IRS Nationwide Tax Forum 2022

2022 Virtual IRS Nationwide Tax Forum Focus Groups

The Internal Revenue Service (IRS) looks forward to your participation in the 2022 IRS Nationwide Tax Forum. As we have in prior years; we invite you to share your experiences and discuss innovative ideas with us in our focus groups. The IRS will conduct focus groups virtually this year, using a telephone conference line or a video conferencing tool, such as Zoom or Microsoft Teams.

Your willingness to participate in IRS-conducted focus groups is completely voluntary.

Focus groups are scheduled for one hour, with eight to ten participants. Participants who meet the qualifying criteria are selected on a first come, first serve basis. If you are selected, you will receive a confirmation email with information on how to join the focus group. We appreciate you taking time to meet with IRS research staff to share your thoughts and ideas on the topics below.

Focus group topics, descriptions and qualifying criteria are listed below along with the available dates and times for participation. Focus group sign up forms are sent to all registered attendees via email. The sign-up form will also be available within the Virtual NTF Expo event, which opens on July 19.

SB/SE Focus Group Topic 1: Improving the Taxpayer Experience and IRS Services

Description:
The Taxpayer Experience Office (TXO) oversees and drives the IRS strategy for improving the taxpayer experience. The office leads subject matter experts in identifying changing taxpayer expectations and industry trends, while facilitating customer service best practices by collaborating with internal and external stakeholders. During this focus group, we will be discussing how the IRS could improve online service offerings to contribute to a better experience for tax practitioners and their clients.

Qualifying Criteria: Tax Practitioners who serve multiple clients, but especially those whose clients could have multilingual needs, have disabilities, live in rural areas, are older adults or veterans, or have lower incomes. We invite you to join this focus group to share your IRS customer service experiences, challenges, perspectives, and suggestions. Assist the IRS in developing customer service strategies and improve online service offerings that fit you and your clients. Help reimagine customer service at the IRS.

SB/SE FOCUS GROUP TOPIC 1 DATE OPTIONS

- Tuesday, July 19, 2022 at 12:30 PM – 1:30 PM EST
- Tuesday, July 26, 2022 at 12:30 PM – 1:30 PM EST
- Tuesday, August 2, 2022 at 12:30 PM – 1:30 PM EST
- Tuesday, August 9, 2022 at 12:30 PM – 1:30 PM EST
- Tuesday, August 16, 2022 at 12:30 PM – 1:30 PM EST

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SB/SE Focus Group Topic 2: Improving the Taxpayer Experience and IRS Outreach

Description:
The Taxpayer Experience Office (TXO) oversees and drives the IRS strategy for improving the taxpayer experience. The office leads subject matter experts in identifying changing taxpayer expectations and industry trends, while facilitating customer service best practices by collaborating with internal and external stakeholders. During this focus group, we will be discussing how the IRS could improve outreach efforts to contribute to a better experience for tax practitioners and their clients.

Qualifying Criteria: Tax Practitioners who serve multiple clients, but especially those whose clients could have multilingual needs, have disabilities, live in rural areas, are older adults or veterans, or have lower incomes. We invite you to join this focus group to share your IRS customer service experiences, challenges, perspectives, and suggestions. Assist the IRS in developing customer service strategies and improve outreach efforts that fit you and your clients. Help reimagine customer service at the IRS.

SB/SE FOCUS GROUP TOPIC 2 DATE OPTIONS

- Tuesday, July 19, 2022 at 12:30 PM – 1:30 PM EST
- Tuesday, July 26, 2022 at 12:30 PM – 1:30 PM EST
- Tuesday, August 2, 2022 at 12:30 PM – 1:30 PM EST
- Tuesday, August 9, 2022 at 12:30 PM – 1:30 PM EST
- Tuesday, August 16, 2022 at 12:30 PM – 1:30 PM EST

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SB/SE Focus Group Topic 3: Tax Pro Account and Business Online Account

Description:
The Office of Online Services is seeking feedback on the Tax Pro Account portal and the proposed Business Online Account. During this focus group, we will discuss how the IRS could improve the Tax Pro Account and suggestions for developing the Business Online Account portal.

