

We Want You to Know

IRS Operations During COVID-19:

Visit [IRS Operations During COVID-19: Mission-critical functions continue](#) for updates on current IRS actions. To save this link as a favorite, from the [IRS](#) home page, scroll down to the bottom to *News & Announcements*, click the blue arrow and look for “IRS Operations Status.”

Local Stakeholder Liaison Contacts:

Contact your local [Stakeholder Liaison](#) for assistance. It’s not necessary to wait for the IMRS calls to raise an issue.

Appeals’ Priorities for 2023:

The IRS Independent Office of Appeals released its focus guide for fiscal year 2023. Appeals is taking important steps to expand communications with external stakeholders and to improve taxpayer access to Appeals. See [IRS Independent Office of Appeals’ priorities for 2023 focus on taxpayer service](#) for more details.

The focus guide outlines the taxpayer service initiatives you can expect over the coming year, including:

- Increasing stakeholder outreach – including to historically marginalized and limited English proficient communities—about the appeals process.
- Improving access to in-person and [video conferences](#) and [revising letters](#) and notices to ensure taxpayers understand that it is generally their choice how to meet with Appeals.
- Leveraging technology to improve how Appeals works and manages its cases.
- Continuing the **Practitioner Perspectives** series in which tax practitioners share insights and feedback with Appeals employees. Recordings of prior panel discussions on [Collection Appeals](#) and [Examination Appeals](#) are available.
- Developing training for Appeals employees on enhancing customer engagement.

New Hires to Help Taxpayers in Person:

In addition to the more than 4,000 people recently hired to fill critical customer service representative positions, the Internal Revenue Service is now seeking over 700 new employees to help taxpayers at Taxpayer Assistance Centers across the country.

For these 700 openings, the technical positions needed are Individual Taxpayer Advisory Specialists who provide face-to-face assistance in IRS Taxpayer Assistance Center (TAC) offices and the Initial Assistance Representatives, responsible for greeting and determining the needs of taxpayers visiting TAC offices.

In addition to the face-to-face representatives and phone assistors, the IRS is also working to hire additional people throughout the agency, not just in taxpayer service areas but in Information Technology and compliance positions – all with a goal of improving the work the IRS does. Refer to [IRS announces job openings to hire over 700 new employees across the country to help taxpayers in person.](#)

National Virtual Settlement Event

The IRS Office of Chief Counsel partnered with the American Bar Association Tax Section to hold its first centralized National Virtual Settlement Event. This four-day event was inspired by the monthlong virtual event held in March 2021 during the height of the COVID-19 pandemic.

Over the course of four days, an exceptional number of cases were settled: a total of 44. There were at least 59 meetings from October 24 through October 27 that included taxpayers, pro bono attorneys and representatives of the IRS Office of Chief Counsel. The National Virtual Settlement event does not replace local or in-person Settlement Day events but instead offers taxpayers greater access to free

legal advice and support for their Tax Court cases. See [IRS hosts first centralized National Virtual Settlement Event helping more taxpayers settle Tax Court cases](#) for additional information.

National Tax Security Awareness Week

The Internal Revenue Service and the Security Summit partners urged tax professionals to remain focused on security issues and to review resources available to them, including sample security plans and checklists. Refer to [Security Summit offers tools, tips to tax pros during National Tax Security Awareness Week; highlights importance of security plans.](#)

New Issues:

Practitioner Priority Service Line

Issue: Practitioner raised issue of accessibility on PPS line for assistance

Resolution: IRS is aware of the issue. IRS is moving to improve service and increased hiring, refer to [IRS quickly moves forward with taxpayer service improvements; 4,000 hired to provide more help to people during 2023 tax season on phones](#)

Status: Closed. Feedback was elevated.

Income on Form 1099-K

Issue: Practitioner raised question on 1099-Ks being issued and how non-income items will be identified.

Resolution: The third-party settlement organization or its electronic payment facilitator is responsible for reporting the gross amounts of reportable transactions paid to participating payees in their network. income if eligible. Check [Form 1099-K Frequently Asked Questions](#) and see [Webinars for Tax Practitioners](#) for upcoming webinars.

Status: Closed. Feedback was elevated.

NEXT MEETING: Wednesday, January 25, 2023

Local Stakeholder Liaisons (by coverage area)

California

Northern California / Bay Area

- Alexa Lam / Alexa.W.Lam@irs.gov
– San Francisco and San Mateo Counties
- Eryka Nolen / Eryka.Nolen@irs.gov
– Contra Costa and Marin Counties
- Keith Kershner / Keith.D.Kershner@irs.gov
– Fresno and Santa Clara Counties
- Rena Newell / Rena.Newell@irs.gov
– Alameda and Sonoma Counties
- Susan Du / Susan.Du@irs.gov
– Sacramento, Solano, and Napa Counties

Southern California / Los Angeles

- Lionel Carrillo / Lionel.A.Carrillo@irs.gov
– South Bay (Los Angeles), San Gabriel, San Fernando Valley, and Riverside Counties
- Lisa Hamilton / Lisa.A.Hamilton@irs.gov
– Riverside, Imperial, and San Bernardino Counties
- Lourdes Jimenez / Lourdes.Jimenez@irs.gov
– Los Angeles, Antelope Valley, San Gabriel, Santa Clarita, Ventura, San Fernando Valley, and Santa Barbara Counties
- Roy Chaney / Roy.A.Chaney@irs.gov
– Los Angeles (South Bay and West Los Angeles) Counties

Southern California / San Diego and Orange County

- Christella Sanchez / Christella.A.Sanchez@irs.gov
– Orange County
- Kenji Chavez / Kenji.Chavez@irs.gov
– San Diego

Hawaii

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