



# Welcome!



## **Welcome to the First Thursday IMRS Call**

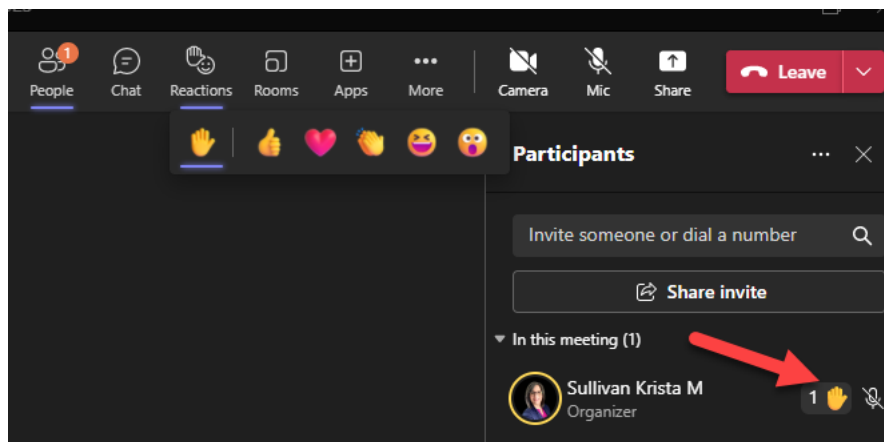
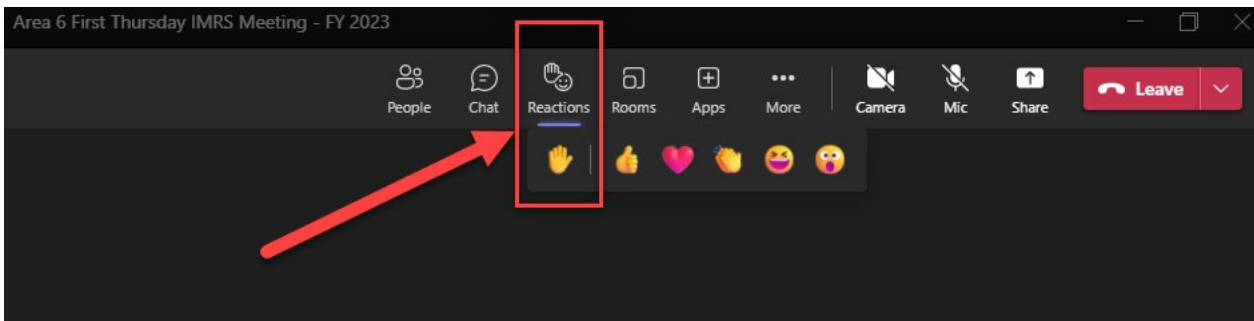
**We will begin at 9:00 am Central time.**

**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	<a href="mailto:Lelah.I.Martinez@irs.gov">Lelah.I.Martinez@irs.gov</a>	New Mexico
TBD		Colorado
Neki Cox	<a href="mailto:Neki.M.Cox@irs.gov">Neki.M.Cox@irs.gov</a>	Nebraska South Dakota Montana Wyoming
Mercean Lam	<a href="mailto:Mercean.lam@irs.gov">Mercean.lam@irs.gov</a>	Oklahoma
Alan Gregerson	<a href="mailto:Alan.J.Gregerson@irs.gov">Alan.J.Gregerson@irs.gov</a>	Minnesota North Dakota
Michael Smith	<a href="mailto:Michael.Smith6@irs.gov">Michael.Smith6@irs.gov</a>	Wisconsin
Jody Stamback	<a href="mailto:Jody.K.Stamback@irs.gov">Jody.K.Stamback@irs.gov</a>	Idaho Utah
Krista Sullivan	<a href="mailto:Krista.m.Sullivan@irs.gov">Krista.m.Sullivan@irs.gov</a>	Kansas Missouri



# CAF and Transcript changes

All tax professionals, please read both:

- IR-2024-136, May 8, 2024 - [To protect against identity theft, IRS adds additional protections to Centralized Authorization File, Transcript Delivery System; changes designed to protect sensitive tax pro, taxpayer information](#)
- [Special alert PDF](#) issued today by the IRS Office of Professional Responsibility.

Tax professionals now need to call the Practitioner Priority Service (PPS) line to request transcripts to be deposited into their Secure Object Repository (SOR) mailbox. IRS employees on other phone lines may not be authorized to provide transcripts through the SOR delivery method. Tax professionals will need to pass enhanced authentication. If the identity of the caller cannot be verified, transcripts will instead be mailed to the taxpayer's address of record.



## Direct File

**IRS makes Direct File a permanent option to file federal tax returns; expanded access for more taxpayers planned for the 2025 filing season.**

- Make available to more taxpayers
- Covering more tax situations
- Involving all state partners

**Decision made following successful pilot**

- 140,803 taxpayers in 12 states filed using Direct File
- Stakeholders reported desire continue Direct File
- Others thought current free file alternatives adequate

**Announcements about new state partners and expanded eligibility are expected in the coming months.**

- Focus on getting it right
- Ensure taxpayers are filing a correct return
- Continue to be one option among many
- Not meant to replace other important options by tax professionals, who are critical partners in delivering a successful tax system

**[Direct File](#)**



# Required Minimum Distributions

## IRS Notice 2024-35



# 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

**North Dakota (Liliya Montgomery, Michelle Henke)**

**Utah (Steven Carlow)**

**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 August 1, 2024**

**(No IMRS meeting in July)**