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Description of document:	Internal Revenue Service (IRS) Communications and Liaison (C&L) Weekly Activity Reports 2015-2018
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PRIVACY, GOVERNMENTAL  
LIAISON AND DISCLOSURE

**DEPARTMENT OF THE TREASURY  
INTERNAL REVENUE SERVICE  
WASHINGTON, DC 20224**

July 30, 2018

I am responding to your Freedom of Information Act (FOIA) request dated February 27, 2018, that we received on March 6, 2018.

You asked for Communications and Liaison – Weekly Activity Reports for the time period January 1, 2015 to present.

Of the 686 pages located in response to your request, I am enclosing 686 pages. I am withholding seven pages in part for the following reason:

FOIA exemption (b)(6) exempts from disclosure files that, if released, would clearly be an unwarranted invasion of personal privacy. These include medical, personnel, and similar files. We base the determination to withhold on a balancing of interests between the protection of an individual's right to privacy and the public's right to access government information.

The Supreme Court ruled that Congress intended the "similar files" provision to be construed broadly, so that all information which applies to a particular individual qualifies for consideration under exemption (b)(6).

There are also 177 pages redacted as Not IRS Agency Records. These communications do not belong to IRS and are prohibited by Congressional control to make public. Therefore are not subject to the FOIA.

The redacted portions of each page are marked by the applicable FOIA exemptions. This constitutes a partial denial of your request.

You may contact our FOIA Public Liaison, Celeste Neal, to discuss your request at:

1301 Clay Street, Ste. 840S, Oakland, CA 94612  
510-907-5338

The FOIA Public Liaison responds to FOIA and Privacy Act requests for copies of documents maintained by the IRS.

There is no provision in either Act to resolve tax, collection, or processing issues and our staff is not trained to answer questions regarding those issues. If you need assistance with tax related issues, you may call the IRS toll free number at 1-800-829-1040.

If you are unable to resolve your FOIA dispute through the FOIA Public Liaison, you also have the right to contact the Office of Government Information Services (OGIS). The Office of Government Information Services, the Federal FOIA Ombudsman's office, which offers mediation services to help resolve disputes between FOIA requesters and Federal agencies. The contact information for OGIS is:

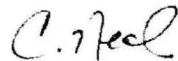
Office of Government Information Services  
National Archives and Records Administration  
8601 Adelphi Road--OGIS  
College Park, MD 20740-6001  
202-741-5770  
877-684-6448  
ogis@nara.gov  
ogis.archives.gov

You have the right to file an administrative appeal within 90 days of the date of this letter. By filing an appeal, you preserve your rights under FOIA and give the agency a chance to review and reconsider your request and the agency's decision. I've enclosed Notice 393, *Information on an IRS Determination to Withhold Records Exempt From the Freedom of Information Act - 5 U.S.C. 552*, to explain your appeal rights.

There are no fees associated with his request.

If you have any questions please call Tax Law Specialist Lauri Takeguchi ID # 1000682891, at 408-283-1465 or write to: Internal Revenue Service, Centralized Processing Unit – Stop 93A, PO Box 621506, Atlanta, GA 30362. Please refer to case number F18065-0101.

Sincerely,



Celeste Neal  
Disclosure Manager  
Disclosure Office 14

Enclosures  
Responsive Documents/CD  
Notice 393



DEPARTMENT OF THE TREASURY  
INTERNAL REVENUE SERVICE  
WASHINGTON, DC 20224

PRIVACY, GOVERNMENTAL  
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July 30, 2018

I am responding to your Freedom of Information Act (FOIA) request dated February 27, 2018, that we received on March 6, 2018.

You asked for Communications and Liaison – Weekly Activity Reports for the time period January 1, 2015 to present.

I am sending you a CD with the requested information in a separate letter.

Your passphrase for F18065-0101 is **Colleg2day!**. To access the information on the CD, please follow the steps below:

1. Double click the .exe file to retrieve the documents.
2. Choose your destination on your system to extract the file.
3. Select Ok.
4. Enter the passphrase **Colleg2day!** to decrypt your responsive documents.
5. Select Ok.

If you have any questions please call Tax Law Specialist Lauri Takeguchi ID # 1000682891, at 408-283-1465 or write to: Internal Revenue Service, Centralized Processing Unit – Stop 93A, PO Box 621506, Atlanta, GA 30362. Please refer to case number F18065-0101.

Sincerely,

A handwritten signature in black ink, appearing to read "C. Neal", is positioned above the typed name.

Celeste Neal  
Disclosure Manager  
Disclosure Office 14

# **Communications and Liaison – Weekly Activity Report**

## **Week of February 2, 2015**

### **Commissioner Events**

Nothing Scheduled

### **Internal Communications**

IRS Headlines

- Learn about training news and resources available to you (HCO)
- IRS expands sign language interpreting, CART services (EDI)
- UNAX: Don't use an "internal" computing system to look up your tax information (PGLD)
- In non-pay status? You'll have to make decisions about your health insurance (AWSS)

Leaders' Alert

- Learn about the resources available for leadership support (HCO)
- Know your responsibilities when you approve requests for religious compensatory time (HCO)
- IRS University expanded to include resources for employees (HCO)
- You will now receive purchase card emails, along with your employees (AWSS)
- Provide employees Feb. 2 IRS Headlines article on managing health insurance coverage in non-pay status (AWSS)

Poll Question

- When did the IRS introduce the Form 1120X, which corporations used to amend their income tax returns? (RAS)

Spotlight

- Equality through integrity (African American History Month) (EDI)

Webbie

- Don't forfeit your time-off award (AWSS)

### **National Media Relations**

### **National Public Liaison**

Tues. Feb. 10, 2p – IRS Tax Forms & Publications Specialist Ryan Scarafie appears on NAEA's Tax Talk Today for panel discussion on business taxes.

### **Legislative Affairs**

### Upcoming Hearings:

Tuesday, February 3, 2015, a hearing is scheduled to be held before the Senate Finance Committee on the impact of FY 2015 budget. The hearing is slated for 10:00 am, in room 215 of the Dirksen Senate Office Building.

Witness: Commissioner, John Koskinen is scheduled to testify

Wednesday, February 11, 2015; a hearing is potentially scheduled to be held before the House Ways and Means Committee on financial transaction structuring. The hearing is scheduled for 10:00 am, in room 1100 of the Longworth House Office Building.

Witness: Commissioner, John Koskinen is scheduled to testify

On Wednesday, February 11, 2015, a hearing is scheduled to be held before the House Committee on Oversight and Government Reform (Full Committee). The hearing will focus on the release of Government Accountability Office's High Risk Report. The hearing is scheduled for 2:00 pm, in room 2154 of the Rayburn House Office Building.

Witness: Commissioner, John Koskinen is scheduled to testify

### **Social Media**

Tumblr posts scheduled for this week:

Monday, February 2

- EITC Video
- Health Care Tax Tip #2: Get Ready to File
- Dirty Dozen
- Tax Tip #10: How to Get What You Need to File Your Taxes

Tuesday, February 3

- First Time Filing a Tax Return? video
- Health Care Tax Tip #3: Premium Tax Credit
- Dirty Dozen
- Taxpayer Bill of Rights #2
- Tax Tip #11: Ten Great Reasons to Visit IRS.gov

Wednesday, February 4

- Return Preparer Directory
- Interactive Tax Assistant video (ASL)
- Dirty Dozen
- Tax Tip #12: Get Connected to the IRS with Social Media

Thursday, February 5

- First Time Filing a Tax Return? video (ASL)
- Health Care Tax Tip #4: Individual Shared Responsibility Payment
- Dirty Dozen
- Tax Tip #13: Reminders About Tip Income

Friday, February 6

- Interactive Tax Assistant video
- Health Care Tax Tip #5: Return Chart
- Tax Tip #14: Tax Benefits for Parents

YouTube videos embedded on IRS.gov this week:

- EITC

Facebook tabs for this week

- Return Preparer Directory (new)
- VITA (new)
- EITC (ongoing)
- Online Tax Help (ITA) (ongoing)
- Dirty Dozen (ongoing)
- Five Ways to Spot a Scam (ongoing)
- Taxpayer Bill of Rights (ongoing)
- IRS Direct Pay (ongoing)
- ACA Pub 5187 (ongoing)
- Choosing a Preparer (ongoing)
- Free File (ongoing)

Potential Twitter topics for this week

- Visit IRS.gov before calling the IRS
- ACA
- Tips for Choosing a Preparer/Preparer Directory
- Free File
- EITC
- Taxpayer Bill of Rights
- Dirty Dozen

## **Corporate Television**

Live/Taped Broadcasts:

- National Taxpayer Advocate 2014 Annual Report to Congress, Streaming Rebroadcast (02/02)
- Appeals – Honorable Buch Training, Polycom/Streaming (02/03)

Streaming Assisted Events:

- N/A

YouTube Postings

- English:
  - Choose a Tax Preparer Wisely
  - IRS2Go 5.0
- Spanish:
  - EITC - Get Tax Help en Espanol
- ASL:

- N/A

Centra Captions:

- TEGE – Senior Manager Operational Review (02/03)
- HCO – Discover the Benefits of Using Skillsoft and L&L 24X7 (02/04)
- HCO – FSLG FY15 CPE – IRAS 2.0 (02/05)
- HCO – First Quarter Awards Ceremony Polycom/Streaming/Centra Live (02/05)

Other Projects:

- SBSE TIP Webinar (02/02-02/04)
- Marketing: Re-recorded English Radio Spots for 2015. Spanish Radio Spots are scheduled to be recorded on February 3
- 2015 Radio PSA Recording -Spanish (02/03)
- Staff Meeting with C&L Director (02/04)
- Studio Maintenance Day (02/06)

Service-Wide Video Editorial Board (SVEB):

SVEB: Five video requests below have been approved by the SVEB:

- Request #274 – TEGE Unrelated Business Income & Exempt Organizations Phone Forum
- Request #280 – TEGE When and how to complete Forms W-9 and 1099-MISC Web conference using Webinterpoint
- Request #281 – TEGE Forms W-4 and W-2: What You Need to Know Web conference using Webinterpoint
- Request #282 – TEGE Highlights of the Second Cycle E Determination Letter Application Process Webinar using Audio Webcast
- Request #283 – LB&I 2015 All Employee e-Town Halls



## **Communications and Liaison – Weekly Activity Report**

### **Week of February 9, 2015**

#### **Internal Communications**

##### IRS Headlines

- You may request time off for religious observances (HCO)
- Free training and developmental resources are available on IRS University (HCO)
- Online tax tools help you file and pay taxes timely (W&I)
- Take advantage of these tax preparation options this filing season (W&I)
- Complete a new Form W-4 before Feb. 22 to stay tax exempt (AWSS)
- Check your contact information in HR Connect (AWSS)

##### Leaders' Alert

- These tax compliance tools can help your employees understand their obligations (HCO)
- IRS settles Quality Step Increase grievance (HCO)
- Create customized employee reports using the Human Resources Reporting Center (AWSS)
- Document your seasonal employees' requests to stay in non-pay status (AWSS)
- Fiscal year 2015 acquisition planning dates now in effect (AWSS)

##### Daily News (webbies)

- Where can you find IRS forms, instructions and publications? (W&I)
- Learn how to earn credits for professional certifications (HCO)

##### Poll Questions

- As an IRS employee, which of the following is NOT a consequence if you do not file or pay your taxes on time? (HCO)

##### Spotlight

- No broken hearts (American Heart Month) (Multiple)

#### **National Media Relations**

##### News releases for week of Feb. 9:

- IRS Warns of Heavy Call Volume, Offers Tips for Faster Answers
- IRS Provides Online Resources to Help Taxpayers
- Filing Season Stats

##### News release possible for coming weeks:

- IRS's Top Ten Identity Theft Prosecutions; Part of Ongoing Efforts to Protect Taxpayers, Prevent Refund Fraud

- Direct Pay

#### Fact Sheets

- TBOR Fact Sheet

### **National Public Liaison**

Tuesday Feb. 10, 2-3 pm – Treasury Office of Tax Policy Adviser Kevin Knopf and IRS Forms & Pubs Tax Specialist Ryan Scarafale participate in Tax Talk Today webcast, “Business Tax Law Update.”

Wednesday Feb. 11, 1-2 pm – Education & Outreach Leadership conference call.

### **Legislative Affairs**

#### Upcoming Meetings:

Currently, there are no meetings scheduled.

#### Upcoming Hearings:

Wednesday, February 11, 2015; a hearing is potentially scheduled to be held before the House Ways and Means Committee on financial transaction structuring. The hearing is scheduled for 10:00 am, in room 1100 of the Longworth House Office Building.

