

John McGown

From: Lam Alexa W <Alexa.W.Lam@irs.gov>
Sent: Monday, August 14, 2023 8:02 AM
To: jhinton@uidaho.edu; John McGown; chrism@cmd-law.com; Gwynne Lethcoe; taxhelpid5@earthlink.net; David W. Hockman; cweddle@paramount.tax; Ellen Mitchell; Robert Wunderle
Cc: Beeman Donna L; Baltadonis Dawn Marie D; Opheikens Mindy L
Subject: ID PLM Summary for 8/10th
Attachments: ID PLM Summary for 8-10-23.docx

* NOTICE: EXTERNAL EMAIL *

Good Monday Everyone,

We finished a successful PLM on 8/10/23. I am sharing a short summary, attached.

Thanks a million to Heather, Dawn, and Mindy for making time to be with us. And Thank you so much to the few that attended. Your contribution and discussion made the meeting enjoyable.

I'll be in touch for next meeting.

Sincerley, Lexa Lam
Senior Stakeholder Liaison
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What to Do If You Suffer a ['Data Breach or Other Security Incident'](#)

From: Lam Alexa W <Alexa.W.Lam@irs.gov>
Sent: Monday, July 17, 2023 3:25 PM
To: jhinton@uidaho.edu; jmcgown@hawleytroxell.com; chrism@cmd-law.com; Gwynne Lethcoe <Gwynne@idcpa.org>; taxhelpid5@earthlink.net; David W. Hockman <DWHockman@msn.com>; cweddle@paramount.tax; Ellen Mitchell <elleng@columbiataxeservices.com>
Cc: Beeman Donna L <Donna.L.Beeman@irs.gov>; Lam Alexa W <Alexa.W.Lam@irs.gov>
Subject: ID PLM Meeting Summary - Agenda

Hi Everyone,

Please see attached pdf agenda. Let me know if you have other suggestions for the agenda.

Meanwhile, if you have questions from your chapter/members that I can share with our presenter before the meeting, please send to me.

Best Always, Lexa Lam
Senior Stakeholder Liaison
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Oakland, CA; Tel: 510.907.5063

From: Lam Alexa W <Alexa.W.Lam@irs.gov>
Sent: Wednesday, June 14, 2023 1:28 PM
To: jhinton@uidaho.edu; miri.gillihan@gmail.com; ellen.iatc@gmail.com; jmcgown@hawleytroxell.com; chrism@cmd-law.com; Gwynne Lethcoe <Gwynne@idcpa.org>; taxhelpid5@earthlink.net; David W. Hockman <DWHockman@msn.com>; cweddle@paramount.tax
Cc: Lam Alexa W <Alexa.W.Lam@irs.gov>; Beeman Donna L <Donna.L.Beeman@irs.gov>
Subject: ID PLM Meeting Summary - 6/14/23

Hi Everyone,

Due to technology issues with can't join and no audio, we start the meeting about 15 minutes after the hour. But we still made the meeting work. Although, I skipped the ice breaker part. Thank you for your attendance and participation today. The attached is the summary.

I will keep everyone inform as the planning progress toward 8/10th.

Best,

Kind Regards, Lexa Lam
Senior Stakeholder Liaison
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What to Do If You Suffer a ['Data Breach or Other Security Incident'](#)

ID Practitioner Liaison Meeting Summary – August 10, 2023

Attendance:

John McGown

John Hinton

Bob Wunderle

David Hockman

Gwynne Lethcoe

IRS - Lexa Lam and Heather Yocum

TAS - Dawn Baltadonis and Mindy Opheikens

Exam Field and Campus Policy

Heather spoke about the Digital Upload Tool (DUT) and Taxpayer Digital Communication (TDC). Taxpayers receiving one of nine notices can respond securely to IRS online. It is a secure platform. Taxpayers must enroll and authenticate identity. Visit, [Communicate Securely with the IRS Online](#). Fact Sheet 2023-05, [IRS expands secure digital correspondence for taxpayers](#) and [Taxpayers can now upload more documents to IRS; new online option for 9 notices can help resolve issues faster](#). There is a Chatbot on [Understanding Your CP2000 Notice](#). It is for self-help 24/7. Field exam also allow electronic transmission of documents but with password via encrypted email. Visit, [Email Encryption Procedures Using the WinZip Utility](#). Also, [Sign and Send Documents Electronically](#).

There are lots of information about gig economy. The pub 5369-A, Gig economy and your taxes. And visit, [Gig Economy Tax Center](#).

Taxpayer Advocate Service

Mindy is acting local TAS for Idaho and Dawn for Oregon. Dawn spoke about TAS receiving cases in Form 941s, Employee Retention Credit, and Tax Exempt status rejects. Her talks included Taxpayers' rights. The timeline for case response at 10/30/45/60 days. There's technical advisor to help with complex issues. Idaho office has one case worker, two hired and being train, one will hire from external. TAS also has Digital Upload Tool. The tool is expanding. But not all offices using this tool yet. If taxpayers have tax problems because of financial difficulties or immediate threat of adverse action and haven't been able to resolve them with the IRS, the [Taxpayer Advocate Service \(TAS\)](#) may be able to help.

Dawn provided contact information in the attached slide.



TAS contact info for
6 states 8.2023.pptx

Questions and comments during meeting.

After submitting a response to a notice, is there a way to get confirmation, so we know it's been received?

Answer: This feature has much demand and is on IRS to-do list.

Is there specific focus for all of IRS hiring? Answer: IRS hiring and onboarding the new hires at different time during the year, and we are not aware of any specific focus.

John H. operates a recently opened Low Income Tax Clinic in Boise. There's not a whole lot of cases.

Bob W. operates the La Posada Tax Clinic in Twin Falls. He is still looking to hire an in-person attorney. His low income clinic handles refugee cases, the H-2A visa (publication 519) as they work in the dairy industry and are un-documented people.

Bob W. sent a case about the H-2A workers to TAS Systemic Advocacy Management System or SAMS. This issue involves employers not withholding tax on workers' wage. It also affects first time filers with no Individual Master File (IMF) tax account.

Bob W. referred a case to the Return Preparer Office (RPO) and provided 52 page documents. Bob is voicing why RPO would not share any information concerning this case. In this instance, the Taxpayer Bill of Rights include the Right to Confidentiality, which states in part, any information they provide to the IRS will not be disclosed unless authorized by the taxpayer or by law. Taxpayer Bill of Rights

Next meeting: To be determine.

Taxpayer Advocate Service Contacts



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Taxpayer Advocate Service Contacts

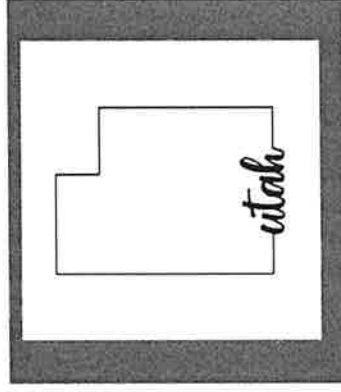


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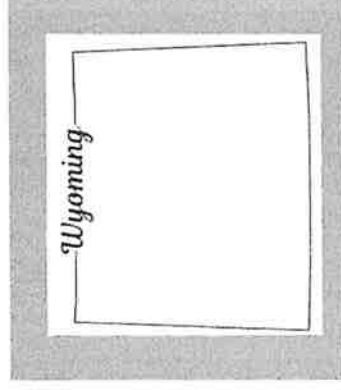


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