



Welcome!



Welcome to the First Thursday IMRS Call

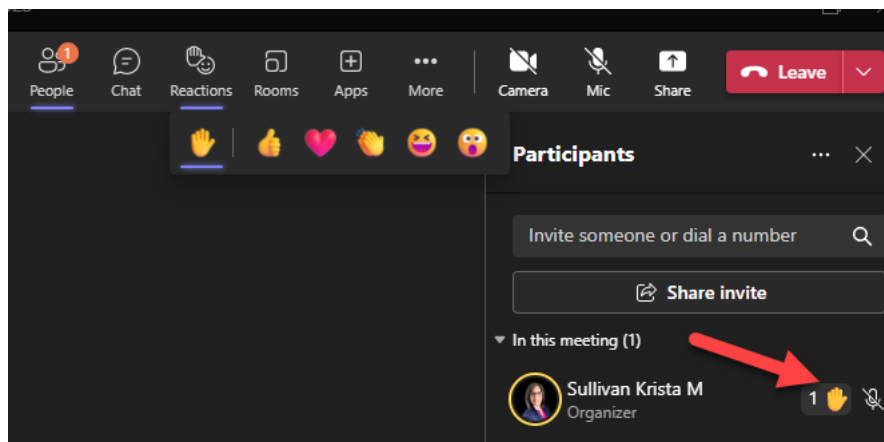
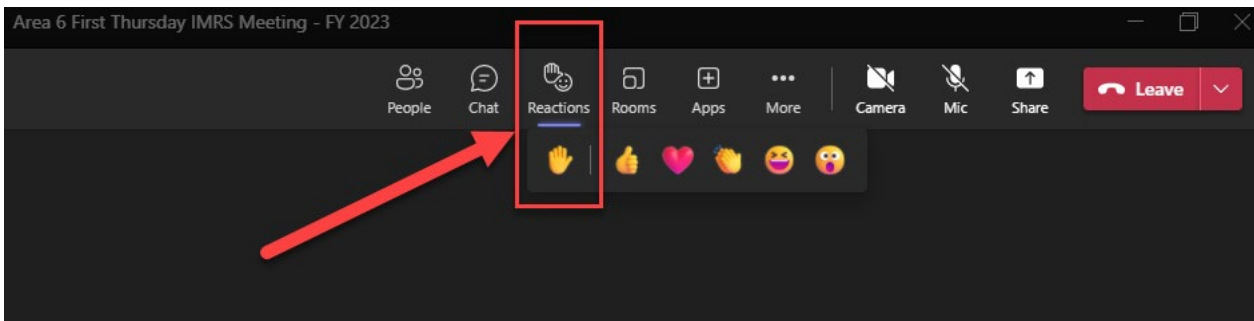
We will begin at 9:00 am Central time.

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
Ann Burton	Ann.Burton@irs.gov	Colorado
Neki Cox	Neki.M.Cox@irs.gov	Nebraska South Dakota
Mercean Lam	Mercean.lam@irs.gov	Oklahoma
Alan Gregerson	Alan.J.Gregerson@irs.gov	Minnesota North Dakota
Michael Smith	Michael.Smith6@irs.gov	Wisconsin
Jody Stamback	Jody.K.Stamback@irs.gov	Idaho Utah
Krista Sullivan	Krista.m.Sullivan@irs.gov	Kansas Missouri



IRS Communications & Liaison

IRS STAKEHOLDER LIAISON

Data Security for Tax Professionals





FTC IRS

- Designated Person
 - Limited Access
 - Security Software
 - Hardware – Encryption & Inventoried
 - Network Protections
 - Passwords
 - Multi-Factor Auth
 - **WISP**
 - Annual Training & Testing
-
- Payroll Services and/or CAS
 - Qualified Individual
 - Board of Directors

IRS Publication 4557



Safeguarding Taxpayer Data

A GUIDE FOR YOUR BUSINESS



Action Items

Done

- Designated Person
- Security Software
- Hardware – Encryption & Inventoried
- Network Protections
- Passwords
- Multi-Factor Auth
- Limited Access

To Do

- **WISP**
- Annual Training
- Payroll Services and/or CAS
- Qualified Individual?
- Board of Directors



IRS Pub 5708, Creating a Written Information Security Plan for your Tax and Accounting Practice

- [Outline.](#)
- [Sample Template](#)
- [Additional Considerations](#)
- [Best Practices](#)





Resources

- IRS Pub 4557,
Safeguarding
Taxpayer Data
- IRS Pub 5708,
Creating a Written
Information Security
Plan for your Tax and
Accounting Practice
- www.ftc.gov
 - “Safeguards Rule”
 - [FTC Data Breach
Response Guide](#)

DATA BREACH RESPONSE

A Guide for Business



Promoting Identity Protection PIN (IPPIN)

Half Full or Half Empty?



