



Welcome!



Welcome to the First Thursday IMRS Call

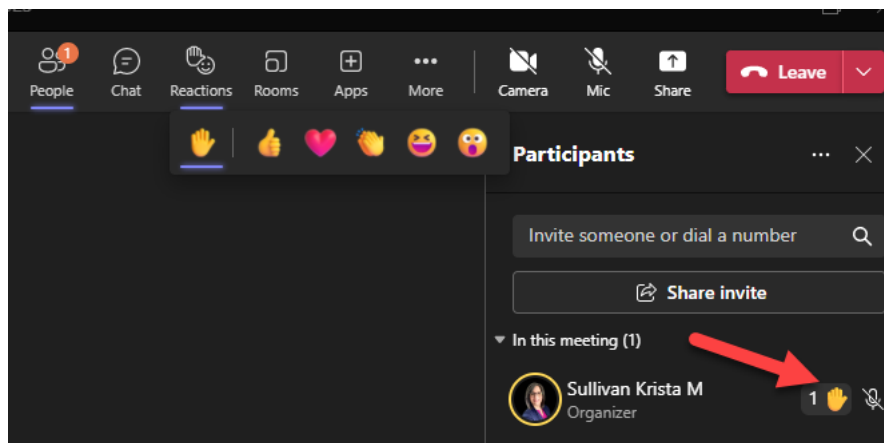
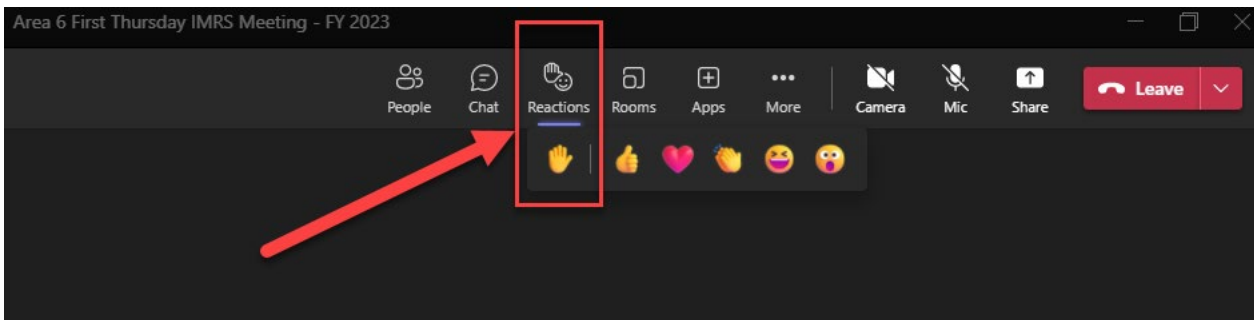
We will begin at 9:00 am Central time.

We will begin at 8:00 am Mountain time

Please mute your microphone upon entry.



MS Teams Meeting Controls



**All attendees are muted upon entry.
Raise your hand to request to be unmuted.**





MS Teams Joining Options

Option 1: Join the meeting from the link you were given. Use your computer speakers or headset for audio.

Option 2: Call this number and enter Meeting ID when prompted.

1-737-253-8186

Meeting ID: 838 814 991#

Reminder: A permanent record is made of all Microsoft Teams meetings, including the participant list and the chat thread.





First Thursday Stakeholder Liaisons

<u>Stakeholder Liaison</u>	<u>Email</u>	<u>States Covering</u>
Lelah Martinez	Lelah.I.Martinez@irs.gov	New Mexico
Neki Cox	Neki.M.Cox@irs.gov	Colorado Nebraska
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Alan Gregerson	Alan.J.Gregerson@irs.gov	Minnesota North Dakota South Dakota
Michael Smith	Michael.Smith6@irs.gov	Wisconsin Missouri
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Christella Sanchez	christella.a.sanchez@irs.gov	Idaho
Lionel Carrillo	lionel.a.carrillo@irs.gov	Wyoming
Roy Chaney	roy.a.chaney@irs.gov	Montana



National Security Awareness Week

December 2, 2024 – December 6, 2024

National Tax Security Awareness Week

IRS and the Security Summit highlight measures against identity theft and scams.

#TAXSECURITY

The IRS logo is located at the bottom center of the graphic. To the right of the text is a brown, speech-bubble-shaped cookie with the hashtag #TAXSECURITY written on it in white icing.



INDIVIDUALS STAY SAFE BY USING AN IDENTITY PROTECTION PIN (IP PIN)



Use an Identity Protection (IP) PIN when filing a tax return, including amended or prior year returns

The IRS will never ask you for your IP PIN

Protect your IP PIN and only share it with trusted tax software provider or tax preparer

Pub 5461-B Get an Identity Protection PIN

2024 National Tax Security Awareness Week
www.IRS.gov/NTSAW





Tax Pros Stay Safe by having a WRITTEN INFORMATION SECURITY PLAN (WISP)



Pub 5461-D Tax professionals should review their security protocols

Pub 5461-F Review account details on secure portal

2024 National Tax Security Awareness Week
www.IRS.gov/NTSAW

Develop a written information security plan (WISP)

Use IRS Secure Online Tools (Tax Pro Account)

Use Multi-Factor Authentication

Know what to do if you have a data breach

Pub 5708 Creating a WISP





1099-K Threshold Change Announced

IRS News Release: IR-2024-299 - [IRS provides transition relief for third-party settlement organizations; Form 1099-K threshold is \\$5,000 for calendar year 2024](#)

For full details, read: [IRS Notice 2024-85](#) (8 pages)

Third-Party Settlement Organizations will be required to report transactions when the amount of total payments for those transactions is more than:

- **\$5,000 in 2024**
- **\$2,500 in 2025**
- **\$600 in calendar year 2026 and after**

For calendar year 2024, the IRS will not assert penalties under section 6651 or 6656 for a TPSO's failure to withhold and pay backup withholding tax during the calendar year.



Tax Pros – Live Chat option

An official website of the United States Government

IRS

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- Enrolled agents
- Annual Filing Season Program participants
- Enrolled retirement plan agents
- Certified Professional Employer Organization (CPEO)
- Enrolled actuaries
- E-file providers
- Modernized e-File



E-Services

Online tools for tax professionals

[Access e-Services](#)



Tax Pro Account

Submit POA and TIA, view all your CAF authorizations and withdraw online

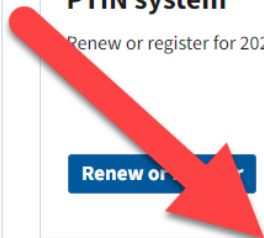
[Use Tax Pro Account](#)



PTIN system

Renew or register for 2025

[Renew or register](#)



[Request power of attorney or tax information authorization](#)



State Updates – 1 of 2

Colorado (Amber Egbert)

Idaho (Tom Shaner)

Kansas (Carl York, Roger Basinger)

Minnesota (Mark Krause)

Missouri (Madesen Bradberry)

Nebraska (Dawn Holtmeier)



State Updates – 2 of 2

New Mexico (Alma Amador)

North Dakota (Liliya Montgomery, Michelle Henke)

Utah (Steven Carlow)

Wisconsin (Rachel Ballmoos)



IMRS is for Issues with an IRS Policy, Practice or Procedure –

**We are listening –
What is on your mind?**



Thank you!

Next meeting 1/9/2025

**One week later than usual due
to January 1st holiday**