

2019 Current Fiscal Year Report: Electronic Tax Administration Advisory Committee

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| | | | |
|---|---|----------------------------------|------------------------------|
| 1. Department or Agency | | | 2. Fiscal Year |
| Department of the Treasury | | | 2019 |
| 3. Committee or Subcommittee | | | 3b. GSA Committee No. |
| Electronic Tax Administration Advisory Committee | | | 5218 |
| 4. Is this New During Fiscal Year? | 5. Current Charter | 6. Expected Renewal Date | 7. Expected Term Date |
| No | 03/18/2020 | 03/18/2022 | |
| 8a. Was Terminated During FiscalYear? | 8b. Specific Termination Authority | 8c. Actual Term Date | |
| No | | | |
| 9. Agency Recommendation for Next FiscalYear | 10a. Legislation Req to Terminate? | 10b. Legislation Pending? | |
| Continue | No | Not Applicable | |

| | | | |
|---|------------------------------|---------------------------|---------------------------|
| 11. Establishment Authority | Statutory (Congress Created) | | |
| 12. Specific Establishment Authority | 13. Effective Date | 14. Committee Type | 14c. Presidential? |
| Public Law 105-206 | 10/21/1997 | Continuing | No |

15. Description of Committee Non Scientific Program Advisory Board

16a. Total Number of Reports 1

| | |
|-------------------------|--|
| 16b. Report Date | Report Title |
| 06/19/2019 | Electronic Tax Administration Advisory Committee June 2019 Annual Report to Congress |

Number of Committee Reports Listed: 1

17a. Open 1 **17b. Closed** 0 **17c. Partially Closed** 0 **Other Activities** 0 **17d. Total** 1

Meetings and Dates

| Purpose | Start | End |
|--|--------------|------------|
| Public Meeting to present the annual report to the Internal Revenue Commissioner and his executive team. | 06/19/2019 | 06/19/2019 |

Number of Committee Meetings Listed: 1

| | Current FY | Next FY |
|---|-------------------|----------------|
| 18a(1). Personnel Pmts to Non-Federal Members | \$0.00 | \$0.00 |
| 18a(2). Personnel Pmts to Federal Members | \$0.00 | \$0.00 |
| 18a(3). Personnel Pmts to Federal Staff | \$243,692.00 | \$248,078.00 |
| 18a(4). Personnel Pmts to Non-Member Consultants | \$0.00 | \$0.00 |
| 18b(1). Travel and Per Diem to Non-Federal Members | \$49,720.00 | \$50,615.00 |

| | | |
|---|--------------|--------------|
| 18b(2). Travel and Per Diem to Federal Members | \$0.00 | \$0.00 |
| 18b(3). Travel and Per Diem to Federal Staff | \$0.00 | \$0.00 |
| 18b(4). Travel and Per Diem to Non-member Consultants | \$0.00 | \$0.00 |
| 18c. Other(rents,user charges, graphics, printing, mail, etc.) | \$2,154.00 | \$2,192.00 |
| 18d. Total | \$295,566.00 | \$300,885.00 |
| 19. Federal Staff Support Years (FTE) | 1.50 | 1.50 |

20a. How does the Committee accomplish its purpose?

The Electronic Tax Administration Advisory Committee (ETAAC) provides continued input into the development and implementation of the IRS organizational strategy for electronic tax administration. The ETAAC will provide an organized public forum for discussion of electronic tax administration issues such as prevention of identity theft and refund fraud in support of the overriding goal that paperless filing should be the preferred and most convenient method of filing tax and information returns. The ETAAC members will convey the public's perceptions of IRS electronic tax administration activities, offer constructive observations about current or proposed policies, programs and procedures, and suggest improvements. The ETAAC also provides an annual report to Congress on IRS progress in meeting the Restructuring and Reform Act of 1998 goals for electronic filing of tax and information returns. The ETAAC will research, analyze, consider, and make recommendations on a wide range of electronic tax administration issues and will provide input into the development of the strategic plan for electronic tax administration.

20b. How does the Committee balance its membership?

The number and membership balance of the ETAAC is not static and will vary depending on the IRS's needs and the work of the ETAAC. Each ETAAC member is appointed to represent a point of view from within the electronic filing community, including organizations varying in size and type. Each member may also represent a customer segment based upon topics of interest to those in the electronic filing industry. ETAAC members are representatives from the electronic filing community, including: tax practitioners, tax preparers, computerized tax processors, business owners and state tax administrators. Subject matter or technical expertise in tax software and electronic filing as they relate to accuracy, security and privacy are necessary to accomplish the tasks of the ETAAC. Individuals with experience as a senior official with a state agency, academia, or private industry are likely to have the appropriate level of technical expertise.

20c. How frequent and relevant are the Committee Meetings?

The ETAAC conducts at least one but no more than two public meetings, and several working sessions either face-to-face as budget allows or via conference call. In addition, an orientation session is held each year and specific issues being worked may require

additional meetings.

20d. Why can't the advice or information this committee provides be obtained elsewhere?

ETAAC provides continued input into the development and implementation of the Internal Revenue Service's (IRS's) strategy for electronic tax administration. ETAAC also provides an organized public forum for discussion of electronic tax administration issues. ETAAC members convey the public's perceptions of the IRS electronic tax administration activities, offer constructive observations about current or proposed policies, programs, and procedures, and suggest improvements.

20e. Why is it necessary to close and/or partially closed committee meetings?

Some meetings are working sessions and members may have access to proprietary information.

