



The question is, what services would have the highest priorities for taxpayers and tax professionals? The IRS needs to improve their credibility with tax professionals as well as taxpayers.

"Where's My Refund" must be real time. We were told at the National Practitioner Forum on February 16 that the "Where's My Refund" application is currently updated once a week. The IRS has been announcing the new Modernized e-File system will be able to acknowledge efiled tax returns within minutes instead of days. We have heard from our members and in our own practice, that acknowledgements are being received while the clients are still in the office; this reduces errors and gets tax returns filed efficiently. Yet the IRS cannot keep the "Where's My Refund" application updated with the same speed and accuracy?

This is where the IRS loses credibility with the tax practitioner community and taxpayers in general. We understand the "Where's My Refund" application was offline and couldn't be accessed for several days. The IRS should have immediately released information on their website, released information on social media, and send email blasts to their stakeholders that there were problems. They should have given a target date when the system would have been up and running in real time and kept their word.

We installed a "Live Chat" feature on our website a few months ago; our phone calls have dropped by about 50% when our members started using the Live Chat feature, this reduced our labor costs and improved customer satisfaction. Today's taxpayers are more internet knowledgeable than ever before. We believe a "Live Chat" with an IRS professional employee would reduce phone calls and deliver effective taxpayer service and reduce the cost of answering the phones.

The IRS appears to be stuck in bureaucracy and is having a difficult time changing its course; let me give you a real life example. I live in Salinas, California where the IRS has a local office staffed with Revenue Agents and Revenue Officers. A client was referred to us because she was having a difficult time dealing with the IRS. The client lives in Soledad, CA which is about 30 miles south of Salinas. The client was being examined by an agent in San Jose, CA which is about 60 miles north of Salinas. The taxpayer was told she had to drive from Soledad to San Jose for the exam, which she did, for a Schedule E audit on two rental properties to validate her depreciation deduction and her passive activity loss limitation calculations; she prepared her return on TurboTax. I called the auditor, asked her why the exam wasn't conducted in Salinas? To have a taxpayer drive 1 ½ hours each way when there is an IRS office within a 30 minute drive seemed unreasonable. I was told the audit would not be moved to the Salinas office. After some discussion, the examiner agreed this could be a correspondence audit.

The IRS employee should have been considerate to the taxpayer. Instead she chose to increase the taxpayer burden by forcing the taxpayer to take time off work and to drive several

hours back and forth to an exam, which could have been a correspondence audit to begin with, or originated in the Salinas IRS office. Why was this exam originated in San Jose instead of Salinas? The IRS needs to take a close look at their assets, with the technology available today, it would seem the IRS could make more cost effective decisions and reduce taxpayer burden by assigning audits to IRS offices closest to the taxpayers.

Another real life example, we were finishing up a tax audit in the IRS office, the taxpayer agreed and signed off on the changes and asked for an installment agreement. The examiner brought a collections officer to the meeting and filled out a financial statement and an installment agreement. The taxpayers signed off on the installment agreement and everyone was satisfied that they were able to finish their ordeal in one meeting. A week later the collections officer told me her manager would not allow the installment agreement to go forward because it did not follow proper channels. If the IRS needs to do more with less, get Congress to change the law, or the IRS change their procedures so that taxpayers who agree with examination changes and need an installment agreement can get a solution while in the office and while they are agreeable. The longer it takes, the worse it gets to collect. A one-stop shop so to speak.

Successful organizations, whether large or small, understand the importance of training front line employees to be customer service oriented..

There are many cost effective ways to use technology to get world class training in customer service to front line IRS employees. Customer service training is not an expense it's an investment to improve efficiency and productivity.

Thank You,

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Executive Director