Qualifying Criteria: Tax Practitioners who represent at least three (3) clients before the IRS using a Form 2848, *Power of Attorney and Declaration of Representative* or Form 8821, *Tax Information Authorization*. We invite you to join this focus group to share your thoughts and experiences on the Tax Pro Account and the proposed Business Online Account to gain insight into customer needs, expectations, and preferences.

SB/SE FOCUS GROUP TOPIC 3 DATE OPTIONS

- Wednesday, July 20, 2022 at 12:30 PM – 1:30 PM EST
- Wednesday, July 27, 2022 at 12:30 PM – 1:30 PM EST
- Wednesday, August 3, 2022 at 12:30 PM – 1:30 PM EST
- Wednesday, August 10, 2022 at 12:30 PM – 1:30 PM EST
- Wednesday, August 17, 2022 at 12:30 PM – 1:30 PM EST

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SB/SE Focus Group Topic 4: Digital Asset Transactions

Description:
Digital Asset Transactions, like virtual currency and non-fungible tokens (NFTs) are a fast-growing segment of the financial market. Taxpayers and their representatives have struggled to understand new reporting requirements as the IRS incrementally introduced new rules regarding reporting and taxability. During this focus group, we will discuss reporting challenges tax practitioners have noticed while working with their clients, their current understanding of the tax treatment, and how the IRS could improve the current information available to taxpayers.

Qualifying Criteria: Tax Practitioners who serve clients with digital assets, like virtual currency and non-fungible tokens (NFTs). We invite you to join this focus group to discuss your estimation on whether these transactions are becoming more mainstream, your view on how the IRS can better notify you and your clients of reporting requirements, and your opinions on the filing challenges of digital assets and/or transactions.

SB/SE FOCUS GROUP TOPIC 4 DATE OPTIONS

- Wednesday, July 20, 2022 at 12:30 PM – 1:30 PM EST
- Wednesday, July 27, 2022 at 12:30 PM – 1:30 PM EST
- Wednesday, August 3, 2022 at 12:30 PM – 1:30 PM EST
- Wednesday, August 10, 2022 at 12:30 PM – 1:30 PM EST
- Wednesday, August 17, 2022 at 12:30 PM – 1:30 PM EST

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SB/SE Focus Group Topic 5: Tax Treatment of Retirement Distributions

Description:
The IRS is seeking feedback on how to improve information about retirement plan distributions. During this focus group, we will discuss reporting challenges tax practitioners have noticed while working with their clients, their current understanding of the tax treatment for various retirement plan distributions, and how the IRS could improve the current information available to taxpayers.

Qualifying Criteria: Tax Practitioners who have at least three (3) clients who receive Form 1099-R, *Distributions from Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.* We invite you to join this focus group to share your experience about your clients' reporting challenges and tax understanding of various retirement plan distributions. The feedback will assist with improving forms, instructions, publications, online resources, and educational communications.

SB/SE FOCUS GROUP TOPIC 5 DATE OPTIONS

- Thursday, July 21, 2022 at 12:30 PM – 1:30 PM EST
- Thursday, July 28, 2022 at 12:30 PM – 1:30 PM EST
- Thursday, August 4, 2022 at 12:30 PM – 1:30 PM EST
- Thursday, August 11, 2022 at 12:30 PM – 1:30 PM EST
- Thursday, August 18, 2022 at 12:30 PM – 1:30 PM EST

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SB/SE Focus Group Topic 6: Affordable Care Act Forms

Description:
The IRS is seeking feedback on how to improve information about Affordable Care Act (ACA) regulations and forms. During this focus group, we will discuss challenges tax practitioners have encountered while working with their clients on ACA forms, understanding of ACA regulations, and how the IRS can improve the information available to taxpayers.

