2024 Current Fiscal Year Report: Electronic Tax Administration Advisory Committee

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1. Department or Agency	2. Fiscal Year
Department of the Treasury	2024

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	03/06/2024	03/06/2026	

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. Commitee 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 No Reports for this FiscalYear

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

Meetings and Dates

No Meetings

	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	$0.00	$0.00
18a(4). Personnel Pmts to Non-Member Consultants	$0.00	$0.00
18b(1). Travel and Per Diem to Non-Federal Members	$0.00	$0.00
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.)	$0.00	$0.00
18d. Total	$0.00	$0.00
19. Federal Staff Support Years (FTE)	0.00	0.00

20a. How does the Committee accomplish its purpose?

The Electronic Tax Administration Advisory Committee (ETAAC) provides continuing advice to IRS on the development and implementation of the agency's organizational strategy for electronic tax administration. The ETAAC provides 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. ETAAC members convey public 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 researches, analyzes, considers and makes recommendations on a wide range of electronic tax administration issues.

20b. How does the Committee balance its membership?

The number of members and membership balance of the ETAAC is not static and varies depending on agency needs. 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 present topics of interest to external stakeholders. ETAAC members represent taxpayers, tax practitioners, tax preparers, computerized tax processors, business owners, state tax administrators, financial service providers and the payroll industry. 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. Members are typically drawn from the areas of state taxation, private tax industry and consumer advocacy.

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

The ETAAC conducts at least one but no more than four public meetings, and several working sessions each year. In addition, there is an annual orientation session. Specific issues may require additional meetings.

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

ETAAC provides continuing input into the development and implementation of the Internal Revenue Service's IRS strategy for electronic tax administration. ETAAC also provides an organized public forum for discussion of issues involving electronic tax administration. ETAAC members 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.

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

N/A

21. Remarks

The working sessions and orientation listed under "meetings" were held to provide ETAAC members the opportunity to meet with IRS executives and subject matter experts for issue briefings, facilitate discussions, and to analyze and formulate feedback and/or recommendations.

Designated Federal Officer

John Lipold Branch Chief, Tax Pro Partnerships & Advisory Groups Branch, National Public Liaison

Committee Members	Start	End	Occupation	Member Designation
Ballew, Jared	09/22/2020	06/30/2024	CERCA, NACTP	Representative Member
Barca, Peter	09/29/2021	06/30/2024	Revenue Secretary, Wisconsin Department of Revenue	Representative Member
Barnett, Vernon	09/29/2021	06/30/2024	Commissioner, Alabama Department of Revenue	Representative Member
Emeagwai, Austin	09/20/2022	06/30/2025	LeMoyne-Owen College	Representative Member
Gaddis, Jerry	09/20/2022	06/30/2025	Tropical Tax Solutions	Representative Member

Gettemy, Robert	09/20/2022	06/30/2025	Iowa State University	Representative Member
Gilson, Ronald	09/19/2023	06/27/2026	KRKCR Inc.	Representative Member
Godfrey, Mark	09/29/2021	06/30/2024	Director, Taxation Division, Missouri Department of Revenue	Representative Member
Grennes, Robert	09/19/2023	06/27/2026	Commissioner, Indiana Department of Revenue	Representative Member
Harding, Doug	09/19/2023	06/27/2026	Connecticut Department of Revenue Services	Representative Member
Jennison, Andrew	09/19/2023	06/27/2026	CGI Technologies & Solutions	Representative Member
Jude, Jihan	09/29/2021	06/30/2024	Attorney and Counselor at Law, Davey Law Group	Representative Member
Lew, Carol	09/19/2023	06/27/2026	Stradling, Yocca, Carlson & Rauth	Representative Member
Lunardini, Jonathan	09/29/2021	06/30/2024	State of California Franchise Tax Board	Representative Member
O'Leary, Argi	09/20/2022	06/30/2025	Ryan, LLC	Representative Member
Paille, James	09/29/2021	06/30/2024	Compliance Officer, Thomson Reuters	Representative Member
Parchman, Hallie	09/20/2022	06/30/2025	Amazon	Representative Member
Phillips, Andrew	09/22/2020	06/30/2024	CERCA, IDTTRF, ISAC	Representative Member
Pilarski, RaeAnn	09/20/2022	06/30/2025	Code For America	Representative Member
Plaza, Stephanie	09/19/2023	06/27/2026	Wolters Kluwer	Representative Member
Richardson, Keith	09/20/2022	06/30/2025	District of Columbia, Office of Tax and Revenue	Representative Member
Steber, Mark	09/19/2023	06/27/2026	Jackson Hewitt Tax Services	Representative Member
Steenblock, Terri	09/29/2021	06/30/2024	Director of Compliance, FTA	Representative Member
Taluy, Timur	09/22/2020	06/30/2024	CERCA, Security Summit	Representative Member
Wang Miller, Amy	09/19/2023	06/27/2026	Carta, Inc.	Representative Member

Number of Committee Members Listed: 25

Narrative Description

The Electronic Tax Administration Advisory Committee (ETAAC) supports the IRS mission by recommending ways to increase electronic filing of all tax forms and providing advice on IRS efforts to prevent identity-theft driven tax refund fraud.

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

What is the approximate Number of recommendations produced by this committee for the life of the committee?
411

Number of Recommendations Comments
This figure includes 24 recommendations in the Committee's 2023 Public Report directed to the IRS. The report had two additional recommendations directed to Congress that are not included here.

What is the approximate Percentage of these recommendations that have been or will be Fully implemented by the agency?
24%

% of Recommendations Fully Implemented Comments
In 2016, the ETAAC charter was amended to focus on identity theft and refund fraud prevention. This percentage reflects fully implemented recommendations since that charter amendment.

What is the approximate Percentage of these recommendations that have been or will be Partially implemented by the agency?
12%

% of Recommendations Partially Implemented Comments
In 2016, the ETAAC charter was amended to focus on identity theft and refund fraud prevention. This percentage reflects partially implemented recommendations since that charter amendment.

Does the agency provide the committee with feedback regarding actions taken to implement recommendations or advice offered?
Yes ☑ No ☐ Not Applicable ☐

Agency Feedback Comments
IRS executives and subject matter experts provide feedback to committee members during meetings, via e-mail and conference calls. The IRS also responds to the Committee on the implementation status of recommendations.

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