



MINUTES

Internal Revenue Service Advisory Council Public Meeting

July 13, 2022, 3 p.m. ET

The meeting was opened by John Lipold, Designated Federal Officer, Branch Chief, Communications and Liaison, 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 work session briefing.

Ms. Lew outlined the agenda for the meeting, described the history and purpose of 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 work session briefings this year in September, and that IRSAC's annual public meeting will be held on November 16, 2022. Ms. Lew then facilitated an overview of the following topics that were voted for inclusion in the November report:

General Report Topics

1. IRS Modernization 2.0

Information Reporting Report

Wendy Walker, Information Reporting Chair

1. Guidance on Wage Reporting for Payments to Incarcerated Individuals
2. Enabling Business Online Accounts and Electronic Communications and Transactions
3. Section 1446(f) and Publicly Traded Partnerships - Withholding Tax Issues
4. Recommendations for Use of Substitute Versions of Forms W-4R and W-4P

Small Business and Self-Employed Report Topics

Bob Panoff, SB/SE Subgroup Chair

1. Improving the Taxpayer Experience in Docketed Cases in Appeals' Jurisdiction – Correspondence Exams or Automated Underreporter Functions

Tax Exempt and Government Entities Report Topics

Nancy Ruoff, TE/GE Subgroup Chair

1. Employee Plans Examinations Compliance Approaches

The IRSAC also voted to include proposed recommendations in the November report, as discussed in the meeting, with respect to the General Report Modernization 2.0 topic, and with respect to the following TE/GE topics:

1. Employee Plans Examinations Compliance Approaches
2. Series 8038 Forms Redesign and Updates
3. Employee Plans Group Trust Rules
4. Tax Exempt Organization Search (TEOS) Tool Improvements
5. Recommendations for effective state engagement to promote employment tax compliance

The Large Business and International Subgroup and Wage and Investment Subgroup declined to raise any topics for formal consideration at this time.

Ms. Lew thanked attendees for participating and thanked the IRS for the support that has been provided as IRSAC does its work. Mrs. 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 3:28p.m. ET.

IRSAC Public Meeting Attendees – July 13, 2022

IRSAC

Carol Lew, IRSAC Chair
Martin Armstrong, IRSAC Vice Chair
Ted Afield
Amanda Aguillard
Sharon Brown
Jeremiah Coder
Sam Cohen
Alison Flores
Robert Howren
Denise Jackson
Michael Kam
Jodi Kessler
Mason Klinck
Steve Klitzner
Kathleen Lach
Kelly Myers
Joe Novak
Robert Panoff

Charles Parr
Luis Parra
Phillip Poitier, Jr.
Seth Poloner
Jeffrey Porter
Dawn Rhea
Nancy Ruoff
Jon Schausten
Tara Sciscoe
Paul Sterbenz
Katie Sunderland
Rebecca Thompson
Kathryn Tracy
Kevin Valuet
Wendy Walker
Sean Wang
Katrina Welch

IRS

John Lipold, IRS National Public Liaison
Tanya Barbosa
Anna Brown
Stephanie Burch
Maria Jaramillo
Darla Vanderwall
Brian Ward
Victoria White

Public attendees

Rayna Alexander, American Payroll Association
Eric Blackledge, Blackledge Furniture
Jonathan Curry, Tax Analysts
Deborah Fox, ComplyRight, Inc.
Mary Kallewaard, Cokala Tax Group
Phyllis Jo Kubey, NY State Society of Enrolled Agents
Jyme Mariani, American Payroll Association
Celia Lau, Navolio & Tallman LLP