Qualifying Criteria:
Tax Practitioners who have clients with at least 50 full-time (or equivalent) employees or are Applicable Large Employers (ALEs) and are responsible for Affordable Care Act (ACA) regulations and forms. We invite you to join this focus group to share your experiences with ACA information and forms. The feedback will help us better understand your clients' awareness of the reporting challenges and assist with improving ACA forms and instructions.

SB/SE FOCUS GROUP TOPIC 6 DATE OPTIONS

- Thursday, July 21, 2022 at 12:30 PM – 1:30 PM EST
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- Thursday, August 4, 2022 at 12:30 PM – 1:30 PM EST
- Thursday, August 11, 2022 at 12:30 PM – 1:30 PM EST
- Thursday, August 18, 2022 at 12:30 PM – 1:30 PM EST

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TAS Focus Group Topic 1: IRS On-Line Accounts

Description:
As the IRS continues to expand its online presence and offers different online activities to individual taxpayers, businesses, and tax professionals, the Taxpayer Advocate Service (TAS) wants to explore what features are most needed/wanted by tax professionals and others who use or will use the available system. TAS will gather your opinion about what you and your clients would like in terms of IRS online services. TAS is also interested in your/your clients experiences with authenticating your identity when establishing and using an account.

Qualifying Criteria: Tax Practitioners who serve multiple clients, including individuals, business, and corporate who have attempted to obtain on-line services. We invite you to join this focus group to share your IRS customer service experiences, challenges, perspectives, and suggestions. Assist TAS in determining taxpayer needs and preferences for IRS online accounts, including features, authenticating their identity for secure access to their accounts, and experiences associated with establishing and using an online account.

TAS FOCUS GROUP TOPIC 6 DATE OPTIONS

- Tuesday, July 19, 2022 at 12:30 PM – 1:30 PM EST
- Tuesday, July 26, 2022 at 12:30 PM – 1:30 PM ET
- Tuesday, August 2, 2022 at 12:30 PM – 1:30 PM EST
- Tuesday, August 9, 2022 at 12:30 PM – 1:30 PM EST
- Tuesday, August 16, 2022 at 12:30 PM – 1:30 PM EST

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TAS Focus Group Topic 2: Responding to IRS Correspondence Audit Notices

Description:
The IRS sends notices to taxpayers as part of the correspondence audit process. These taxpayers often face challenges navigating this process so much that the IRS finds many taxpayers do not respond to correspondence audit notices. There are many reasons why taxpayers do not respond to IRS communications. The Taxpayer Advocate Service wants to collect information that helps identify the underlying causes of taxpayer non-response to correspondence audit notices and other types of notices and find potential methods to improve response rates.

Qualifying Criteria: Tax Practitioners who serve multiple clients including individuals, business, and corporate who have received an IRS notice in the last year. We invite you to join this focus group to share your IRS customer service experiences, challenges, perspectives, and suggestions. Assist TAS in determining why taxpayers do not respond to various IRS notices and letters and identify possible ways to improve response rates.

TAS FOCUS GROUP TOPIC 2 DATE OPTIONS

- Wednesday, July 20, 2022 at 12:30 PM – 1:30 PM EST
- Wednesday, July 27, 2022 at 12:30 PM – 1:30 PM EST
- Wednesday, August 3, 2022 at 12:30 PM – 1:30 PM EST
- Wednesday, August 10, 2022 at 12:30 PM – 1:30 PM EST
- Wednesday, August 17, 2022 at 12:30 PM – 1:30 PM EST

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W&I Focus Group 1: Taxpayer Civil Rights: Are Your Clients Receiving the Services They Need?

Description: Have you or your clients needed the IRS to provide language translation or interpreter services? Have you had clients with physical or mental disabilities that needed reasonable accommodations when interacting with the IRS? If you answered yes to either of these questions, please consider sharing your experience with us. This focus group will seek to gather information regarding the programs and services offered by the IRS's Civil Rights Unit within the Office of Equity, Diversity, and Inclusion.

Qualifying Criteria: Tax practitioners who serve clients with limited English proficiency and/or with physical or mental disabilities.