Witness: Commissioner, John Koskinen is scheduled to testify

On Wednesday, February 11, 2015, a hearing is scheduled to be held before the House Committee on Oversight and Government Reform (Full Committee). The hearing will focus on the release of Government Accountability Office’s High Risk Report. The hearing is scheduled for 2:00 pm, in room 2154 of the Rayburn House Office Building.

Witness: Commissioner, John Koskinen is scheduled to testify

### **Social Media**

Tumblr posts scheduled for this week:

#### Monday, February 9

- Interactive Tax Assistant video
- Calling the IRS
- Forms & Publications
- Tax Tip #15: Missing W-2

#### Tuesday, February 10

- Dirty Dozen video
- Free File
- Taxpayer Bill of Rights #3
- Tax Tip #16: SBSE Tax Center

#### Wednesday, February 11

- Choose a Tax Preparer Wisely video
- Savings Bonds
- Interactive Tax Assistant
- Tax Tip #17: Prior Year Tax Information

#### Thursday, February 12

- EITC video
- Need Payment Options?
- E-File
- Tax Tip #18: Tax Help “en Espanol”

Friday, February 13

- Free File video
- ACA and Your Taxes
- High Call Volume News Release
- Tax Tip #19: AMT

YouTube videos embedded on IRS.gov this week:

- IRS2Go

Facebook tabs for this week

- Return Preparer Directory (new)
- VITA (new)
- EITC (ongoing)
- Online Tax Help (ITA) (ongoing)
- Dirty Dozen (ongoing)
- Five Ways to Spot a Scam (ongoing)
- Taxpayer Bill of Rights (ongoing)
- ACA Pub 5187 (ongoing)
- Choosing a Preparer (ongoing)
- Free File (ongoing)

Potential Twitter topics for this week

- Online Tax Calendar
- Pub 17/Online forms and publications
- Visit IRS.gov before calling the IRS
- ACA
- Return Preparer Directory
- Free File
- EITC
- Taxpayer Bill of Rights
- Dirty Dozen

### **Corporate Television**

Live/Taped Broadcasts:

- N/A

Streaming Assisted Events:

- N/A

YouTube Postings

- English:
  - Choose a Tax Preparer Wisely

- IRS2Go 5.0
- Spanish:
  - Get Tax Help en Espanol
- ASL:
  - N/A

Centra Captions:

- EDI – Pre-Open Enrollment Session (02/12)

Other Projects:

- TAS: ACA Training for TAS Employees (02/09-02/12)
- Marketing: Spanish Radio Spots have been recorded. Recordings are going to be sent to Gail Ellis for review and approval. The four topics are: ID Theft, Payment Options, VITA/TCE, and Last Minute Tips.
- ASL Tax Tips Avid Edit (02/10-02/13)
- SPEC ASL Avid Edit (02/10-02/13)
- SPEC Audio Recording Voice Over (02/11)

Service-Wide Video Editorial Board (SVEB):

SVEB: Three video requests have been submitted to the SVEB for review and approval by the SVEB this week:

- Request #286 – Exclusions from Social Security and Medicare Coverage
- Request #287 – Compliance Self-Assessment Tool for Government Entities
- Request #288 – (FSLG) 1099 - MISC Information Return Reporting for Government Entities

SVEB: Five video requests below have been approved by the SVEB:

- Request #266 – TAS Affordable Care Act ELMS Training (a recorded presentation)
- Request #283 – LB&I 2015 All Employee e-Town Hall (Revised to use Onstream for first two sessions). Approval is by the Servicewide Video Editorial Board (SVEB) and the Deputy Commissioner. The use of Onstream is only approved for the first two sessions. Any additional request to use Onstream will need to be presented to the SVEB again.
- Request #284 – CI Lead and Case Analytics (LCA)
- Request #285 – SBSE Collection Payment Alternatives – 2015 “Payment Alternatives When You Owe the IRS” Webinar  
VR #60 – W&I YouTube Accessible Tax Products

# **Communications and Liaison – Weekly Activity Report**

## **Week of February 23, 2015**

### **Internal Communications**

#### IRS Headlines

- Make sure you continue to maintain professional, objective work papers (PGLD)
- Three new ACA training courses now available on ELMS (ACA)

#### Leaders' Alert

- You must document when employees use leave for military service (AWSS)
- Clear your ePerformance inventory of unnecessary files (AWSS)
- Tell your employees about the Florida, Georgia and D.C. IP PIN pilot (W&I)
- Verify status before approving documents in Concur (AWSS)

#### Daily News (webbies)

- IRS contractors must undergo periodic tax compliance checks (HCO)

#### Poll Questions

- National Taxpayer Advocate 2014 annual report to Congress (TAS)

#### Spotlight

- The importance of EITC (EITC Day) (W&I)

### **National Media Relations**

#### **National Public Liaison**

Thursday Feb. 26, 1 pm – Tax Executives Institute Annual Courtesy Meeting with Commissioner Koskinen, LB&I Commissioner Maloy, Chief Counsel Wilkins, Appeals Chief Wielobob and others (Room 3313).

### **Legislative Affairs**

#### Upcoming Meetings:

Currently, there are no meetings scheduled.

#### Upcoming Hearings:

Tuesday, March 3, 2015; a hearing is scheduled to be held before the Senate Appropriations Subcommittee on Financial Services and General Government on the President's Fiscal Year 2016 funding request and budget justification for the IRS. The hearing is scheduled for 2:30 pm, in room SD-124 of the Dirksen Senate Office Building. Witness: Commissioner, John Koskinen is scheduled to testify

Wednesday, March 18, 2015; a hearing is scheduled to be held before the House Appropriations Subcommittee on Financial Services and General Government on the President's Fiscal Year 2016 funding request and budget justification for the IRS. The hearing is scheduled for 11 am, in room HT-2 of the Capitol.  
Witness: Commissioner, John Koskinen is scheduled to testify

## **Social Media**

Tumblr posts scheduled for this week:

Monday, February 23

- When Will I Get My Refund? video
- EITC
- ACA: What Employers Need to Know
- Tax Tip #24: Taxable and Non-Taxable Income

Tuesday, February 24

- Download e-Books
- Phishing/Malware video
- Taxpayer Bill of Rights #5
- Tax Tip #25: Social Security Benefits and Your Taxes

Wednesday, February 25

- Interactive Tax Assistant video
- HCTT #6
- E-File
- Tax Tip #26: Child Tax Credit

Thursday, February 26

- IRS Tax Payment Options video
- Direct Pay
- IRS2Go
- Tax Tip #27: Net Investment Income Tax

Friday, February 27

- Dirty Dozen video
- E-File
- Choosing a Preparer
- Tax Tip #28: Early Withdrawals from Retirement Plans

YouTube videos embedded on IRS.gov this week:

- When Will I Get My Refund? (ASL)

Facebook tabs for this week

- IRS2Go (ongoing)
- Return Preparer Directory (ongoing)
- VITA (ongoing)
- EITC (ongoing)
- Online Tax Help (ITA) (ongoing)
- Dirty Dozen (ongoing)

- Five Ways to Spot a Scam (ongoing)
- Taxpayer Bill of Rights (ongoing)
- ACA Pub 5187 (ongoing)
- Free File (ongoing)

## **Visual Education and Communications**

Live/Taped Broadcasts:

- N/A

Streaming Assisted Events:

- N/A

YouTube Postings

- English:
  - How To Use the Taxpayer Directory
- Spanish:
  - N/A
- ASL:
  - Get Tax Help en Español

Centra Captions:

- Chapter 22, Statue of Limitations (02/23 & 02/24)
- RA: Performance and Conduct (02/25)
- PDB Photoshop CPE (02/26)
- Chapter 17, Prohibited Transactions (02/27)

Other Projects:

- Audio Recording - ASL Tax Tips 48 (02/24)
- Avid Edit – ASL Tax Tips 48 (02/24-02/27)

Service-Wide Video Editorial Board (SVEB):

SVEB: Three video requests have been submitted to the SVEB for review and approval by the SVEB this week:

- Request #254 – IT Thank You Video Message for the Win7 Project Team
- Request #294 – HCO 2016 National Agreement Phase 2 Training
- Request #295 – TEGE Credit Counseling, Foreclosure Assistance and IRC Section 501(q) Audio Webcast

# **Communications and Liaison – Weekly Activity Report**

## **Week of March 2, 2015**

### **Internal Communications**

#### IRS Headlines

- Know the rules when volunteering at VITA and TCE sites (W&I)

#### Leaders' Alert

- New guidance on processing 1203 cases is available on iManage (HCO)
- Employees violating 1203(b) will not get performance awards (HCO)
- Designate a manager to fulfill your SETR responsibilities during your absence (AWSS)
- GovTrip unavailable for booking travel after March 31 (AWSS)

#### Daily News (webbies)

- Plan a healthy diet with these resources (HCO)
- Follow Concur and Sato TMC Fee do's and don'ts (AWSS)
- Services and Enforcement releases premiere ePublication (DCSE)

#### Poll questions

- Your friend has found a tax return preparer who charges a fee based on a percentage of the refund. What should you say? (CI)
- Which president invoked the first veto of a revenue bill in United States history? (RAS)

#### Spotlight

- Bridging the distance (communicating remotely) AWSS
- Life's too short to spend it mad (power of the positive mindset) (Multiple BUs)

### **National Media Relations**

#### News releases for week of March 2:

- Filing Season Stats
- April 1 Deadline for Required Retirement Plan Distributions
- "Tax Time Survival Guide" series kick off:
  - IRS Online Tools and Resources (3/5)
  - Free File (3/6)

#### News release possible for coming weeks:

- Unclaimed Refunds
- CI Top Ten for Identity Theft

### **National Public Liaison**

### **Legislative Affairs**

#### Upcoming Meetings:

Currently, there are no meetings scheduled.



## Upcoming Hearings:

Tuesday, March 3, 2015; a hearing is scheduled to be held before the Senate Appropriations Subcommittee on Financial Services and General Government on the President's Fiscal Year 2016 funding request and budget justification for the IRS. The hearing is scheduled for 2:30 pm, in room SD-124 of the Dirksen Senate Office Building. Witness: Commissioner, John Koskinen is scheduled to testify

Wednesday, March 18, 2015; a hearing is scheduled to be held before the House Appropriations Subcommittee on Financial Services and General Government on the President's Fiscal Year 2016 funding request and budget justification for the IRS. The hearing is scheduled for 11 am, in room HT-2 of the Capitol. Witness: Commissioner, John Koskinen is scheduled to testify

## **Social Media**

Tumblr posts scheduled for this week:

Monday, March 2

- Free File
- Interactive Tax Assistant video
- Tax Tip #29: Free File

Tuesday, March 3

- Audit Guide
- Taxpayer Bill of Rights #6
- Tax Tip #30: Unemployment Benefits

Wednesday, March 4

- Welcome to Free File video
- Health Care Tax Tip #8
- Tax Tip #31: Medical & Dental Expenses

Thursday, March 5

- Payment Alternatives Webinar
- Tax Time Survival Guide #1
- Tax Tip #32: Mortgage Debt Forgiveness

Friday, March 6

- Where's My Refund?
- Free File
- Health Care Tax Tip #9
- Tax Time Survival Guide #2
- Tax Tip #33: Education Tax Credit

YouTube videos embedded on IRS.gov this week:

- Welcome to Free File

Facebook tabs for this week

- IRS2Go (ongoing)

- Return Preparer Directory (ongoing)
- VITA (ongoing)
- EITC (ongoing)
- Online Tax Help (ITA) (ongoing)
- Dirty Dozen (ongoing)
- Five Ways to Spot a Scam (ongoing)
- Taxpayer Bill of Rights (ongoing)
- ACA Pub 5187 (ongoing)
- Free File (ongoing)

## **Visual Education and Communications**

Live/Taped Broadcasts:

- TAS IVT (03/05)

Streaming Assisted Events:

- N/A

YouTube Postings

- English:
  - How To Use the Taxpayer Directory
- Spanish:
  - N/A
- ASL:
  - N/A

Centra Captions:

- Polycom: 2016 National Agreement Manager Training-Phase 1 (03/02-03/06)
- PDB Photoshop CPE (03/03)
- Chapter 17, Prohibited Transactions (03/02)
- Effectively Collaborating with Chief Counsel (03/04)
- Private Benefit and Inurement (03/04)
- FSLG FY15 CPE – Fraud (03/05)
- 501(q) (03/05)
- FSLG FY15 CPE – FSLG Workcenter (03/05)

Other Projects:

