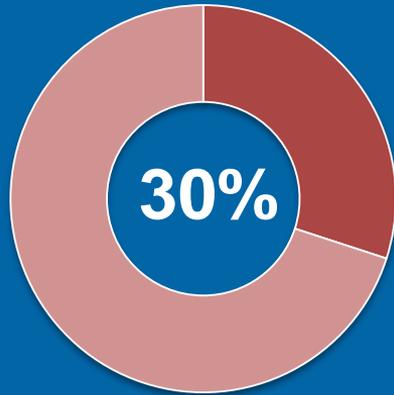




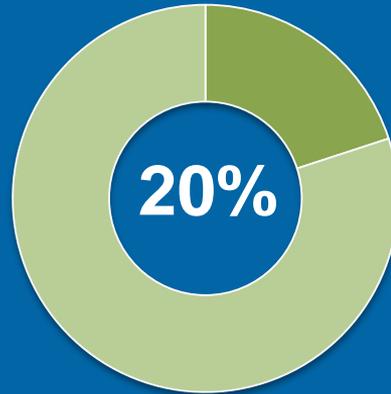
# Feedback from tax pros

Tax professionals highlighted areas to help improve taxpayer service

## Taxpayer Experience



Say enhance support and tools for taxpayers



Say more agile, efficient and effective operations

## Practitioner Role



Say future state expands my role as a service partner

1) IRS Future State Initiative Survey Final Results, June 2016



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# Improving ways to connect

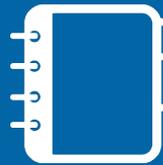
Save time, reduce burden, help our employees better assist



Correspondence



Telephone



Appointment



Online



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# Correspondence

Ongoing redesigns and updates on a frequently changing inventory

1,600+  
types of correspondence

200+  
million notices and  
letters sent a year

- Carry out new programs and laws
- Provide info about account activity
- Make the information more clear
- Promote compliance



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# Correspondence

One of several data-driven “treatment streams” to promote compliance

Page 1 of 2

**⚠ Please take action on your balance of \$4,134.38 by 11/22/2016.**

- We are trying to collect unpaid balances from you for the tax periods shown on the next page.
- You may be subject to enforcement action, which may include seizing assets or wages.
- Choosing one of the options below **may stop** enforcement action on your account:

### Pay your balance over time

Set up a streamlined installment agreement with a monthly payment as low as:

**\$57.42** (over approximately 72 months)

- Applicable penalties and interest will continue to accrue on your balance over the life of the agreement. See next page for details.
- Larger monthly payments will decrease the time until you pay off your balance, reducing penalty and interest charges
- You must stay current with your payments and future filings to avoid enforcement action
- Find out about other options for paying your balance over time at [irs.gov/installmentagreements](http://irs.gov/installmentagreements)

[Visit irs.gov/OPA](http://irs.gov/OPA)

### Pay your balance in full

Make a one-time payment of:

**\$4,134.38**

- Paying your balance in full, if you can afford it, is your best option because:
  - It will stop all enforcement action on your account
  - Penalty and interest will stop accruing
- If you can't pay your full balance, pay what you can to avoid as much penalties and interest as possible

[Visit irs.gov/payments](http://irs.gov/payments)

Learn more and avoid waiting on the phone by visiting [irs.gov/LT16D](http://irs.gov/LT16D). If you can't find what you need online, you can call the IRS at 1-800-829-3903. If you believe there is an error in this notice, and cannot resolve the disagreement with us, you may have the right to appeal. Visit [irs.gov/appeals](http://irs.gov/appeals) to learn more.

[Continued on back](#) ➡

- Showing the option to pay smaller increments over time
- Bringing important details to the forefront
- Reducing the number of steps