Time is Money

- Time to promote the IPPIN

vs.

- Client Sues or Is Lost with Data Breach





Clients Lose Them

- 21 Days: Filed a Tax Return in 2022

vs.

- 430 Days: Victims of Identity Theft who Sent a Form 1439 or Form 14039-B, Identity Theft Affidavit

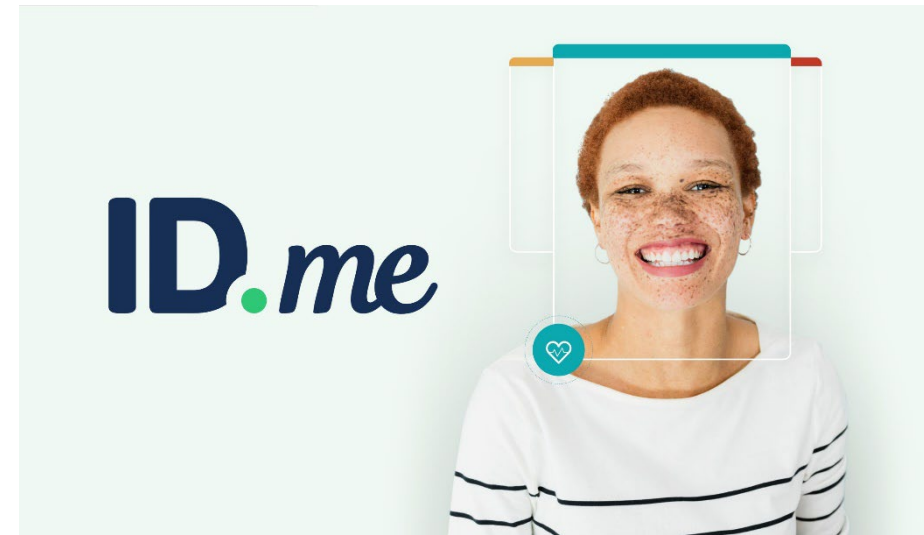


Source: IRS Operations: Status of Mission-Critical Functions



Can Not Pass Online Authentication Process

- Form 15227
- IRS Taxpayer Assistance Centers
- IRS Taxpayer Advocate



Source: IRS Operations: Status of Mission-Critical Functions



I Just Don't Wanna

- Partnership Expectations from SL
- Client Expectations
- Circular 230





Data Breach Trends



Tax Pro Account Update



New (August 14, 2023): View all authorizations, withdraw online

View all your active POAs and TIAs on the CAF and withdraw in real-time. To get started, link your CAF number in your account profile.

⊖ Active authorizations

Tax Pro Account lets you view all of your active authorizations on the CAF when you link your CAF number. This includes active POAs and TIAs from individuals and business entities submitted with forms and through Tax Pro Account.

If you choose not to link your CAF number, you can view only active POAs and TIAs submitted through Tax Pro Account.

⊖ Withdraw authorizations

You can withdraw an authorization in real-time with electronic signature in Tax Pro Account.

Once you withdraw, the authorization is immediately and permanently removed from the CAF database.



Direct Hiring

If you have family or friends interested in a career, please help us promote IRS as a great place to work.

IRS offers multiple benefits including-

- pension,
- 401k matching,
- tuition repayment,
- childcare subsidy,
- transit subsidy,
- 11 paid holidays,
- leave sharing programs and
- a host of other employee programs.

The IRS is hiring for three positions under this special direct hire-

- Tax Examining Technician
- Tax Examining Clerk
- Tax Examining Technician (Bilingual-Spanish)



Direct Hiring

To Apply-

- Submit a resume only
- Submit resumes by September 15, 2023, to kimberly.d.crawford@irs.gov

At the top of the resume include-

- the desired location
- preferred shift (day shift or night shift)
- There is no requirement to apply through USA Jobs

Hiring Locations

Covington KY (Cincinnati)	Holtsville NY
Florence KY	Philadelphia PA
Fresno CA	Memphis TN
Chamblee, GA (Atlanta)	Austin TX
Andover MA	Ogden UT
Kansas City MO	



State Updates – 1 of 2

Colorado (Bessie Castro-Zepeda)

Kansas (Carl York, Roger Basinger)

Minnesota (Mark Krause)

Missouri (Kaylee Dunham)

Nebraska (Dawn Holtmeier)



State Updates – 2 of 2

North Dakota (Michelle Henke, Liliya Montgomery)

Wisconsin (Amanda Mosel)



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

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



Thank you!

Next meeting 10/5/2023