- SBSE Payment Alternatives Webinar Taping (03/03)
- Avid Edit – ASL Tax Tips 48 (03/02-03/03)
- EITC - Helping Taxpayers Prepare For Audit – FCP Edit (03/03-03/05)
- Avid Edit - ASL SPEC Videos (03/04)

Service-Wide Video Editorial Board (SVEB):

SVEB: Five video requests have been submitted to the SVEB for review and approval by the SVEB this week:

- Request #291 – TAS TBOR Crosswalk Training for TAS Employees – Live webcast
- Request #292 – SBSE Small Business Owners: 10 Things to Ask Your Accountant Webinar
- Request #293 – SBSE Risk Management Briefing Webinar
- Request #296 – W&I Income Tax Workshop for Foreign Students

- Request #297 – C&L New Return Preparer Database video for 2015 B-roll

# **Communications and Liaison – Weekly Activity Report**

## **Week of March 16, 2015**

### **Internal Communications**

#### IRS Headlines

- IRS to pay 2014 Performance Awards on March 19 (HCO)
- File and pay your taxes on time and in full (HCO)
- Make every week Sunshine Week (PGLD)
- Get a free copy of your transcript online at IRS.gov (W&I)
- Tax withholding on awards differs than on your regular salary (AWSS)

#### Leaders' Alert

- You and your employees may be asked to share feedback to improve Performance Management system (HCO)
- Use new form when requesting interpreting services (EDI)
- Register on TEI's new website for free leadership classes (HCO)
- Know the limitations of the Family and Medical Leave Act (AWSS)
- Know what to tell your staff in a crisis (AWSS)
- How to process forgiveness of advanced leave requests for separating employees (AWSS)

#### Daily News (webbies)

- Assisting victims of tax-related identity theft (DCSE)
- Return unused funds properly when leaving the Public Transportation Subsidy Program (AWSS)
- IT Security Tip: Top 10 imposter scams of 2014 (IT)
- Safety awareness: Quick tips for preventing slips, trips and falls (AWSS)
- Commissioner Koskinen answers your questions (Comm)

#### Poll questions

- How many FOIA requests did Disclosure close in 2014? (PGLD)

#### Spotlight

- Read this (Literacy Month) (CI)

### **National Media Relations**

#### News releases for week of March 16:

- Filing Season Stats
- April 1 Deadline for Required Retirement Plan Distributions
- "Tax Time Guide" Series Continues:
  - IRAs
  - Extension
  - Payment Options/Can't Pay-File Anyway
- SBSE Webinar: Payment Alternatives

- IRS Issues 2014 Data Book

News release possible for coming weeks:

- International Individual News Release  
Avoid Common Mistakes

### **National Public Liaison**

Thursday March 19, 1 pm – Security Summit – Commissioner Koskinen and IRS executives will be meeting with CEO's of the large software companies on security issues in Room 3313 along with David Sullivan, Tax Administrator for the State of Rhode Island and Gale Garriott, Executive Director, Federation of Tax Administrators.

Tuesday March 24, 1:15 pm – Commissioner Koskinen delivers keynote speech at Tax Executives Institute Midyear Conference. Grand Hyatt, Washington, DC.

### **Legislative Affairs**

Not IRS Agency Records



Upcoming Hearings:

Wednesday, March 18, 2015; a hearing is scheduled to be held before the House Appropriations Subcommittee on Financial Services and General Government on the President's Fiscal Year 2016 funding request and budget justification for the IRS. The hearing is scheduled for 11:00 am, in room 2359 of the Rayburn House Office Building.

Witness: Commissioner, John Koskinen is scheduled to testify

### **Social Media**

Tumblr posts scheduled for this week:

Monday, March 16

- EITC video
- Health Care Tax Tip #12:
- Tax Tip #39: Itemizing vs. Standard Deduction
- Tax Time Guide: IRA Contributions

Tuesday, March 17

- IRS2Go
- Interactive Tax Assistant video
- Taxpayer Bill of Rights #8
- Tax Tip #40: Free Tax Help for the Military
- Tax Time Guide: Filing Extensions

Wednesday, March 18

- SBSE Payments Webinar
- Estimated Tax Tips
- Free File video
- Tax Tip #41: Medicare
- Tax Time Guide: Payment Options
- Health Care Tax Tip #13:

Thursday, March 19

- Amended Return
- Where's My Refund? video
- Tax Tip #42: Home Office Deduction
- Health Care Tax Tip #14:

Friday, March 20

- Free File
- Direct Pay
- Help for Taxpayers video
- Tax Tip #43: Kiddie Tax

YouTube videos embedded on IRS.gov this week:

- When Will I Get My Refund?

Rotating Spotlight changes on IRS.gov this week:

- Identity Theft
  - Combating ID theft and refund fraud
  - Taxpayer Guide to Identity Theft
  - Watch our videos on identity theft

Facebook tabs for this week

- IRS2Go (ongoing)
- Return Preparer Directory (ongoing)
- VITA (ongoing)
- EITC (ongoing)
- Online Tax Help (ITA) (ongoing)
- Dirty Dozen (ongoing)
- Five Ways to Spot a Scam (ongoing)
- Taxpayer Bill of Rights (ongoing)
- ACA Pub 5187 (ongoing)
- Free File (ongoing)

### **Visual Education and Communications**

Live/Taped Broadcasts:

- N/A

Streaming Assisted Events:

- N/A

#### YouTube Postings

- English:
  - N/A
- Spanish:
  - N/A
- ASL:
  - IRS2Go 5.0
  - Choose a Tax Preparer Wisely Directory (tentative)
  - How to Use a Tax Preparer
  - How Get Free Tax Help
  - What to Bring at Tax Time
  - Understanding Your Tax Return

#### Centra Captions:

- DS Internal Procedures Training for New AGRs (03/18)
- HCO Organizational Communications Guide/Process Training (03/19)
- All GLC Summit – Q2 (03/20)

#### Other Projects:

- Chief Counsel – Tax Practice 1 (PA) & 4 (SBSE) Taping (03/16)
- SBSE: 1504 - Risk Management (3/16-3/19)
- ASL YouTube Tax Tips – Avid Edit (03/18)

#### Service-Wide Video Editorial Board (SVEB):

SVEB: One video request has been submitted to the SVEB for review this week and has been approved by the SVEB and IRS Deputy Commissioner:

Request #300 – TEGE Unrelated Business Income Tax and Tax-Exempt Organizations Webinar using Audio Webcast

## **Communications and Liaison – Weekly Activity Report**

### **Week of March 23, 2015**

#### **Internal Communications**

##### IRS Headlines

- You may get a survey on how to improve the Performance Management system (HCO)
- Self-identifying your disability can help (EDI)
- Check diversity and inclusion calendar before scheduling meetings (EDI)

##### Leaders' Alert

- Make sure your employees understand their tax obligations (HCO)
- Reminders to help you plan employee appreciation activities (HCO)
- Manager, management official mid-year reviews due April 30 (HCO)
- Provide mailing address to ensure timely receipt of career service, performance certificates and plaques (AWSS)
- Employees may qualify for additional emergency military leave (AWSS)
- Attend a live training for managers of military employees (AWSS)

##### Daily News (webbies)

- SB/SE Collection Care Provider Project team develops a comprehensive approach to compliance (DCSE)
- Time to start thinking about summer camp options (HCO)
- HR Connect unavailable 3/27 – 3/30 (AWSS)

##### Poll questions

- What information should you not document in a potential fraud case? (SB/SE)
- The Employee Suggestion Program defines an employee suggestion as a: (HCO)

##### Spotlight

- Power foods for the brain (C&L)

#### **National Media Relations**

##### Potential News releases for week of March 23:

- 2014 annual data book released (3/24)
- Small business webinar promoted (10 things to ask your accountant) – (3/26)
- Filing season stats announced (3/26)

##### Potential News release possible for coming weeks:

- Overseas/International taxpayers' filing reminders -TBD
- Revised WOTC (Work Opportunity Tax Credit) certification form available - TBD
- Filing deadline reminders/last minute tax tips (week of 3/30)



## **National Public Liaison**

Tuesday March 24, 1:15 p.m. – Commissioner Koskinen delivers keynote speech at Tax Executives Institute Midyear Conference. Grand Hyatt.

## **Legislative Affairs**

Not IRS Agency Records



Upcoming Hearings:

Currently, there are no hearings scheduled.

## **Social Media**

Tumblr posts scheduled for this week:

Monday, March 23

- Free Webinar for Tax Practitioners
- Credits & Deductions
- Health Care Tax Tip #17
- Tax Tip #44: International Individuals

Tuesday, March 24

- Interactive Tax Assistant video
- Spanish Tumblr
- TBOR #9
- Health Care Tax Tip #15
- Tax Tip #45: Employee Business Expenses

Wednesday, March 25

- Free File
- SBSE Webinar
- eBooks
- Health Care Tax Tip #16
- Tax Tip #46: Farm Income & Deductions

Thursday, March 26

- ACA Preparing for 2014
- When Will I Get My Refund? video
- EITC
- Tax Tip #47: Charitable Contributions

Friday, March 27

- ACA Large Employers

- IRS2Go video
- Dirty Dozen
- Tax Tip #48: Tax-Time Errors to Avoid

YouTube videos embedded on IRS.gov this week:

- When Will I Get My Refund?

Facebook tabs for this week

- IRS2Go (ongoing)
- Return Preparer Directory (ongoing)
- VITA (ongoing)
- EITC (ongoing)
- Online Tax Help (ITA) (ongoing)
- Dirty Dozen (ongoing)
- Five Ways to Spot a Scam (ongoing)
- Taxpayer Bill of Rights (ongoing)
- ACA Pub 5187 (ongoing)
- Free File (ongoing)

## **Visual Education and Communications**

Live/Taped Broadcasts:

- CI Virtual Town Hall Meeting Live Stream w/Polycom (03/23)
- LB&I - Frontline Managers Webcast Session Stream w/Polycom (03/24)
- LB&I - All Employees Webcast Stream w/Polycom - Session 1 (03/25)
- LB&I - All Employees Webcast Stream w/Polycom - Session 2 (03/25)

Streaming Assisted Events:

- N/A

YouTube Postings

- English:
  - N/A
- Spanish:
  - N/A
- ASL:
  - N/A

Centra Captions:

- HCO: Organizational Communications Guide/Process Training (03/24)
- EDI: Reasonable Accommodations and FMLA (03/25)
- Audit Hour - Employment Tax Fringe Benefit (03/27)

Other Projects:

- English YouTube Taping (03/24)
- EITC - Helping Taxpayers Prepare For Audit – FCP Edit (03/24-03/26)
- SBSE Risk Management Webinar - Streaming/Broadcast (03/27)

Service-Wide Video Editorial Board (SVEB):

SVEB: Four video requests have been submitted to the SVEB for review and approval by the SVEB this week:

- YT Request #62 – LB&I 2015 International Individual Taxpayer Assistance Program YouTube Video Series
- Request #301 – NPL Commissioner Koskinen Video Greeting– American Payroll Association Congress
- Request #302 – NPL Commissioner Koskinen Video Keynote -- Latino Tax Pros National Convention

Request #303 – LB&I Concept of Operations E-Town halls

# **Communications and Liaison – Weekly Activity Report**

## **Week of March 30, 2015**

### **Internal Communications**

#### IRS Headlines

- Use IRS electronic payment options to pay your taxes (W&I)
- IRS releases 2015 Allowable Living Expense standards (SB/SE)
- You now have a new way to save for retirement (HCO)

#### Leaders' Alert

- Reminder: Timely PAR actions (HCO)
- Pay cap limitation – Watch for email reminders (AWSS)

#### Daily News (webbies)

- The science behind the National Forensic Laboratory (DCSE)
- Are you an IRS employee born after 1990? (C&L)
- Has your computer stopped auto-filling passwords? (IT)

#### Poll Questions

- As an IRS employee, you've noticed that friends frequently post tax-related questions to your social media sites. What's the best way to respond? (C&L)
- Which filing season was the first for the IRS-sponsored volunteer program, Volunteer Income Tax Assistance (VITA)? (RAS)

#### Spotlight

- Reel life (a passion for filmmaking) (CI)
- Inside edition (IRS Data Book) (RAS)

### **National Media Relations**

#### Potential News releases for week of March 30:

- Don't get fooled by a tax scam (3/31)
- IRPAC solicits new embers (4/2)
- Filing season stats announced (4/2)

#### Potential News release possible for coming weeks:

- Extensions and payment options – week of 4/6
- Last minute filing reminders–week of 4/6
- Overseas/International taxpayers' filing reminders -TBD
- Revised WOTC (Work Opportunity Tax Credit) certification form available - TBD

### **Field Media Relations**

## Tax Tips

- 3/30/15, TT-2015-49, Your Tax Refund and Offsets to Pay Your Unpaid Debts
- 3/31/15, TT-2015-50, Still Time to Make Your IRA Contribution for the 2014 Tax Year
- 4/01/15, TT-2015-51, Seven Tips to Help You Determine if Your Gift is Taxable
- 4/02/15, TT-2015-52, Bartering Income: The Value of Property or Services You Receive
- 4/03/15, TT-2015-53, File on Time Even if You Can't Pay

## **National Public Liaison**

### **Legislative Affairs**

Not IRS Agency Records



#### Upcoming Hearings:

On Wednesday, April 15, 2015, a hearing is scheduled to be held before the Senate Homeland and Governmental Affairs Committee on ACA implementation. The hearing is tentatively scheduled for 10:00 am, room number and location TBD.