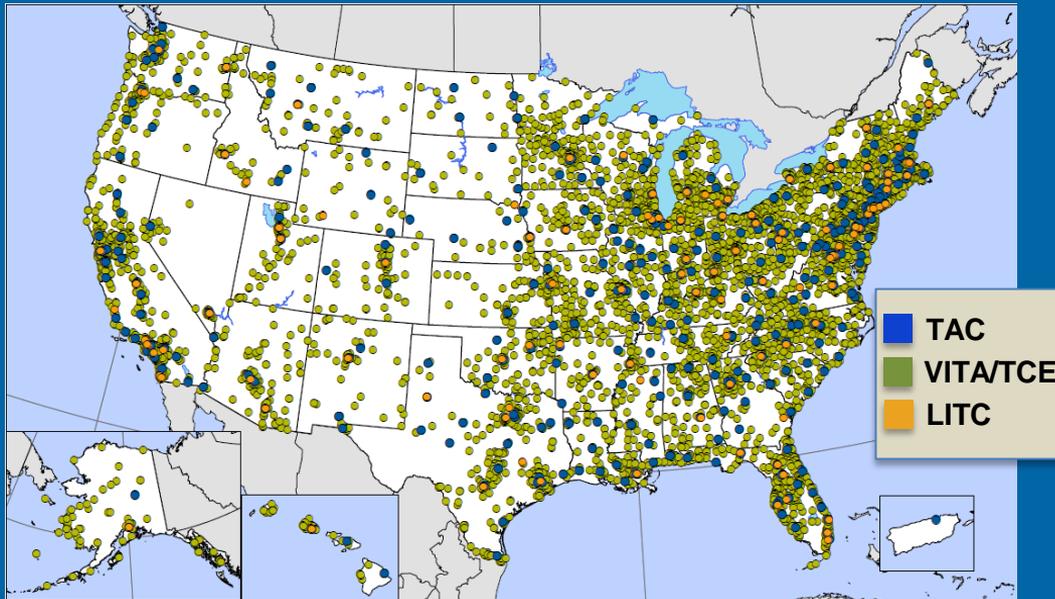
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# Taxpayer Assistance Centers

Broad coverage, now offering service by appointment



- Appointments
- Self-service kiosks
- Better signage
- Virtual assistance

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# Telephone assistance

Improving the Practitioner Priority Service



81%

approximate level of service  
FY 2017 to date

> 1 million

assistor calls answered

- Year-over-year increase to level of service and speed of answer
- Speech analytics technology used to evaluate recorded audio



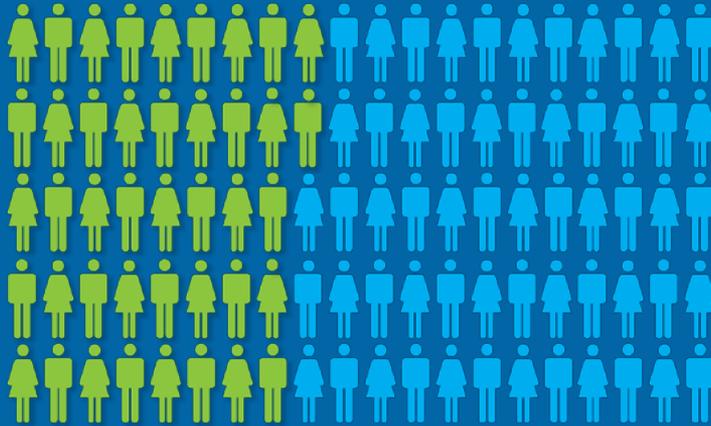
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# Collection

Revitalizing collection operations, testing proactive and systemic alerts



The number of IRS revenue officers has declined by about 42% over the last five years

- Embracing complex work, digital case inventory solutions
- Re-establishing a culture of subject matter experts, managers coaching and mentoring
- Testing solutions that promote compliance through service: Federal Tax Deposit Alert System



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# Appeals

Secure virtual communications, fair and impartial processes



- Exploring the use of secure virtual technology for taxpayer conferences
- Tax professionals and their clients encouraged to participate



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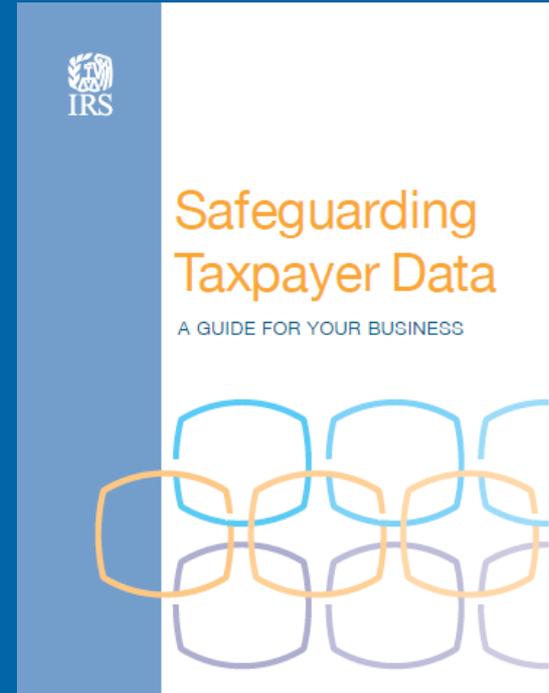
# Data security for tax pros

“Protect Your Clients, Protect Yourself”



## Pub 4557

- Information on setting up safeguards and reporting incidents
- Links to applicable standards and best practices



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# Online account for tax pros

Design prototype in the exhibit hall for research and demonstration

Welcome, USER | Personal Account | Logout

DESIGN RESEARCH DRAFT

Welcome to your Tax Professional Account!

