

# TAS Hot Tax-related Topics



YOUR VOICE AT THE IRS



Information is current as of  
October 2021

<https://www.taxpayeradvocate.irs.gov/>

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## Working with the Taxpayer Advocate Service

Tax Professionals



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## What to Expect

- TAS will advocate with you on your client's behalf = ***Your Voice at the IRS.***
- Case assigned to *one* Advocate for the duration of the case.
- Contact within *seven days* (or less) from the date you contacted us or the date your inquiry was referred to us.
- Given an estimated expected completion date.



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## What to Expect

- In most instances, the Taxpayer Advocate Service must rely on the IRS to take the action needed to resolve the issue.
- Our role is to ensure that actions are completed accurately and expeditiously and that the taxpayer's rights have been protected.



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## What to Expect

- We may require documentation or additional information to resolve the inquiry. If so, we will request it when we call.
- Your prompt reply will ensure we can continue to advocate for you and your client.
- If we are continuously unable to reach you by phone or by letter, our office may be required to contact the taxpayer directly or possibly close the case.



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## What to Expect

- Documentation
  - Power of Attorney form, if it is not already processed by the IRS and showing as filed.
  - Copies of any IRS notices or letters your client has received.
  - Completed and signed forms
    - Be sure to obtain the taxpayer's signature if a tax return or other form is needed to resolve the issue.



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## What to Expect

- Case Advocates are responsible for keeping you informed of their progress throughout the case.
- You will also be provided with a clear, complete, and correct explanation of what was done to resolve the problem when we are done.



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## Phone Numbers and Voicemail

- It is important that we have a good phone number on the account or on your Power of Attorney (Form 2848).
- TAS cannot leave tax information on a representative's answering machine or voicemail, even if the representative asks them to do so.
- Identification verification is required – for everyone.



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## How to contact TAS

- Call the NTA Case Intake Line: [1-877-777-4778](tel:1-877-777-4778)
- Download Form 911, *Request for Taxpayer Advocate Service Assistance*, from [irs.gov](https://www.irs.gov)
- Your local advocate's number is in your local directory and at: [www.taxpayeradvocate.irs.gov/contact-us](https://www.taxpayeradvocate.irs.gov/contact-us)
- Fax or phone the Local Taxpayer Advocates listed in Publication 1546, *Your Voice at the IRS*



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## Try Our New Tool

Get Help ▾ Resources for Taxpayers ▾ Tax News & Information ▾ Our Reports to Congress ▾ Contact Us ▾

### Can TAS help me with my tax issue?

If you are having tax problems and have not been able to resolve them with the IRS, the Taxpayer Advocate Service (TAS) may be able to help you. Please answer just a few brief questions to determine if TAS can help you with your tax issue. Generally, we help taxpayers whose tax issues fall into one of these main categories. Select the topic below to learn more:

- [Financial Hardship](#)
- [IRS System Issue](#)
- [Fair & Equitable Treatment](#)
- [Public Policy](#)



<https://www.taxpayeradvocate.irs.gov/can-tas-help-me-with-my-tax-issue/>



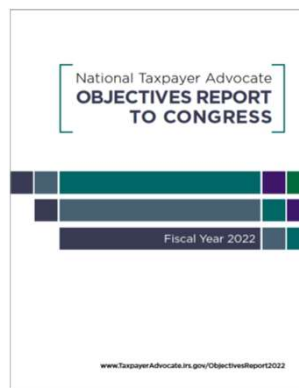
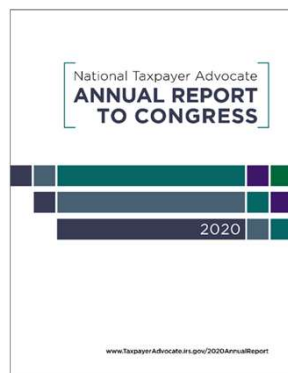
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# TAS Reports, Filing Season Review, & Customer Service Information



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## TAS Reports To Congress



<https://www.TaxpayerAdvocate.irs.gov/reports>



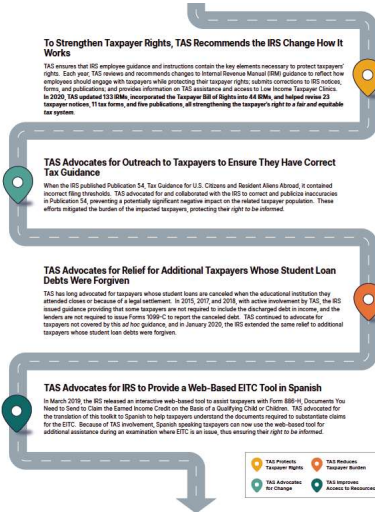
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# 2020 Annual Report to Congress