Witness: Commissioner, John Koskinen is scheduled to testify

## **Social Media**

Tumblr posts scheduled for this week:

Monday, March 30

- Get Tax Help en Espanol video
- Small Business Webinar
- Dirty Dozen: Phishing
- Health Care Tax Tip #18
- Tax Tip #49: Tax Refund Offsets

Tuesday, March 31

- First Time Filing a Tax Return?
- Direct Pay
- Direct Deposit
- Taxpayer Bill of Rights #10
- Tax Tip #50: IRA Contributions

Wednesday, April 1

- Scams: Don't Be Fooled
- Injured Spouse Tax Relief
- Tax Preparer Directory
- Dirty Dozen: Phone Scams
- Tax Tip #51: Gift Tax

Thursday, April 2

- Welcome to Free File video
- Amended Return
- EITC
- Interactive Tax Assistant
- Tax Tip #52: Bartering

Friday, April 3

- Tax Scams video
- Filing Deadline Reminder
- Savings Bonds
- Forms and Publications
- Health Care Tax Tip #20
- Tax Tip #53: Need More Time to Pay Taxes

YouTube videos embedded on IRS.gov this week:

- When Will I Get My Refund? (ASL)

Facebook tabs for this week

- IRS2Go (ongoing)
- Return Preparer Directory (ongoing)
- VITA (ongoing)
- EITC (ongoing)
- Online Tax Help (ITA) (ongoing)
- Dirty Dozen (ongoing)
- Five Ways to Spot a Scam (ongoing)
- Taxpayer Bill of Rights (ongoing)
- ACA Pub 5187 (ongoing)
- Free File (ongoing)

## **Visual Education and Communications**

Live/Taped Broadcasts:

- Commissioner's Virtual Town Hall – Employee Session 2 (Greensboro, NC) Live Stream w/Polycom (04/02)
- Commissioner's Virtual Town Hall – Managers Session 2 (Greensboro, NC) Live Stream w/Centra/Polycom (04/02)

Streaming Assisted Events:

- N/A

YouTube Postings

- English:
  - N/A
- Spanish:
  - N/A
- ASL:
  - Gift Tax

Centra Captions:

- Resume Writing (03/31)
- FSLG FY15 CPE: Customer Satisfaction Survey (04/02)
- FSLG FY15 CPE: Consolidated Case Closing Guide (04/02)

Other Projects:

- Studio Maintenance Day (03/30)
- English YouTube Tax Tips Edit (03/30-04/02)
- Test Polycom/Stream for Terry for Commissioner Polycom (04/01)
- Chief Counsel – Tax Practice 2 (International/Offshore) & 3 Taping (04/02)

Service-Wide Video Editorial Board (SVEB):

- N/A

## **Communications and Liaison – Weekly Activity Report Week of April 06, 2015**

### **Internal Communications**

#### Commissioner News

- Koskinen conducts virtual town hall with Greensboro employees

#### IRS Headlines

- Records and Information Management Month serves as reminder to clean your files (PGLD)
- Pay cap limitation – Watch for email reminders (AWSS)
- Look for changes to your Statement of Earnings and Leave (AWSS)
- Don't commit UNAX: Use account management tools appropriately (PGLD)

#### Leaders' Alert

- Driver safety training – remind employees of criteria (AWSS)
- Free training on electronic research tools available (RAS)
- You can help your employees avoid administrative debt (AWSS)
- Separating Employee Clearance conference calls scheduled for April, May and June (AWSS)

#### Poll Questions

- The IRS tax calendar for businesses and self-employed taxpayers can be printed from which electronic calendar? (SBSE)

#### Spotlight

- Making fitness fun (Multiple)

#### Daily News

- Online Services delivers easier payment transactions with IRS Direct Pay (DCSE)
- Incident reporting—it's your responsibility (AWSS)
- Taxpayer Bill of Rights fact sheets available (C&L)

### **National Media Relations**

#### News releases for week of April 6:

- CI Annual Report (4/7)
- Avoid Long Lines (4/8)
- Extensions & payment options/filing season stats (4/9)
- Last minute tips (4/10)

#### News release possible for coming weeks:

- Work opportunity Tax Credit extended (TBD)



## **Field Media Relations**

### Tax Tips

4/06/15, TT-2015-54, Five Key Tax Tips about Tax Withholding and Estimated Tax

4/07/15, TT-2015-55, IRS.gov: Simply the Best Place to Get Tax Help

4/08/15, TT-2015-56, Save on Your Taxes and for Retirement with the Saver's Credit

4/09/15, TT-2015-57, Ways to Pay Your Tax Liability

4/10/15, TT-2015-58, Last-Minute Filing Tips

## **National Public Liaison**

## **Legislative Affairs**

Not IRS Agency Records



### Upcoming Hearings:

On Wednesday, April 15, 2015, a hearing is scheduled to be held before the Senate Homeland and Governmental Affairs Committee on ACA implementation. The hearing is tentatively scheduled for 10:00 am, room number and location TBD.

Witness: Commissioner, John Koskinen is scheduled to testify

## **Social Media**

Tumblr posts scheduled for this week:

Monday, April 6

- File for an Extension
- Calling the IRS? Visit IRS.gov
- Tax Payment Options video
- Tax Time Guide: Contribute to an IRA
- Tax Tip #54: Estimated Taxes

Tuesday, April 7

- Where's My Refund? video
- Dirty Dozen: Fake Charities
- Get Connected with IRS Social Media
- Health Care Tax Tip #21
- Tax Tip #55: How to Get Help

Wednesday, April 8

- Amended Returns
- Free File
- Interactive Tax Assistant video
- Credits & Deductions
- Filing Deadline Reminder
- Tax Tip #56: Making Federal Tax Payments

Thursday, April 9

- Phone Scams
- IRS2Go
- FATCA
- Help for Taxpayers video
- Tax Tip #57: Bartering

Friday, April 10

- ACA Individual Shared Responsibility Payment
- Need Payment Options
- Get Tax Help with ITA
- Forms & Publications
- Filing Deadline Reminder
- Tax Tip #58: Tips for Last Minute Filers

YouTube videos embedded on IRS.gov this week:

- When Will I Get My Refund?

Facebook tabs for this week

- Payment Options (new)
- Amended Returns (new)
- Extensions (new)
- IRS2Go (ongoing)
- Return Preparer Directory (ongoing)
- VITA (ongoing)
- EITC (ongoing)
- Online Tax Help (ITA) (ongoing)
- Five Ways to Spot a Scam (ongoing)
- Taxpayer Bill of Rights (ongoing)
- ACA Pub 5187 (ongoing)
- Free File (ongoing)

### **Visual Education and Communications**

Live/Taped Broadcasts:

- TAS TBOR IVT (04/06)

- Chief Counsel – Tax Practice 1 Streaming(04/08)

Streaming Assisted Events:

- N/A

YouTube Postings

- English:
  - Owe Taxes But Can't Pay
- Spanish:
- ASL:
  - N/A

Centra Captions:

- HCO Organizational Communications Guide/Process Training (04/08)
- Pre Open Enrollment Session (04/09)

Other Projects:

- English YouTube Tax Tips Edit (04/06-04/10)
- ASL TT-49 Taping (04/07)
- Chief Counsel Tax Practices - Avid Edit (04/07-04/08)
- Spanish YouTube Edit (04/08-04/10)
- ASL TT-49 Avid Edit (04/08-04/10)
- Commissioner Video Tappings (04/09)
- ASL TT-49 Voice Over Audio Recording (04/09)

Service-Wide Video Editorial Board (SVEB):

SVEB: Five Video Requests were reviewed and approved by the SVEB this week. We are waiting Deputy Commissioner approval.

- AMENDED Request #267 – TEGE Taxability of Fringe Benefits Part 1: What Is A Fringe Benefit and When Is It Taxable? Web Interpoint session
- AMENDED Request #268 – TEGE Taxability of Fringe Benefits Part 2: Commonly Provided Fringe Benefits Web Interpoint session
- AMENDED Request #269 – TEGE Taxability of Fringe Benefits Part 3: Other Compensation and Payments To Employees Web Interpoint session
- AMENDED Request #298 – TEGE Taxability of Lawsuits and Settlements Web conference using Web Interpoint
- Request #304 – IT Accomplishments Video Message

## **Communications and Liaison – Weekly Activity Report Week of April 13, 2015**

### **Internal Communications**

Commissioner all-employee email

- A strong finish to the filing season

IRS Headlines

- Review your Personal Benefits Statement for 2014 (AWSS)
- Avoid UNAX: Know what is and isn't a covered relationship (PGLD)
- Take a virtual tour of IRS University (HCO)
- Help the Enterprise Service Desk help you (IT)

Leaders' Alert

- Boost engagement in your team (HCO)
- Save the date for upcoming mandatory training on 2016 National Agreement (HCO)
- Regularly update HR Connect information to save time, ensure security (AWSS)
- New health and life insurance certification forms available for seasonal employees (AWSS)

Poll Questions

- Who was (b) (6) and what did he do for the IRS? (CI)

Spotlight

- Matters of health (HCO)

Daily News

- IT Security Tip: So I may have a virus, now what? (IT)
- Review your Occupant Emergency Plan (AWSS)
- You can embrace change by connecting with your coworkers (EDI)

### **National Media Relations**

News releases for week of April 13:

- Last-Minute Reminders for Those Who Haven't Filed (Monday)
- As the Tax Season ends, IRS Answers: Where's My Refund? (Tuesday)
- Work opportunity Tax Credit Extended (Thursday)

News release possible for coming weeks:

- End of Filing Season Statistics

### **Field Media Relations**

Tax Tips:

4/13/15, TT-2015-59, Five Things to Know if You Need More Time to File Your Taxes

4/14/15, TT-2015-60, IRS Issues the Top 10 Tax Time Tips

4/15/15, TT-2015-61, A Dozen Key Points about Paying Your Taxes

4/16/15, TT-2015-62, If You Missed the Tax Deadline These Tips Can Help

4/17/15, TT-2015-63, What to Know about Late Filing and Late Paying Penalties

### **National Public Liaison**

Relationship Management Branch

Thurs. April 16, 4 p.m. – Weekly ACA conference call with association partners.

### **Legislative Affairs**

Not an IRS Agency Record



Upcoming Hearings:

On Wednesday, April 15, 2015, a hearing is scheduled to be held before the Senate Homeland and Governmental Affairs Committee on ACA implementation. The hearing is scheduled for 10:00 am, in room 342 of the Dirksen Senate Office Building.

Witness: Commissioner, John Koskinen is scheduled to testify

On Wednesday, April 22, 2015, a hearing is scheduled to be held before the Subcommittee on Oversight, House Ways and Means Committee on the 2015 filing season. The hearing time is TBD, in room 1100 of the Longworth House Office Building.

Witness: Commissioner, John Koskinen is scheduled to testify

### **Social Media**

Tumblr posts scheduled for this week:

Monday, April 13

- Filing Deadline Reminder
- Free Help Preparing Your Return video
- IRS2Go
- Tax Tip #59: Extensions

Tuesday, April 14

- Filing an Extension

- Direct Pay
- Payment Options video
- Tax Tip #60: Top 10 Tax Time Tips

Wednesday, April 15

- Filing Reminder
- Free File
- ACA: Preparing Your 2014 Return
- Filing Extensions
- Direct Deposit
- Tax Tip #61: Paying Your Taxes

Thursday, April 16

- Don't Be Fooled
- Calling the IRS
- Interactive Tax Assistant video
- Health Care Tax Tip #22
- Tax Tip #62: Missed Income Deadline

Friday, April 17

- Free File
- Amended Returns
- Where's My Refund? video
- Payment Options
- Tax Tip #63: Late Filing and Late Payments

YouTube videos embedded on IRS.gov this week:

- Need More Time to File?