**ADD A CLIENT** **VERIFY YOUR CAF**

For Example: Power of Attorney, Tax Information Authorization and Reporting Agent Authorization. Verify a current CAF number to see your clients in Tax Pro.

**Recent Updates** Last account activity: 11 minutes ago

Client	Last Activity	Date
Brown, Judy	Received Secure Message	04/04/17 12:05 PM
Jones, Kyle	POA Pending	02/02/17 3:37 PM
Davis, Sanjay	TIA Approved	01/01/17 8:34 AM

**Recent Secure Communications** Last account activity: 11 minutes ago

From	To	Subject	Tax Year	Client	Date
IRS	Davis, S.	Re: CP06 - Tax Credit...	2015	Davis, S.	4/12/17 12:00 PM
IRS	Jones, K.	CP11 - Balance Due	2016	Jones, K.	4/11/17 5:00 PM

**Upcoming Deadlines**

- Renew your PTIN in 20 days
- Judy Brown: Unable to process payment

**Activity History**

- 3/28/17 4:54 PM Received Secure Message
- 1/15/16 7:53 AM TIA Approved
- 1/5/16 2:44 PM POA Approved
- 1/5/16 3:15 PM Downloaded Transcript

- Multi-year effort
- User experience testing explores opportunities and challenges
- Envisions a secure system for managing authorizations

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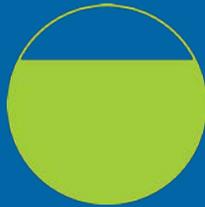


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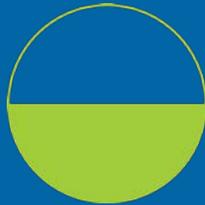
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# Online services and tools

Browse the complete list of tax tools available for individual taxpayers, businesses, and tax professionals on IRS.gov



Return filing, tax refund tracking, forms and publications, tax law help



Tax payments, tax transcripts, online accounts



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# Online account for taxpayers

Iterative development means adding features at a more rapid pace

An official website of the United States Government

**IRS** Welcome, USER | Profile | Logout

As of March 20, 2017, you owe:  
**\$1,438.00**

The information provided is based on our current data. The numbers here may not reflect:

- Recently filed or processing returns
- Recent payments or adjustments
- Information on your business account
- Installment agreement user fees

Penalties and interest continue to accrue until tax is paid in full.

**Payment Options**

[PAY BY BANK ACCOUNT](#)

[PAY BY CARD](#)

Fees apply when paying by card.

[NEED MORE TIME TO PAY?](#)

**Overview by Tax Year**

Tax Year	You Owe
2015	\$1,054.74 >
2014	\$210.59 >
2013	\$172.67 >
2012	\$0

**Recent Payments** (within 18 months)  
Payments may take 2 days (electronic) to 3 weeks (mail) to be listed.

Tax Year/Type	Amount/Date
2015 Payment	\$875.00 May 23, 2016
2015 Shared Responsibility Payment (Health Care)	\$695.00 May 20, 2016
2015 Estimated Tax Payment	\$1,300.00 Jan 15, 2016

[+ Show all payments](#)

**Tax Records**  
Key information from your current tax return as originally filed.

2016	
Form Filed:	1040
Filing Status:	Single
Total Exemptions Claimed:	1
Adjusted Gross Income:	\$38,000.00

View, print or download your tax records using the button below.

[GET TAX RECORDS ONLINE](#)

Give Feedback | Privacy Policy | Accessibility

- Check amount you owe
- View your payment history
- Make a tax payment
- View your tax records

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# Digital communications

Secure online portal for authenticated users only, with plans to expand

The screenshot shows an advertisement for IRS Secure Messaging. At the top, it says "Secure Messaging" with the IRS logo and the tagline "A new way to connect with the IRS". Below this, a question asks "Wish there were a faster way to resolve your tax account matters?". The text explains that the IRS now has an easier method of communicating with taxpayers through Secure Messaging, allowing for the sending and receiving of messages and digital documents related to IRS audits. At the bottom, a call to action says "Visit [irs.gov](https://www.irs.gov) to register and get started."

