

# Your Voice at the IRS

## TAS Office of Systemic Advocacy

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# Organizational Structure

- Kim Stewart: Executive Director
- Kevin Kelly: Director, Proactive Advocacy
- Mark Campbell: Director, Advocacy Efforts
- Kurt Van Matre: Technical Advocacy
  - Collection Issues Team
  - Processing Issues Team
  - Exam Issues Team



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# Appropriate Issues:

- Are systemic and impact a segment of taxpayers
- Require study, analysis, recommendations and action to effect positive results
- Involve policies, processes, procedures, or legislation
- Involve more than one taxpayer (Have you seen more than one instance of the problem?)



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# Submitting a New Issue:

- Identify source
- Give a short summary of the issue with key words
- Describe the systemic problem or issue in detail, but without SSNs, EINs
- Determine the “owner” of the process or procedures, if known (SB/SE, W&I, etc.)



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# Systemic Advocacy Management System (SAMS)

- SAMS is a database of systemic issues submitted to the TAS
- Web-based
- Available to all IRS employees with Intranet access <http://sams.web.irs.gov/>
- Available to external stakeholders
- Used to analyze trends, manage projects and portfolios, track IMD reviews and task forces



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# What We Do

- **Oversee the Systemic Advocacy Management System (SAMS)**
- **Develop and work appropriate issues as Information Gathering Projects and Advocacy Projects and Immediate Interventions**
- **Participate on joint IRS task forces/teams**



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# What We Do (cont.)

- Assists in the development and delivery of the National Taxpayer Advocate's Annual Report to Congress
- Oversees TAS's Internal Management Document/Single Point of Contact program



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# Systemic Advocacy Projects

- Information Gathering Projects: Work issues to determine if more in-depth project is warranted
- Immediate Intervention: Systemic issues causing hardship to a great number of taxpayers are addressed immediately
- Advocacy Projects: Non-hardship issues that qualify as “Systemic” problems are assigned to analysts as advocacy projects.



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# How We Communicate with Submitters

- If issue is accepted as project, submitter will receive periodic updates and closing letter upon completion.
- If not accepted, submitter will receive written communication explaining why.



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# Project Success Stories

- Lien Discharges in Short Sales
- Lien Withdrawals (*after Release*)
- Identity Theft Protections
- Employment Taxes & Third Party Payroll Providers



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# Annual Report to Congress

- IRC 7803(c)(2)(b)(ii)(III) requires National Taxpayer Advocate to report on at least 20 of the most serious problems facing taxpayers
- Based on input from numerous sources, e.g., Local Taxpayer Advocates, SAMS, and TAMIS data.



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# IMD/SPOC

- Internal Management Documents (IMD)
- Single Point of Contact (SPOC)
- Review of IRS documents i.e. IRMs, forms, notices, and publications.
- Prevention of additional taxpayer burden or infringement of taxpayer rights.



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# SAMS

You can find us at:

<http://www.irs.gov/advocate>

click the link “What is Systemic Advocacy?”, then click “SAMS -- Systemic Advocacy Management System” at the bottom of the page.



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# FY 2017 Objectives Report

## More Information

More information available on our website:

[www.taxpayeradvocate.irs.gov/2017objectivesreport](http://www.taxpayeradvocate.irs.gov/2017objectivesreport)



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# FY 2017 Objectives Report

NATIONAL TAXPAYER ADVOCATE

## OBJECTIVES REPORT TO CONGRESS

Fiscal Year 2016



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- Tax Toolkit: [www.TaxpayerAdvocate.irs.gov](http://www.TaxpayerAdvocate.irs.gov)



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# Questions?



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