Facebook tabs for this week

- Payment Options (ongoing)
- Amended Returns (ongoing)
- Extensions (ongoing)
- IRS2Go (ongoing)
- Return Preparer Directory (ongoing)
- Five Ways to Spot a Scam (ongoing)
- Taxpayer Bill of Rights (ongoing)
- ACA Pub 5187 (ongoing)
- Free File (ongoing)

### **Visual Education and Communications**

Live/Taped Broadcasts:

- Chief Counsel – Tax Practice 2 Streaming (04/15)
- Chief Counsel – Tax Practice 1 Streaming Rebroadcast (04/16)

Streaming Assisted Events:

- N/A

YouTube Postings

- English:
  - Owe Money but Can't Pay
- Spanish:
  - N/A
- ASL:
  - N/A

Centra Captions:

- HCO Organizational Communications Guide/Process Training (04/14)
- Reasonable Accommodations for EEO Professionals (04/15)

Other Projects:

- ASL Tax Tips - YouTube Avid Edit (04/13-04/14)
- Chief Counsel - Tax Practices IVT – Final Cut Pro Edit (04/13-04/14)
- English YouTube – Final Cut Pro Edit (04/14-04/15)
- Commissioner Video Tappings (04/16)

Service-Wide Video Editorial Board (SVEB):

SVEB: Four video requests have been submitted to the SVEB for review and approval by the SVEB this week:

- YouTube Request #63 – IRS 2015 Tax Forums YouTube Video
- Request #306 – AD Town hall Meeting – June 11, 2015
- Request #307 – W&I AOTC Video

Request #308 – W&I Earned Income Tax Credit (EITC) Due Diligence Video

# **Communications and Liaison – Weekly Activity Report**

## **Week of April 20, 2015**

### **Internal Communications**

Commissioner all-employee email

- Commissioner's Awards will honor exceptional achievements

IRS Headlines

- Find training and resources to help you succeed (HCO)
- Know how to make Public Transportation Subsidy Program changes (AWSS)

Leaders' Alert

- Show support for your fellow employees during Public Service Recognition Week, May 3-9 (HCO)
- Possible formatting issue with ePerformance narratives (AWSS)
- Commissioner's Awards will honor exceptional achievements (Comm)

Other News

- 4/15 as tax deadline day just celebrated 60th anniversary (C&L)

Poll Questions

- What action can you take on the Employee Personal Page? (AWSS)
- Who declared the first National Secretaries Week in 1952? (W&I)

Spotlight

- All in a day's work (Administrative Professionals Week) (Multiple)

Daily News

- Use the first-time user job aid to register in Concur (AWSS)
- Add your Concur password to the Reduced SmartID Sign-on list (AWSS)

### **National Media Relations**

News releases for week of April 20:

- Work Opportunity Credit relief – additional time to file new Form 8850 (4/22)

News release possible for coming weeks:

- End of Filing Season Results
- IRS Seeking Applicants for IRSAC
- Small Business Resources Available on IRS.gov

### **Field Media Relations**

Tax Tips:



4/20/15, TT-2015-64, Tips for Filing an Amended Return

4/21/15, TT-2015-65, Top 10 Tips to Know if You Get a Letter from the IRS

4/22/15, TT-2015-66, How Does the Taxpayer Advocate Service Work for You?

4/23/15, TT-2015-67, Start Planning Now for Next Year's Taxes

### **National Public Liaison**

There will be two working sessions on the Commissioner's Security Summit follow-up:

1. Wednesday, April 22<sup>nd</sup> at the Federation of Tax Administrators, representatives from industry, the states and IRS will meet in the Information Sharing sub-group.
2. Thursday, April 23<sup>rd</sup> at IRS in Washington, DC, representatives from industry, the states and IRS will meet in the Authentication sub-group.

Stakeholder Relationship Management Branch:

Tuesday, April 28<sup>th</sup> – Wednesday, April 29<sup>th</sup> – Information Reporting Program Advisory Committee (IRPAC) meets for working session at IRS headquarters.

### **Legislative Affairs**

Upcoming Meetings:

Currently, there are no meetings scheduled.

Upcoming Hearings:

On Wednesday, April 22, 2015, a hearing is scheduled to be held before the Subcommittee on Oversight, House Ways and Means Committee on the 2015 filing season. The hearing is scheduled for 10:00 am, in room 1100 of the Longworth House Office Building.

Witness: Commissioner, John Koskinen is scheduled to testify

### **Social Media**

Tumblr posts scheduled for this week:

Monday, April 20

- Where's My Refund? video
- Health Care Tax Tip #22
- Tax Tip #64: Amended Returns

Tuesday, April 21

- Amended Return
- Health Care Tax Tip #23
- Tax Tip #65: IRS Notice

Wednesday, April 22

- Don't Be Fooled...
- Earth Day
- Tax Tip #66: Taxpayer Advocate

Thursday, April 23

- IRS2Go video

- Direct Pay
- Check Your Withholding
- Tax Tip #67: Next Year's Tax Return

Friday, April 24

- Do-It-Yourself Free Tax Help
- Get Connected with IRS Social Media
- Health Care Tax Tip #24

YouTube videos embedded on IRS.gov this week:

- Where's My Refund?

Facebook tabs for this week

- Payment Options (ongoing)
- Amended Returns (ongoing)
- Extensions (ongoing)
- IRS2Go (ongoing)
- Five Ways to Spot a Scam (ongoing)
- Taxpayer Bill of Rights (ongoing)
- ACA Pub 5187 (ongoing)
- Free File (ongoing)

## **Visual Education and Communications**

Live/Taped Broadcasts:

- Chief Counsel – Tax Practice 3 Streaming (04/22)
- Chief Counsel – Tax Practice 2 Streaming Rebroadcast (04/23)

Streaming Assisted Events:

- N/A

YouTube Postings

- English:
  - ITIN
- Spanish:
  - Owe Taxes But Can't Pay
- ASL:
  - Owe Taxes But Can't Pay
  - How To Request A Copy Of Your Tax Return
  - Individual Identification Number

Centra Captions:

- Highly Overview of the IDO Internal RA Procedures Training for New RACs (04/21)
- Collecting Medical Documentation Training for New RACs (04/21)
- Alerts and Framing the Case Training for New RACs (04/22)
- Embracing Change: Connect (04/22)
- SharePoint Site Upload Training for New RACs (04/23)
- PDB: Print This, Not That: Color Schemes (04/23)
- Mid-Year Message (04/24)

Other Projects:

- HCO-1501-1: National Agreement Edit (04/17)
- HCO-1501-2: Employee Engagement Edit (04/18)
- HCO-1501-3: Intro to Manager's CPE Edit (04/20)
- New Employee Orientation Edit (04/20-04/21)
- Commissioner's Video Edit - Geographic Leadership Communities and New Manager Orientation – Final Cut Pro Edit (04/21- 04/22)
- APA Latino Tax Professionals – Final Cut Pro Edit (04/23)

Service-Wide Video Editorial Board (SVEB):

SVEB: Five video requests were reviewed by the SVEB this week and are pending DCOS approval:

- Request #309 - Affordable Care Act: Employer Shared Responsibility and Information Reporting April 2015 Webinterpoint Sessions
- Request #310 – TEGE Backup Withholding and Form 1099 Miscellaneous Webinar using Audio Webcast
- Request #311 – TEGE Accumulated Sick and Leave Pay for Retiring Employees – When is it Taxable? Webinar using Audio Webcast
- Request #313 – Chief Counsel SBSE Commissioner Welcome Video Message for Chief Counsel CLE Program
- Request #314 – Affordable Care Act Information Returns monthly outreach to software developers (total of 9 Webinterpoint sessions)

# **Communications and Liaison – Weekly Activity Report**

## **Week of April 27, 2015**

### **Internal Communications**

#### Commissioner News

- Acting Deputy Commissioner walks in the shoes of IT Support (DCOS)

#### Employee Email

- Take the Federal Employees Viewpoint Survey (Comm)

#### IRS Headlines

- Recognize outstanding employees for Public Service Recognition Week (HCO)
- Gender Identity Awareness training available on ELMS (EDI)
- Employee debt information added to the Employee Personal Page (AWSS)
- Certain photos of political candidates violate Hatch Act (Counsel)

#### Leaders' Alert

- Encourage your employees to take the Federal Employee Viewpoint Survey (HCO)
- Use new time code for knowledge management activities (HCO)
- Attend Live Meeting webinar to increase communications in your workgroup (HCO)
- Employees who self-input their time aren't required to submit timesheets (AWSS)
- Complete phase one 2016 National Agreement ELMS training for managers (HCO)
- Servicewide Blanket Purchase Agreements awarded for non-IT consulting services (RAS)
- Don't sign documents that contain incorrect Centrally Billed Account charges (AWSS)

#### Poll Questions

- Which of the following will you find on IT4U? (IT)

#### Spotlight

- It runs in the family (IRS families)

#### Webbie

- Use fillable form to apply for hardship relocation (HCO)

### **National Media Relations**

#### Possible news releases for week of April 27:

- Many Tax-Exempt Organizations Must File with IRS by May 15 to Preserve Tax-Exempt Status (TBD)

- IRS Seeks Applications for the Internal Revenue Service Advisory Council (Wednesday)

Possible news release possible for coming weeks:

- Small Business Week, IRS Features Popular Products for Entrepreneurs (Monday)
- Special Penalty Relief Available to Small Retirement Plans that File by June 2
- Reminder of June 15 deadline for individual taxpayers living abroad

### **National Public Liaison**

Tuesday April 28 - Wednesday April 29 – Information Reporting Program Advisory Committee (IRPAC) meets for working session at IRS headquarters.

Thursday May 7 – SBSE Commissioner Karen Schiller, W&I Commissioner Debra Holland and other IRS executives speak at the AICPA IRS Advocacy & Relations Committee Meeting. Washington.

Friday May 8 – Commissioner Koskinen's video greeting to the American Payroll Association is screened at the APA Congress (Las Vegas).

### **Legislative Affairs**

Upcoming Meetings:

Currently, there are no meetings scheduled.

Upcoming Hearings:

Currently, there are no hearings scheduled.

### **Social Media**

Tumblr posts scheduled for this week:

Monday, April 27

- Amended Returns
- Dirty Dozen (generic)
- IRS on Social Media

Tuesday, April 28

- ACA: Employer Health Coverage
- Where's My Refund? video

Wednesday, April 29

- Estimated Tax Payments
- IRS2Go Stay Connected
- Online Tax Calendar video

Thursday, April 30

- PreparAthon Day
- FATCA
- Three Ways to Search IRS.gov

Friday, May 1

- Do-It-Yourself Free Tax Help
- IRS eBooks
- Spanish Tumblr
- Employer or Independent Contractor?