- Receive digital notices instead of paper
- Transfer digital documents to and from the IRS
- Future releases may include: live text chat, voice chat, video chat, and co-browsing



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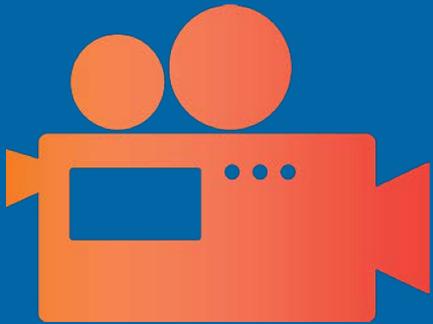


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# Digital communications recap

Promote compliance, customer satisfaction, and workforce efficiencies

**Secure Messaging**  
A new way to connect with the IRS

**Wish there were a faster way to resolve your tax account matters?**

The IRS now has an easier method of communicating with taxpayers — IRS Secure Messaging. With this service, you (and your authorized representative, if applicable) will be able to send and receive messages and digital documents related to your IRS audit quickly and easily.

Visit [irs.gov](https://irs.gov) to register and get started.

- Invitation-only trial period
- To participate, a power of attorney's client must opt-in
- Focused now on encouraging participation and tracking early results





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# Education and outreach

Public forums and advisory groups to discuss tax administration issues



IRS Advisory Councils: open meetings, annual reports, public involvement



IRS Partnership Efforts: resources, meetings and workshops for tax pros on IRS.gov



National Taxpayer Advocate: Public forums, annual conferences, LITC program



Outreach





# Education and outreach

Unlocking the content of IRS guidance, forms and publications

TAX PRODUCTS  
IRS TAX MAP 2016

Tax Map Search:  GO

Search Help  
Navigation Help

Tax Map Index  
A B C D E F G H I  
J K L M N O P Q R  
S T U V W X Y Z #

International  
Tax Topic Index

Affordable Care Act  
Tax Topic Index

Exempt Organization  
Tax Topic Index

## IRS Tax Map

For Tax Year 2016

Tax Map Archives 2015 | 2014 | 2013 | 2012

### Topic Search

Enter one or two words for best results.  
Use dashes in Form numbers (e.g. W-2, not W2).

GO

#### Most Searched Topics

1040	W-2	8962	1040 Schedule A
1099	941	8949	1040 Schedule D
1099-MISC	4562	1041	1040X (Amended Return)

Tax Table	Refund	Extension
Mailing Addresses	IRA	Transcript
Earned Income Credit	HSA	Standard Deduction
Social Security Benefits	AGI	Sale of Home

- Electronic Reading Room
- Multiple formats and options for ordering
- IRS Tax Map of more than 5,000 tax topics, with links to all published info



Outreach





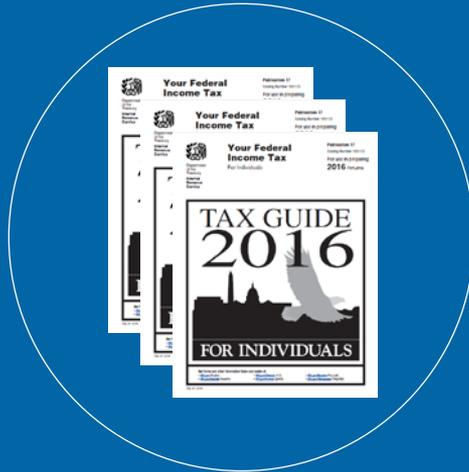
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# Education and outreach

Now offering 100 tax form instructions and IRS publications as eBooks



- Easier to navigate
- Easier to adjust print size
- Add comments / bookmarks
- Access for visually impaired



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# Education and outreach

Free resources for you and your client communication products

e-News for Tax Pros

weekly news roundup,  
one of the best ways to  
stay in-the-know

@IRStaxpros on Twitter

updates, alerts and links to  
resources for tax  
professionals

“Tax Tips” Program

easy-to-read tips on tax  
laws, data security and  
other issues

IRS Newswire

average of 2-3 news  
releases per week delivered  
to your inbox



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IRS.Future.State@irs.gov



- We want your feedback on how you interact with the IRS and on all range of issues you manage as tax professionals.
- Please use this mailbox to provide feedback on the future state. Although we cannot respond to each comment, we appreciate your feedback and will consider all comments submitted.
- **Caution:** We cannot respond to tax-related questions submitted to this mailbox.



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Visit the “IRS Future  
Digital Services” booth  
in the exhibit hall