- Inadequate telephone and in-person taxpayer service
- Limited online records access
- Inadequate digital communication options
- Limitations on electronic filing of certain tax forms



# New Journey of Advocacy Section



## FY22 Objectives Report

### 2021 Filing Season Review

- Certain filing and payment deadlines postponed to May 15, 2021

*The disruption caused by COVID-19 and the postponed due date has had – and continues to have – an enormous impact.*

- Impact on filing season:
  - Number of unprocessed returns / refunds
  - Volume of correspondence from taxpayers
  - Reduction in toll-free service
  - IRS Notice Delays



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## NTA Blog: TAS Facing Similar Challenges as the IRS

*“TAS understands the frustrations and hardships caused by these unprecedented circumstances. Please be patient if you learn your case is not yet processed or be understanding as to why TAS cannot accept your case at this time. Our case advocates are working hard on your behalf.”*

There are three principal causes of TAS’s delays in providing prompt taxpayer service:

- Dramatic increase in our workloads.
- Our inflation-adjusted budget (and therefore our staffing levels) has declined.
- The difficulty the IRS’s business units face in handling our cases has increased the average time our case advocates must spend on each case.

*“TAS relies on the same IRS employees as taxpayers to fix most TAS taxpayer problems for us.”*



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## TAS's FY22 Business Objectives

- TAS will expand its use of digital communications to interact with taxpayers, tax professionals, and congressional offices.
- Identify TAS case processing efficiencies.
- Evaluate the possible expansion of TAS's delegated authorities.
- Expand outreach and promote faster resolution of taxpayer issues.
- Explore new IRS and TAS hiring opportunities and modernize and expand new hire training.



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## IRS Operational Information

The best IRS webpages that will help you keep abreast of IRS operational updates, changes and activities are:

- **IRS Operations During COVID-19: Mission-critical functions continue:**  
<https://www.irs.gov/newsroom/irs-operations-during-covid-19-mission-critical-functions-continue>
- **IRS Coronavirus related information**  
<https://www.irs.gov/coronavirus-tax-relief-and-economic-impact-payments>



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# Tips for Preparing for Filing Season



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## Preparing for Filing Season

- ✓ If you have a new baby/new dependent - Apply for
  1. A Social Security number (with [SSA](#)), or
  2. An [Individual Taxpayer Identification Number](#) (with IRS).
- ✓ To help prevent Identity theft, you can apply for an [Identity Protection Personal Identification Number](#) (IP PIN), if you choose.
- ✓ Do a tax withholding check-up and make adjustments, if needed.

*Watch for TAS Pre-Filing Awareness events in January 2022!*



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## What Else Does TAS Do?

- We also address large-scale, systemic issues that affect many taxpayers.
- We raise these concerns to senior leaders at the IRS.
- Know of a tax problem that affects more than one taxpayer?

Use our Systemic Advocacy Management System at: <https://www.irs.gov/advocate/systemic-advocacy-management-system-sams>



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## TAXPAYER BILL OF RIGHTS

A FRAMEWORK FOR EFFECTIVE TAX ADMINISTRATION

- The Right to* Be Informed
- The Right to* Quality Service
- The Right to* Pay No More than the Correct Amount of Tax
- The Right to* Challenge the IRS's Position and Be Heard
- The Right to* Appeal an IRS Decision in an Independent Forum
- The Right to* Finality
- The Right to* Privacy
- The Right to* Confidentiality
- The Right to* Retain Representation
- The Right to* A Fair and Just Tax System

Learn more at [www.irs.gov/taxpayerrights](http://www.irs.gov/taxpayerrights)

Document 13181 (07-2014) Catalog Number 98812  
Department of the Treasury Internal Revenue Service www.irs.gov



# Your Rights



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## Want to know even more?

Visit **TAS's website** at:

<https://www.taxpayeradvocate.irs.gov/>

Read the **NTA Blog**: [www.TaxpayerAdvocate.irs.gov/about/nta-blog](http://www.TaxpayerAdvocate.irs.gov/about/nta-blog)

Follow our **News** page:

<https://www.taxpayeradvocate.irs.gov/taxnews-information/>

Follow **TAS on Social Media**:

❖ Facebook: [www.facebook.com/YourVoiceatIRS](http://www.facebook.com/YourVoiceatIRS)

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❖ YouTube: [www.youtube.com/TASNTA](http://www.youtube.com/TASNTA)

❖ LinkedIn: <https://www.linkedin.com/company/taxpayer-advocate-service>



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## Remember

The Taxpayer Advocate  
Service is *your voice at the*  
**IRS.**

For more information, visit

<https://www.taxpayeradvocate.irs.gov/>



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