21. Remarks

Designated Federal Officer

John Lipold Branch Chief, National Public Liaison

| Committee Members | Start | End | Occupation | Member Designation |
|--------------------------|--------------|------------|---|---------------------------|
| Ams, John | 09/20/2016 | 08/31/2019 | National Society of Accountants | Representative Member |
| Bond, Shannon | 09/20/2016 | 08/31/2019 | Wolters Kluwer | Representative Member |
| Breyault, John | 01/07/2017 | 08/31/2019 | National Consumers League | Representative Member |
| Brown, Luanne | 09/01/2017 | 08/31/2020 | Grand Valley State University | Representative Member |
| Camp, Angela | 01/07/2017 | 08/31/2019 | Inuit | Representative Member |
| Carlton, Latryna | 09/24/2019 | 08/31/2022 | Committed Citizens of Waverly | Representative Member |
| Craig, John | 09/20/2016 | 08/31/2019 | J.C. Craig Consulting | Representative Member |
| Eubanks, Daniel | 09/24/2019 | 08/31/2022 | Intuit, Inc | Representative Member |
| Gray, Larry | 09/24/2019 | 08/31/2022 | AGC Alfermann, Gray & Co CPA | Representative Member |
| Hallings, Jenine | 09/01/2017 | 08/31/2020 | Paychex, Inc. | Representative Member |
| Jackman, Michael | 09/01/2017 | 08/31/2020 | Michael Jackman LLC | Representative Member |
| Kay-Decker, Courtney | 09/01/2017 | 08/31/2020 | Iowa Department of Revenue | Representative Member |
| Kreger, John | 09/24/2019 | 08/31/2022 | SOVOS Compliance LLC | Representative Member |
| Kruger, Suzanne | 09/01/2017 | 08/31/2020 | Montana Department of Revenue | Representative Member |
| Macca, Laura | 09/24/2019 | 08/31/2022 | Eisner Amper LLP | Representative Member |
| Magee, Julie | 09/24/2019 | 08/31/2022 | Credit Karma Tax, Inc | Representative Member |
| Navarro, Ada | 09/24/2019 | 08/31/2022 | State of Connecticut | Representative Member |
| Pickering, Katherine | 09/20/2016 | 08/31/2019 | H&R Block | Representative Member |
| Poirier, Phillip | 09/20/2016 | 08/31/2020 | Phillip L. Poirier Jr. Volunteer Consulting | Representative Member |
| Riley, Lynnette | 09/25/2018 | 08/31/2021 | Georgia Department of Revenue | Representative Member |
| Rowley, Cynthia | 09/24/2019 | 08/31/2022 | State of Minnesota | Representative Member |
| Salo, Gene | 09/25/2018 | 08/31/2021 | Thomson Reuters | Representative Member |
| Sapp, John | 09/20/2016 | 08/31/2019 | Drake Software | Representative Member |
| Sica, Joseph | 09/20/2016 | 08/31/2019 | TPG Santa Barbara | Representative Member |
| Steber, Mark | 09/20/2016 | 08/31/2019 | Jackson Hewitt | Representative Member |
| Vickers, Matthew | 09/24/2019 | 08/31/2022 | XERO Inc | Representative Member |
| Warren, Doreen | 09/20/2016 | 08/31/2019 | Idaho Department of Revenue | Representative Member |

Number of Committee Members Listed: 27

Narrative Description

The Electronic Tax Administration Advisory Committee (ETAAC) supports the IRS mission and its strategic plan by providing suggestions to assist the Service in meeting its goal to have at least 80 percent of all tax and information returns filed electronically.

What are the most significant program outcomes associated with this committee?

Checked if Applies

- Improvements to health or safety
- Trust in government
- Major policy changes
- Advance in scientific research
- Effective grant making
- Improved service delivery
- Increased customer satisfaction
- Implementation of laws or regulatory requirements
- Other

Outcome Comments

NA

What are the cost savings associated with this committee?

Checked if Applies

- None
- Unable to Determine
- Under \$100,000
- \$100,000 - \$500,000
- \$500,001 - \$1,000,000
- \$1,000,001 - \$5,000,000
- \$5,000,001 - \$10,000,000
- Over \$10,000,000
- Cost Savings Other

Cost Savings Comments

Although we receive great information from the ETAAC, we determine how to implement their recommendations. We may scale back the implementation due to budget constraints.

What is the approximate Number of recommendations produced by this committee for the life of the committee?

317

Number of Recommendations Comments

The FY 2019 ETAAC Report to Congress (dated June 2019) had 10 recommendations.

What is the approximate Percentage of these recommendations that have been or will be Fully implemented by the agency?

50%

% of Recommendations Fully Implemented Comments

Over the years, the committee has duplicated or re-stated recommendations.

What is the approximate Percentage of these recommendations that have been or will be Partially implemented by the agency?

10%

% of Recommendations Partially Implemented Comments

Over the years, the committee has duplicated or re-stated recommendations.

Does the agency provide the committee with feedback regarding actions taken to implement recommendations or advice offered?

Yes No Not Applicable

Agency Feedback Comments

The agency provides feedback to the ETAAC members during meetings, via e-mail and conference calls. At the ETAAC public meetings, IRS provides members with response to recommendations by category. A formal written response is given.

What other actions has the agency taken as a result of the committee's advice or recommendation?

Checked if Applies

- Reorganized Priorities
- Reallocated resources
- Issued new regulation
- Proposed legislation
- Approved grants or other payments

Other

Action Comments

NA

Is the Committee engaged in the review of applications for grants?

No

Grant Review Comments

NA

How is access provided to the information for the Committee's documentation?

Checked if Applies

Contact DFO

Online Agency Web Site

Online Committee Web Site

Online GSA FACA Web Site

Publications

Other

Access Comments

N/A