YouTube videos embedded on IRS.gov this week:

- Small Tax-Exempts Annual Reporting Reminder

Facebook tabs for this week

- Payment Options (ongoing)
- Amended Returns (ongoing)
- Extensions (ongoing)
- IRS2Go (ongoing)
- Five Ways to Spot a Scam (ongoing)
- Taxpayer Bill of Rights (ongoing)
- ACA Pub 5187 (ongoing)
- Free File (ongoing)

## **Visual Education and Communications**

Live/Taped Broadcasts:

- Chief Counsel – Tax Practice 4 Streaming (04/29)
- Chief Counsel – Tax Practice 3 Streaming Rebroadcast (04/30)

Streaming Assisted Events:

- N/A

YouTube Postings

- English:
  - How to Request a Copy of Your Tax Return
- Spanish:
  - N/A
- ASL:
  - N/A

Centra Captions:

- How to Facilitate the RA Interview Training for New RACs (04/28)
- Tip Compliance Assignment Training (04/29)
- Accommodating Employees with Epilepsy (04/29)

Other Projects:

- Chief Counsel - Ethics Vignettes Taping (04/27)
- English YouTube - Products for Taxpayers Who are Visually Impaired Final Cut Pro Edit (04/28-05/01)
- English YouTube - How to Request a Copy of Your Tax Return Final Cut Pro Edit (04/28-05/01)
- Chief Counsel Tax Practices IVT (04/29)
- EITC Final Cut Pro Edit (04/29)
- Chief Counsel - Ethic Program Taping (04/30)

Service-Wide Video Editorial Board (SVEB):

Twelve Video Requests are being reviewed this week by the SVEB:

- Request #315 – TEGE Recordkeeping and Disclosure for Exempt Organizations Web conference using Webinterpoint
- Request #316 – TEGE 501(c)(7) Social Clubs: What they need to qualify for and maintain tax-exempt status Web conference using Webinterpoint
- Request #317 - Affordable Care Act: Information Reporting by Employers (§6056) Recorded Webinar using Webinterpoint and AT&T phone line
- Request #318 - Affordable Care Act: Employer Shared Responsibility Provision §4980H Recorded Webinar using Webinterpoint and AT&T phone line
- Request #319 Affordable Care Act: Employer Shared Responsibility and Information Reporting Audio Webinar with Q&A Webinar chat
- Request #320 – ACA: Information Reporting by Providers of Minimum Essential Coverage (MEC) (§6055) Recorded Webinar using Webinterpoint, and AT&T phone line
- Request #321 – SBSE Affordable Care Act (ACA) video for Revenue Officers CPE
- Request #322 – EDI Employee Organization IRS Commissioner Video
- Amended Request #267– TEGE Taxability of Fringe Benefits-Part 1: What Is A Fringe Benefit and When Is It Taxable? Audio Webcast
- Amended Request #268– TEGE Taxability of Fringe Benefits-Part 2: Commonly Provided Fringe Benefits Audio Webcast
- Amended Request #269– TEGE Taxability of Fringe Benefits-Part 3: Other Compensation and Payments To Employees Audio Webcast
- Amended Request #298– TEGE The Taxability of Lawsuits and Settlements Audio Webcast

## **Communications and Liaison – Weekly Activity Report Week of May 4, 2015**

### **Internal Communications**

Employee Email:

- Public Service Recognition Week (Comm)

Manager email:

- Deputy Commissioners encourage participation in Managers Continuing Professional Education Program (HCO)
- Ways to celebrate your team this Public Service Recognition Week (Comm)

IRS Headlines:

- Receive up to 70 percent off tuition at Champlain College (HCO)
- Federal Employee Viewpoint Survey kicks off this week (HCO)
- Seasonal employees can use pay statements to validate income (AWSS)
- Validate your time and attendance to ensure accuracy (AWSS)

Leaders' Alert:

- Complete separation actions promptly when employees leave IRS (AWSS)
- Document seasonal employees' requests to stay in non-pay status (AWSS)
- Don't modify workplace security features without approval (AWSS)
- Look to Elements of Training newsletter for latest training opportunities (HCO)

Spotlight:

- Service, near and far (Public Service Recognition Week) (LB&I)
- Taking the lead (leading by example) (W&I)

Poll Question:

- When did the IRS first publish, "Your Rights as a Taxpayer," also known as Publication 1? (RAS)

Webbies:

- Be careful when you amend your travel authorizations (AWSS)
- IRS centralizes the work of helping victims of ID theft (Multiple)
- IT Security Tip: Are you safe online? (IT)
- Commissioner representatives have your back during any emergencies at your office (AWSS)



- Learn how to access library of e-books, videos from your laptop (HCO)

## **National Media Relations**

### **National Public Liaison**

Stakeholder Relationship Management Branch:

Thursday May 7 – AICPA IRS Advocacy & Relations Committee all-day meeting. Debra Holland, Karen Schiller and other IRS executives will address the group.

Friday May 8 – Commissioner Koskinen's video greeting broadcast at American Payroll Association Congress in Las Vegas.

Liaison and Tax Forums Branch:

IRSAC announced its open season for new members on May 1<sup>st</sup>. Individuals who bring substantial, disparate experience and diverse backgrounds from the taxpaying public, the tax professional community, small and large businesses, state tax administration, and the payroll community on the Council's activities are sought. The current advisory committee will have its second working session meetings on May 5<sup>th</sup> and 6<sup>th</sup> at Main IRS.

### **Legislative Affairs**

Upcoming Meetings:

Currently, there are no meetings scheduled.

Upcoming Hearings:

Currently, there are no hearings scheduled.

### **Social Media**

Tumblr posts scheduled for this week:

Monday, May 4

- Small Business Tax Center
- Freelance Income
- Direct Pay
- IRS Video Portal
- Public Service Recognition Week (via Thunderclap)

Tuesday, May 5

- Small Business Tax Center
- Freelance Income
- Basics of Indoor Tanning Services Excise Tax video

Wednesday, May 6

- Small Business Week
- Employee vs. Independent Contractor
- Small Business Health Care Tax Center video

Thursday, May 7

- May 15 Deadline
- IRS Video Portal
- Online Tax Calendar video
- Small Business Tax Center

Friday, May 8

- Freelance Income
- Small Business Tax Center
- IRS Video Portal
- Small Business Week

YouTube videos embedded on IRS.gov this week:

- IRS Online Tax Calendar

Facebook tabs for this week

- Small Business Week (new)
- Payment Options (ongoing)
- Amended Returns (ongoing)
- Extensions (ongoing)
- IRS2Go (ongoing)
- Five Ways to Spot a Scam (ongoing)
- Taxpayer Bill of Rights (ongoing)
- ACA Pub 5187 (ongoing)
- Free File (ongoing)

## **Visual Education and Communications**

Live/Taped Broadcasts:

- Criminal Investigation Virtual Town Hall Meeting Live Stream w/Polycom (05/04)
- Chief Counsel Ethics Streaming - (05/06)
- Chief Counsel – Tax Practice 4 Streaming Rebroadcast (05/07)

Streaming Assisted Events:

- N/A

YouTube Postings

- English:
  - N/A
- Spanish:
  - N/A
- ASL:
  - N/A

Centra Captions:

- FSLG FY15 CPE: Effectively Collaborating with Counsel (05/07)

Other Projects:

- EITC Final Cut Pro Edit (05/04-05/05)

- English YouTube - How to Request a Copy of Your Tax Return Final Cut Pro Edit (05/05-05/08)
- English YouTube - Products for Taxpayers Who are Visually Impaired - Final Cut Pro Edit
- TAS - AJAC: New Appeals Process Taping (05/06)
- English YouTube Taping (05/07)

Service-Wide Video Editorial Board (SVEB):

3 Video Requests are pending Deputy Commissioner approval this week. The Video Request are:

- Request #93 – W&I Welcome to Free File April 2015 Videos.
- Request #176 – SBSE Circular 230 Webinar
- Request #323 – IRS Nationwide Tax Forums Online (NTFO) 2015 Videos

# **Communications and Liaison – Weekly Activity Report**

## **Week of May 11, 2015**

### **Internal Communications**

Commissioner news:

- Commissioner meets virtually with Pittsburgh employees (Comm)

Manager email:

- Deputy Commissioners encourage participation in Managers Continuing Professional Education Program (HCO)

IRS Headlines:

- Evaluate your tax withholding now for 2015 (HCO)
- Where's My Amended Return? Find out on IRS.gov (W&I)
- IRS, NTEU work together to create new Federal Employee Viewpoint Survey questions (HCO)
- IRS employees may qualify for student loan forgiveness (AWSS)

Leaders' Alert:

- Reminder: Complete Enterprise Risk Management training by May 29 (ERMO)
- New data loss prevention tool to be implemented May 19 (Multiple)
- Attend May 28 webinar for ideas on leading remote-office employees (HCO)
- Review tips for timely processing retirement actions. (AWSS)

Spotlight:

- Keeping the Filipino heritage alive (Asian Pacific Heritage Month) (EDI)
- Detailed oriented (Servicewide detail opportunity register) (HCO)

Other News

- W&I's Debra Holland recognized with a 2014 Presidential Meritorious Rank Award (C&L)
- Seven IRS executives recognized with Treasury Leadership Legacy Honors (C&L)

Poll Question:

- Which of these "go green" efforts reduce printing costs? (IT)

Webbies:

- What's the best time to take Concur training? (AWSS)

Learn about "covering," the silent killer of inclusion 5/14 (EDI)

### **National Media Relations**

News releases for week of May 11:

- No releases scheduled for the week

News release possible for coming weeks:

- Phone scam reminder
- Tax information for military and veterans
- Reminder of June 15 deadline for individual taxpayers living abroad

### **National Public Liaison**

Scheduled to be held is a follow-up meeting of the Security Summit group on Wednesday, May 13, 2015, at the Crystal Gateway Marriott Hotel.

### **Legislative Affairs**

Upcoming Meetings:

Currently, there are no meetings scheduled.

Upcoming Hearings:

Currently, there are no hearings scheduled.

### **Social Media**

Tumblr posts scheduled for this week:

Monday, May 11

- How to Request a Copy of Your Tax Return video
- Tax Info for the US Armed Forces
- Five Easy Ways to Spot a Phone Scam

Tuesday, May 12

- Small Tax-Exempts Reporting reminder video
- IRS Select Check Tool
- Health Care Tax Tip #29

Wednesday, May 13

- Form 5500-EZ Pilot Penalty Relief Program video
- Health Care Tax Tip #30
- Military Tax Tips video

Thursday, May 14

- When Will I Get My Refund? video
- May 15 Filing Deadline
- Audit Guide

Friday, May 15

- Tax Payment Options video
- Victims of Terrorist Attacks Tax Relief
- May 15 Deadline

YouTube videos embedded on IRS.gov this week:

- Small Tax-Exempts Annual Reporting Reminder

Facebook tabs for this week

- Military Tax Tips (new)
- Payment Options (ongoing)
- Amended Returns (ongoing)
- Extensions (ongoing)
- IRS2Go (ongoing)
- Five Ways to Spot a Scam (ongoing)
- Taxpayer Bill of Rights (ongoing)
- ACA Pub 5187 (ongoing)
- Free File (ongoing)

## **Visual Education and Communications**

Live/Taped Broadcasts:

- Labor & Relations/NTEU Training for Executives - Stream/Polycom/Centra (NCFB Auditorium) (05/12-05/14)
- Chief Counsel Ethics Streaming Rebroadcast (05/14)
- Labor & Relations/NTEU Training for Executives - Stream/Polycom/Centra (1111 Main Building) (05/14)

Streaming Assisted Events:

- N/A

YouTube Postings

- English:
  - N/A
- Spanish:
  - N/A
- ASL:
  - N/A

Centra Captions:

- PDB: How the IRS Use's Twitter (05/12)
- ITG: Annual Fraud Update Session (05/13)
- Learn & Lead 24x7 – Presenting a Library of eBooks and Videos on Your Laptop (05/14)
- Pre-Open Enrollment Session (05/14)

Other Projects:

- New Employee Orientation Avid Edit (05/11-05/12)
- English YouTube Avid Edit (05/11-05/12)
- Points of Risk Avid Edit (05/11-05/15)
- ASL Tax Tips TT-50 Rehearsal (05/12)
- English YouTube - How to Request a Copy of Your Tax Return Final Cut Pro Edit (05/12-05/13)
- English YouTube - Products for Taxpayers Who are Visually Impaired - Final Cut Pro Edit (05/12-05/13)
- ASL Tax Tips TT-50 Taping (05/13)
- ASL Tax Tips TT-50 Voiceover (05/14)

- ASL Tax Tips TT-50 - Avid Edit (05/14-05/15)

Service-Wide Video Editorial Board (SVEB):

SVEB have 10 Video Request pending Deputy Commissioner approval. They are:

- YT Request #64 – Understanding the Audit information provided on the Form 4549
- YT Request #65 – Audits by Mail: What Should you do?
- YT Request #66– Understanding Your EITC Correspondence Examination
- YT Request #67– IRS Auction PLAYLIST on the IRS YouTube Channel
- Request #93 – W&I Welcome to Free File April 2015 Videos.
- Request #176 – SBSE Circular 230 Webinar
- Request #323 – IRS Nationwide Tax Forums Online (NTFO) 2015 Videos
- AMENDED Request #321 – SBSE Affordable Care Act (ACA) Video Training for ROs (Part of RO CPE)
- Request #324 – IRS 2015 FMSS Physical Security Mandatory Briefing: “RUN, HIDE, FIGHT” Video
- Request #325 – SBSE Tangible Property Regulations Webinar

# **Communications and Liaison – Weekly Activity Report**

## **Week of June 1, 2015**

### **Internal Communications**

#### IRS Headlines

- Find out how you can help IRS better manage risk (CRO)

#### Leaders' Alert

- Use HR Connect to assign your employees to the correct building location (AWSS)
- Register now for your 2016 National Agreement Phase 2 training (HCO)
- Don't input retirement or death personnel action requests in HR Connect (HCO)
- Taking leave can affect your employees' eligibility for night pay differential (AWSS)

#### Other News

- IRS Cares: Employee is called to the other certainty in life (W&I)

#### Poll Questions

- What are the functions of a Copier/Multi-functional Device? (IT)

#### Spotlight

- LGBT Pride Month: Completing the Dream (EDI)

#### Webbie

- Explore the world of invisible disabilities on 6/10 (EDI)

Learn how to earn college credits through IRS College Credit Program (HCO)

### **National Media Relations**

#### News releases for week of June 1st:

- Prepare for Hurricanes, natural disasters by safeguarding tax records
- New Videos and Web Tools Available for Individual Taxpayers Living Abroad (May 21)

#### News release possible for coming weeks:

- Reminder of June 15 deadline for individual taxpayers living abroad  
The IRS website is available in multiple languages

### **National Public Liaison**

Thursday, June 11, 1:00pm – Commissioner Koskinen will be meeting with State Revenue officials and CEOs of Tax Software Companies, Banks, and Payroll Providers to discuss and approve recommendations from a coalition of representatives from



Industry, states and IRS to prevent Identity Theft, and educate taxpayers on how to protect their personally identifiable information. It will take place at 1111 Constitution Ave., in room 3313.