Dates and Times:

- Tuesday, July 19, 2022 at 12:30 – 1:30
- Tuesday, July 26, 2022 at 12:30 – 1:30
- Tuesday, August 2, 2022 at 12:30 – 1:30
- Tuesday, August 9, 2022 at 12:30 – 1:30
- Tuesday, August 16, 2022 at 12:30 – 1:30

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W&I Focus Group 2: Online Tools and Resources for Refundable Credits: The Past, the Present, and the Future

Description: Join us to share your experience using online tools and resources designed to help with understanding, filing, and reconciling refundable credits (i.e., Earned Income Tax Credit). We want to know your thoughts and opinions about the Child Tax Credit Update Portal used this filing season for the Advanced Child Tax Credit. Was this tool helpful? Was it easy to use? How could it be improved? Help the IRS understand which tools and online resources you currently use, and which ones you would like to see developed.

Qualifying Criteria: Tax practitioners who serve clients claiming refundable credits such as the Earned Income Tax Credit (EITC) and the Child Tax Credit (CTC).

Dates and Times:

- Wednesday, July 20, 2022 at 12:30 – 1:30
- Wednesday, July 27, 2022 at 12:30 – 1:30
- Wednesday, August 3, 2022 at 12:30 – 1:30
- Wednesday, August 10, 2022 at 12:30 – 1:30
- Wednesday, August 17, 2022 at 12:30 – 1:30

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W&I Focus Group 3: Digital Notices & Letters and IRS Online Accounts: Awareness & Likelihood of Use

Description: Many taxpayers have received paper notices or letters from the IRS, but soon digital notices and letters may become an option. Come share your experiences, thoughts and opinions about potential digital notices and letters, IRS Online Accounts and possible new service options and service channels. We will also discuss security concerns and the safety of personal information.

Qualifying Criteria: Tax Practitioners who serve general clients, especially those that have received notices and letters through the mail.

Dates and Times:

- Thursday, July 21, 2022 at 12:30 PM – 1:30 PM EST
- Thursday, July 28, 2022 at 12:30 PM – 1:30 PM EST
- Thursday, August 4, 2022 at 12:30 PM – 1:30 PM EST
- Thursday, August 11, 2022 at 12:30 PM – 1:30 PM EST
- Thursday, August 18, 2022 at 12:30 PM – 1:30 PM EST

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W&I Focus Group Topic 4: Electronic Payments – Transforming Tax Collections (T2C) For You and Your Clients

Description: Join us to share your experience making tax payments for yourself or your clients. We want to know how you currently make payments for your clients and your use of the Electronic Federal Tax Payment System (EFTPS). Are you familiar with the various electronic payment options for you and your clients? What is your experience with the current EFTPS interface? Are you aware of the Department of the Treasury's initiative to create a new modernized, electronic payment platform Transforming Tax Collections (T2C)? Help the IRS and the Bureau of the Fiscal Service to understand the needs for you and your clients in a tax payment platform to improve the experience for users and reduce any barriers to making federal tax payments.

Qualifying Criteria: Tax practitioners and payroll processors who assist clients with making federal tax payments. This would include both business and individual taxpayers making payments such as federal tax deposits, balance due on a return or notice, estimated tax, installment agreement or any other federal tax payment.

Dates and Times:

- Thursday, August 4, 2022 at 12:30 PM – 1:30 PM EST
- Thursday, August 11, 2022 at 12:30 PM – 1:30 PM EST

Participants who meet the qualifying criteria are selected on a first come, first serve basis. If you are selected, you will receive a confirmation email with information on how to join the focus group. We appreciate you taking time to meet with IRS research staff to share your thoughts and ideas.

We invite you to join these focus groups to share your experience with the IRS. As tax practitioners, you are a critical part of the tax ecosystem and the compliance equation. Your feedback helps us, and we look forward to hearing from you during the sessions.

If you sign up for more than one focus group, please review your selections to assure they are not scheduled for the same time.