



MINUTES

Internal Revenue Service Advisory Council Public Meeting

April 27, 2022, 3 p.m. ET

The meeting was opened by John Lipold, IRSAC Designated Federal Officer, Tax Pro Partnerships and Advisory Groups Branch Chief, IRS Office of National Public Liaison, who provided housekeeping information regarding the call.

Ms. Carol Lew, IRSAC Chair, welcomed the public to the Internal Revenue Service Advisory Council's ("IRSAC") public meeting.

Ms. Lew outlined the agenda for the meeting, described the history and purpose of the IRSAC, and introduced IRSAC's leadership team. She noted that the committee is structured to include five subgroups: Large Business and International ("LB&I"), Small Business and Self-Employed ("SB/SE"), Tax Exempt and Government Entities ("TE/GE"), Wage and Investment ("W&I"), and Information Reporting.

Ms. Lew noted that IRSAC will hold additional public meetings this year and that IRSAC's annual public report will be published at its November 2022 public meeting. Ms. Lew then facilitated an overview of the following topics.

General Report Topics

1. Taxpayer Services: Focus and Funding

Large Business & International Report Topics

Joe Novak, LB&I Subgroup Chair

1. Information Reporting Penalty Reasonable Cause Consideration
2. Late Receipt of Schedules K-1
3. Certificates of US Tax Residency - IRS Forms 8802 and 6166

Small Business and Self-Employed Report Topics

Bob Panoff, SB/SE Subgroup Chair

1. Examination Customer Coordination and Innovation Office (ECCIO)

Tax Exempt and Government Entities Report Topics

Nancy Ruoff, TE/GE Subgroup Chair

1. Recommendations for Effective State Engagement to Promote Tax Compliance
2. Employee Plans Examination Compliance Approaches
3. Employee Plans Group Trust Rules
4. Tax Exempt Organization Search (TEOS) Tool Improvements
5. Potential Redesign of Forms 8038, 8038-G, and 8038-GC in connection with eFiling these returns

Wage and Investment Report Topics

Phil Poirier, W&I Subgroup Chair

1. Artificial Intelligence BOTS for Customer Service
2. Tax Pro Account Online Features
3. Business Master File (BMF) Transcript Delivery Service (TDS)

The Information Reporting Subgroup declined to raise any topics for formal consideration at this time.

None opposed any of the proposed preliminary statements or topics, and Ms. Lew indicated that IRSAC would proceed with including all of the report topics raised today in the IRSAC's annual report.

Ms. Lew thanked attendees for participating and thanked the IRS for the support that has been provided as IRSAC does its work. Ms. Lew turned the meeting back to Mr. Lipold.

There were no members of the public who requested to speak.

There being no further business to come before the committee, Mr. Lipold ended the meeting at 3:23 p.m. ET.

IRSAC Public Meeting Attendees – April 27, 2022

IRSAC

Carol Lew, IRSAC Chair
Martin Armstrong, IRSAC Vice Chair
Ted Afield
Amanda Aguillard
Sharon Brown
Jeremiah Coder
Alison Flores
Robert Howren
Denise Jackson
Jodi Kessler
Steve Klitzner
Kathleen Lach
Kelly Myers
Joseph Novak
Robert Panoff
Charles Parr
Luis Parra
Phil Poirier
Seth Poloner
Jeffrey Porter
Dawn Rhea
Nancy Ruoff
Jon Schausten
Tara Sciscoe
Paul Sterbenz
Katie Sunderland
Rebecca Thompson
Kathryn Tracy
Kevin Valuet
Sean Wang
Katrina Welch

IRS

John Lipold, IRSAC DFO
Ramona Bailey
Tanya Barbosa
Johnnie Beale
Anna Brown
Stephanie Burch
Justin Curtis
Luis Garcia
Gail Johson
Michael Odom
Nancy Rose
Maria Salazar
Brian Ward
Victoria White

Public attendees

Rayna Alexander
Jonathan Curry

Deborah Fox
James Kirslis
Tabitha Relota
Kara Segal
Kim Siegel