## **Legislative Affairs**

Upcoming Meetings:

Currently, there are no meetings scheduled.

Upcoming Hearings:

On Tuesday, June 2, 2015, Commissioner John Koskinen and Treasury Inspector General for Tax Administration J. Russell George will testify before the Senate Committee on Finance at a hearing entitled, "Internal Revenue Service Data Theft Affecting Taxpayer Information." The hearing will take place at 10:00 a.m. in room 215 Dirksen Senate Office Building.

On Tuesday, June 2, 2015, Commissioner John Koskinen and Terry Milholland, Chief Technology Officer will testify before the Senate Committee on Homeland Security and Governmental Affairs at a hearing entitled, "The IRS Data Breach: Steps to Protect Americans' Personal Information." The hearing will take place at 2:00 p.m. in room 342 Dirksen Senate Office Building.

On Wednesday, June 3, 2015, the House Committee on Oversight and Government Reform will hold a hearing entitled, "Ensuring Agency Compliance with the Freedom of Information Act (FOIA) Part II." The hearing will take place at 9:00 a.m. in room 2154 Rayburn House Office Building.

## **Social Media**

Tumblr posts scheduled for this week:

Monday, June 1

- ACA: HCTT #32, "Find out how ACA affects Employers with 50 or more Employees"
- National Tax Forums

Tuesday, June 2

- 5 Ways to Spot a Scam
- IRS2Go 5.0 (video)

Wednesday, June 3

- Small Business Video Portal
- IRS e-books

Thursday, June 4

- Preparing for Disasters
- ACA

Friday, June 5

- Your Guide to an IRS Tax Audit
- Visit IRS en Espanol Tumbler Page

YouTube videos embedded on IRS.gov this week:

- Preparing for Disasters

Facebook tabs for this week

- Taxpayer Bill of Rights
- 5 Ways to Spot a Scam
- ACA Publication 5208, "Are you an applicable large employer?"

## **Visual Education and Communications**

Live/Taped Broadcasts:

- N/A

Streaming Assisted Events:

- N/A

YouTube Postings

- English:
  - N/A
- Spanish:
  - N/A
- ASL:
  - Products for Taxpayers Who Are Visually Impaired

Centra Captions:

- FSLG FY15 CPE: Common Case Errors and Work Paper Considerations (06/04)

Other Projects:

- EITC - Avid Edit (06/01-06/05)
- Spanish YouTube Final Cut Pro Editing (06/01-06/04)

Service-Wide Video Editorial Board (SVEB):

Two video requests have been approved the SVEB and are pending Deputy Commissioner approval. They are:

- REBROADCAST Request #327 – SBSE Payments to Independent Contractors Webinar
- AMENDED Request #319 – ACA: TE/GE Stakeholders Video Webcast on ACA ESRP and Info Reporting Audio Webinar
-

## **Communications and Liaison – Weekly Activity Report**

### **Week of June 8, 2015**

#### **Internal Communications**

All-employee email

- Commissioner Koskinen and NTEU President Colleen Kelley remind you to take the Federal Employee Viewpoint Survey (Comm)

IRS Headlines

- Viewpoint Survey deadline is June 15 for most employees, June 29 for seasonals (HCO)

Leaders' Alert

- Closing of Digital Copy Center may mean costs for copying services (W&I)
- Participate in June 24 webinar on how to best use Learn and Lead 24x7 (HCO)

Poll Questions

- Which is true of Reduced SmartID Sign-On/SmartID? (IT)
- Where can you find information about the IRS tax calendar for businesses and self-employed taxpayers? (SBSE)

Spotlight

- What's on your plate? (Health guidelines) (C&L)
- Effective Communication Month (C&L)

Daily News

- Know your social media restrictions when you volunteer (Counsel)
- Get free support to quit smoking, manage stress, lose weight, more (HCO)

#### **National Media Relations**

News releases for week of June 8th:

- Security Summit Thursday, June 11th
- FBAR reminder with mention of FATCA & the June 15 deadline for individual taxpayers living abroad
- The IRS website is available in multiple languages

News release possible for coming weeks:

- Empowerment Zone extension
- Fact Sheet on SBSE Circular 230 webinar
- Watching – TX disaster declarations

#### **National Public Liaison**

Tuesday June 9, Wednesday June 10 – The Information Reporting Program Advisory Committee (IRPAC) is convening for a working session. IRS Headquarters Building.

## **Legislative Affairs**

Upcoming Meetings:

Currently, there are no meetings scheduled.

Upcoming Hearings:

Currently, there are no hearings scheduled.

## **Social Media**

### **Visual Education and Communications**

Live/Taped Broadcasts:

- AD Townhall Meeting Stream/Polycom (06/11)

Streaming Assisted Events:

- N/A

YouTube Postings

- English:
  - Products for Taxpayers Who Are Visually Impaired
- Spanish:
  - Products for taxpayers who are visually impaired
  - Free help preparing your tax return
  - Do it yourself free tax preparation
- ASL:
  - N/A

Centra Captions:

- Inside the Invisible World of Disabilities (06/10)
- Pre Open Enrollment Session (06/11)

Other Projects:

- EITC - Avid Edit (06/08-06/12)
- Spanish YouTube Final Cut Pro Editing (06/08-06/11)

Service-Wide Video Editorial Board (SVEB):

One video request is pending Deputy Commissioner approval. It is:

- Request #329 – TEGE Easy low-cost ways to start your small business retirement plan Webinar using Audio Webcast

# **Communications and Liaison – Weekly Activity Report**

## **Week of June 15, 2015**

### **Internal Communications**

#### IRS Headlines

- Retirement process begins with requesting application package (HCO)
- Six ways you can protect IRS network — and stay out of trouble (Multiple)
- Reservists and National Guard may qualify for supplemental payment (AWSS)
- Use correct time code for weather-related building closures (AWSS)

#### Leaders' Alert

- Use Schedule A hiring authority to fill jobs quickly, non-competitively (HCO)
- Virtual continuing professional education training for administrative professionals begins July 7 (HCO)
- Remind your employees that following policies protects network, sensitive information (Multiple)
- Route your HR Connect documents properly (AWSS)

#### Poll Questions

- During Small Business Week, May 4-8, how many people visited SB/SE's IRS.gov pages for helpful information about running their businesses? (SB/SE)
- Of the following, who was not caught with the assistance of the then Intelligence Unit of the Bureau of Internal Revenue (now known as the Criminal Investigation Division)? (RAS)

#### Spotlight

- An even exchange (hosting exchange students) (C&L)

#### Webbies

- June is Men's health month (HCO)
- Chat Live is back to help with your travel questions (AWSS)
- Learn how to accommodate employees with Post Traumatic Stress Disorder (EDI)
- One employee's efforts benefits thousands of seasonal employees (HCO)
- Protect taxpayers — keep your desk free of sensitive and private information (AWSS)
- Stay vigilant about your personal safety (AWSS)
- Cross-functional team races against clock to recover fraudulent refund (DCSE)

### **National Media Relations**

#### News releases for week of June 15th:

- RPO Release, Tuesday, June 16<sup>th</sup>
- Fact Sheet on SBSE Circular 230 webinar, Wednesday, June 17<sup>th</sup>
- The IRS website is available in multiple languages Thursday, June 18<sup>th</sup>
- Empowerment Zone extension

#### News release for coming weeks:

- FATCA Filing Deadline Reminder

## **National Public Liaison**

### **Legislative Affairs**

Upcoming Meetings:

Currently, there are no meetings scheduled.

Upcoming Hearings:

Currently, there are no hearings scheduled.

### **Social Media**

YouTube videos embedded on IRS.gov this week:

- ID Theft

Twitter

- Nationwide Tax Forums
- Numerous YouTube Video tweets
- SCAMS
- Online Payment Agreements
- June 30 FATCA deadline
- ACA (minimum 1 tweet daily)

Tumblr posts scheduled for this week:

Monday, June 1

- FBAR Webinar
- ACA information for employers

Tuesday, June 2

- Health Care TaxTip #35
- Preparing for Disasters

Wednesday, June 3

- ACA information for employers
- IRS Products for Hearing Impaired Taxpayers

Thursday, June 4

- Nationwide Tax Forums
- ACA – Applicable Large Employers

Friday, June 5

- ACA Pub 5152
- Tax Scams (video)

Facebook tabs for this week

- 5 ways to spot a Scam

ACA Pub 5200

## **Visual Education and Communications**

Live/Taped Broadcasts:

- N/A

Streaming Assisted Events:

- N/A

YouTube Postings

- English:
  - International Taxpayers Filing Status If Married to a Nonresident Alien
  - Products for Taxpayers Who Are Visually Impaired
- Spanish:
  - 2015 IRS Nationwide Tax Forums
  - Products for Taxpayers Who Are Visually Impaired
- ASL:
  - N/A

Centra Captions:

- YouTube Script Writing and Approval Process (06/16)
- HCO Town Hall Meeting (06/16)
- Module 1: Overview of Knowledge Management and K-Nets (06/18)
- Module 2: Disclosure (06/19)

Other Projects:

- Spanish YouTube: Free Help Preparing Your Tax Return – Final Cut Pro Edit (06/15-06/18)
- Spanish YouTube: Do-It-Yourself Free Tax Preparation - Final Cut Pro Edit (06/15-06/18)
- SBSE TFRP Podcast Audio Recording (06/17)

Service-Wide Video Editorial Board (SVEB):

N/A

# **Communications and Liaison – Weekly Activity Report**

## **Week of June 22, 2015**

### **Internal Communications**

#### IRS Headlines

- Administrative Professionals Virtual Continuing Professional Education training begins July 7 (HCO)

#### Leaders' Alert

- You should approve advanced leave for birth, adoption and foster care (HCO)
- New requirements for requesting national security clearances (HCO)
- Promptly approve Public Transportation Subsidy Program forms (AWSS)
- Mark the profile indicator in SETR for employees who telework (AWSS)
- Dispose of employee performance files correctly (AWSS)

#### Spotlight

- A passion for pensions (TE/GE)

#### Webbies

- First Swiss bank agrees to help combat offshore tax evasion (DCSE)

Are important emails landing in your junk mail folder? (IT)

### **National Media Relations**

News releases for week of June 22nd:

- The IRS website is available in multiple languages Tuesday, June 23<sup>rd</sup>

News release for coming weeks:

- Pilot penalty relief on small retirement plans made permanent (TBD)
- FATCA Filing Deadline Reminder (TBD)

### **National Public Liaison**

### **Legislative Affairs**

NOT IRS AGENCY RECORDS



Upcoming Hearings:

Currently, there are no hearings scheduled.



## **Social Media**

YouTube video embedded on IRS.gov this week:

- Tax Forums

Twitter

- Nationwide Tax Forums
- Daily YouTube video tweets
- June 30 FATCA deadline
- Daily ACA tweets
- Child and Dependent Care Tax Credit
- ABLE Act

Tumblr posts scheduled for this week:

Monday, June 1

- Appeals Process
- Owe taxes but can't pay?

Tuesday, June 2

- Tax Forums (video)
- Charity Select Check tool

Wednesday, June 3

- Appeals Process
- International Taxpayers: Foreign Tax Credit (video)

Thursday, June 4

- Small Business Tax Center
- Washington DC Tax Forum

Friday, June 5

- Flood Disaster Preparedness
- Home Energy Credit

Facebook tabs for this week

- ACA Pub 5200

## **Visual Education and Communications**

Live/Taped Broadcasts:

- N/A

Streaming Assisted Events:

- N/A

YouTube Postings

- English:
  - International Taxpayers-Foreign Tax Credit
- Spanish:
  - N/A
- ASL:
  - N/A

Centra Captions:

- Module 3: K-Net Processes (06/22)
- Inside the Invisible World of Disabilities (06/23)
- How IRS Uses Twitter (06/23)
- Whistleblower Subject Matter Expert Training (06/24)
- Accommodating Employees with PTSD (06/24)
- HCO Focus Days (06/25)
- Module 4: K-Net Technology (06/25)

Other Projects:

- SBSE Commissioner Taping @1111 (06/22)
- Rehearsal - SBSE Tangible Property Regulations Webinar (06/23)
- SBSE Tangible Property Regulations Webinar – Taping (06/24)

Service-Wide Video Editorial Board (SVEB):

Eleven video requests have been approved the SVEB and are pending Deputy Commissioner approval. They are:

- YouTube Request#68 – FATCA video series: 11 Updates and 6-8 new videos
- Request #330 – TEGE Correcting Retirement Plan Mistakes – Summer 2015 Updates Webinar, using Audio Webcast
- Request #331 – SBSE Simplified Home Office Deduction Video
- Request #328 – SBSE/TEGE Retirement Plans Video – SBSE Megataping Day
- Request #332 – SBSE Notices Top Questions and their Answers Video – SBSE Megataping Day
- Request #333 – SBSE Offer in Compromise Pre-Qualifier Tool Video – SBSE Megataping Day
- Request #334 – SBSE Complying with the Bank Secrecy Act Video – SBSE Megataping Day
- Request #335 – SBSE - Schedule C: Who needs to file it and how to do it Video – SBSE Megataping Day
- Request #336 – SBSE – Seasonal Business Video – SBSE Megataping Day
- Request #337 – SBSE – Employing Family Members Video – SBSE Megataping Day
- Request #338 – SBSE – Online Payment Agreement - An introduction to the self-help tool Video – SBSE Megataping Day

# **Communications and Liaison – Weekly Activity Report**

## **Week of June 29, 2015**

### **Internal Communications**

#### IRS Headlines

- End of year Publishing requests due by July 17 (W&I)
- You may use advanced leave for childbirth, adoption and foster care (HCO)
- Donate to Feds Feed Families through Aug. 28 (AWSS)
- Bargaining unit employees have right to NTEU representation (HCO)
- OPM breach didn't affect Thrift Savings Plan accounts (HCO)

#### Leaders' Alert

- Keep track of appraisal deadlines with ePerformance progress reports (AWSS)
- Complete OS GetServices, HR Connect actions when employees vacate workspace due to separation (AWSS)
- Treasury Executive Institute offers leadership courses, networking opportunities (HCO)
- Deputy commissioners issue strategy to optimize workspace (AWSS)

#### Daily News (webbies)

- IRS implements phase one of the Full Service Intelligent Mail Barcode (DCSE)

#### Poll questions

- When should you call the Enterprise Service Desk? (IT)
- Records of tax enforcement results, or ROTERs, can't be used for... (SBSE)

#### Spotlight

- A passion for pensions (TEGE)

### **National Media Relations**

#### News releases for week of June 29th:

- The IRS.gov help available in multiple languages - Tuesday, June 30<sup>th</sup>
- Small Businesses can get IRS Penalty Relief for Unfiled Retirement Plan Returns – Wednesday, July 1

#### News release for coming weeks:

- FATCA Filing Deadline Reminder (TBD)

### **National Public Liaison**

### **Legislative Affairs**

NOT IRS AGENCY RECORDS



### Upcoming Hearings:

Currently, there are no hearings scheduled.

### **Social Media**

YouTube video embedded on IRS.gov this week:

- Tax Forums

#### Twitter

- Nationwide Tax Forums
- Daily YouTube video tweets
- June 30 FATCA deadline
- IRS begins Summertime Tax Tip series
- Daily ACA tweets (feature HCCT #36 & #37)

Tumblr posts scheduled for this week:

Monday, June 29

- ACA Health Care Tax Tip #36

Tuesday, June 30

- ACA Health Care Tax Tip #37

Wednesday, July 1

- Tangible Property Regulations Webinar
- Summertime Tax Tip #1

Thursday, July 2

- Premium Tax Credit (video)
- Summer Jobs Tax Tip

Facebook tabs for this week

ACA Pub 5200

### **Visual Education and Communications**

Live/Taped Broadcasts:

- N/A

Streaming Assisted Events:

- N/A

YouTube Postings

- English:
  - N/A
- Spanish:

- Do-It-Yourself Free Tax Preparation
- ASL:
  - N/A

Centra Captions:

- K-Net Collaboration and Communication (06/30)
- RAC Call - Case Closing (07/01)
- FSLG FY15 CPE - Counsel Panel Discussion - Hot Topics & Worker Classification (07/02)

Other Projects:

- N/A

Service-Wide Video Editorial Board (SVEB):

Two video requests have been approved the SVEB and are pending Deputy Commissioner approval. They are:

- Request #339 – EOPS Town Hall Meetings via Webcast
- Request #340 – W&I SPECIP Train-the-Trainer Video: Live Presentation to be taped by United Way of Escambia in Pensacola, Florida

# **Communications and Liaison – Weekly Activity Report**

## **Week of July 6, 2015**

### **Internal Communications**

#### IRS Headlines

- Apply by July 17 to be considered for the Voluntary Relocation Program (HCO)
- 2015 UNAX Awareness briefing available July 13 (PGLD)
- Updated guidance sent outside the IRS network (PGLD)
- ABLE accounts for people with disabilities (SB/SE)
- Easily track your payroll personnel or leave OS GetServices tickets (AWSS)
- You can unlock your own SETR account (AWSS)

#### Leaders' Alert

- Help your departing employees properly secure, transfer their records (PGLD)
- Separating Employee Clearance conference calls scheduled for July, August and September (AWSS)
- Mandatory briefings available beginning July (HCO)
- Use the new request form for customized human resources reports (AWSS)
- You're the first point of contact for employees (AWSS)

#### Other News

- Spirit of IRS: Navigating tricky waters (Outer Continental Shelf team) (LB&I)

#### Spotlight

- Cool to be kind (Cheer up the Lonely Day) (Multiple)

#### Daily News

- Whistleblower Office helps ensure compliance (DCOS)
- Learn more about millennials, America's largest generation (EDI)

### **National Media Relations**

#### News releases/Fact Sheet for week of July 6th:

- Small Businesses can get IRS Penalty Relief for Unfiled Retirement Plan Returns
- Summertime Tax Tips Sign-up Release (aiming for July 6<sup>th</sup> or 7<sup>th</sup>)
- Tangible Property Fact Sheet for SBSE (aiming for Friday, 7/10)
- Alternate Investment Vehicles press release and notices on listed transactions and transaction of interest.

#### News releases/Fact Sheets for coming weeks:

- FATCA Filing Deadline Reminder (TBD)
- Preparedness Series: Choosing a Tax Preparer
- Updated Phone Scams release with possible tie in to the CP2000 issue

### **National Public Liaison**

## Professional Stakeholder Relationship Management Branch

Thursday July 16, 9 am – Noon – NPL Liaison Meeting with national association partners in Room 2140. Preliminary agenda includes preview of 2016 filing season, an update from the ACA Office, and other topics.

## Liaison and Tax Forums Branch

Participant registration for the Tax Forums has reached 6239. National Harbor leads with 1874 paid registrants followed by San Diego, Denver, Orlando and Atlanta with 1392, 1153, 1067 and 986 respectively.

## **Legislative Affairs**

### Upcoming Meetings:

Currently, there are no meetings scheduled.

### Upcoming Hearings:

On Thursday, July 23, 2015, a hearing is scheduled to be held before the Subcommittee on Oversight, House Ways and Means Committee on GAO's review of TEGE's case referral criteria. The hearing is scheduled for 10:00 am, in room 1100 of the Longworth House Office Building.

Witness: Commissioner, John Koskinen is scheduled to testify.

## **Social Media**

YouTube video embedded on IRS.gov this week:

- Tax Forums

### Twitter

- Nationwide Tax Forums
- Daily YouTube video tweets
- June 30 FATCA deadline
- IRS begins Summertime Tax Tip series
- Daily ACA tweets (feature HCCT #36 & #37)

Tumblr posts scheduled for this week:

Monday, June 29

- ACA Health Care Tax Tip #36

Tuesday, June 30

- ACA Health Care Tax Tip #37

Wednesday, July 1

- Tangible Property Regulations Webinar
- Summertime Tax Tip #1

Thursday, July 2

- Premium Tax Credit (video)

- Summer Jobs Tax Tip

Facebook tabs for this week

ACA Pub 5200

## **Visual Education and Communications**

Live/Taped Broadcasts:

- N/A

Streaming Assisted Events:

- N/A

YouTube Postings

- English:
  - N/A
- Spanish:
  - Free Help Preparing Your Tax Return
- ASL:
  - N/A

Centra Captions:

- PDB Plain Language and Style Editing Refresher Training (07/07)
- ESETS Town Hall Meeting (07/08)
- Millennials 2015 (07/09)
- FY 15 IG Awareness II (07/10)
- All GLC Summit - FY15 Q3 (07/10)

Other Projects:

- N/A

Service-Wide Video Editorial Board (SVEB):

N/A



# **Communications and Liaison – Weekly Activity Report**

## **Week of July 13, 2015**

### **Internal Communications**

#### IRS Headlines

- Join Leave Bank during second open season through Aug. 12 (HCO)
- Mandatory briefings now available (HCO)
- Verify your Order Point Number beginning July 13 (W&I)
- Some employees received more money in their 7/9 paycheck (AWSS)
- Learn the annual leave rules for your appointment (AWSS)

#### Leaders' Alert

- Help your departing employees properly secure, transfer their records (PGLD)
- July 22 webinar presents best practices to engage lesbian, gay, bisexual and transgender community (HCO)
- Follow steps to request forgiveness of advanced leave for separating employees (AWSS)
- Submit personnel actions for employees using leave for military service (AWSS)

#### Daily News (webbies)

- July is Ultraviolet Safety Month (HCO)
- HR Connect unavailable 7/17–7/20 (AWSS)
- Before traveling between 8/24 and 9/30, review travel guidance (AWSS)
- Automated security reporting system down for maintenance, 7/10-7/22 (AWSS)
- IT Security Tip: Identity-protection phishing campaigns (IT)

#### Poll questions

- According to the IRS Style Guide, which is written properly when standing alone in a sentence? (C&L)
- How many IRS acronyms does the Servicewide Policy, Directives, and Electronic Research Acronyms Database contain? (RAS)

#### Spotlight

- To boldly go where no geek has gone before... (Embrace your geekness) (W&I)

Pitching yourself (Interviewing skills and tips) (Multiple)

### **National Media Relations**

News releases/Fact Sheet for week of July 13th:

- Tangible Property Fact Sheet for SBSE - 7/13

- Small Businesses can get IRS Penalty Relief for Unfiled Retirement Plan Returns – 7/14
- Preparedness Series: Choosing a Tax Preparer week of 7/16 (Yadira)

News releases/Fact Sheets for coming weeks:

- FATCA Filing Deadline Reminder (TBD)
- Updated Phone Scams release with possible tie in to the CP2000 issue

## **National Public Liaison**

Professional Stakeholder Relationship Management Branch

Thursday July 16, 9 am -- NPL Liaison Meeting with IRS association partners. Preliminary agenda includes updates on Filing Season 2016, Office of Professional Responsibility and the ACA Office. Room 2140.

Tax Forums and Liaison Branch

Participant registration for the 2015 IRS Nationwide Tax Forums has reached 6717. National Harbor concluded last week with just under 2000 paid registrants. The next location on the schedule is Denver Colorado and currently has 1217 individuals registered with approximately two weeks left to register. Commissioner John Koskinen will deliver the Keynote Address on the opening day at the Denver Tax Forum on July 28th. The Tax Forum in Denver runs through July 30<sup>th</sup>. The remaining cities on the schedule include San Diego, Atlanta and Orlando with 1443, 1032 and 1107 respectively.

The Internal Revenue Service Advisory Committee will have its working session meetings on July 21<sup>st</sup> and 22<sup>nd</sup>, 2015. Potential topics include discussion on the IRS Security Summit and the Return Preparer Office.

## **Legislative Affairs**

NOT IRS AGENCY RECORDS



## **Upcoming Hearings:**

On Thursday, July 23, 2015, a hearing is scheduled to be held before the Subcommittee on Oversight, House Ways and Means Committee on GAO's review of TEGE's case referral criteria. The hearing is scheduled for 10:00 am, in room 1100 of the Longworth House Office Building.

Witness: Commissioner, John Koskinen is scheduled to testify.

## **Social Media**

YouTube video embedded on IRS.gov this week:

- IRS Tax Forums
- Phone Scams (possible)
- IRS2Go (possible)

#### Twitter

- Summertime Tax Tip series (STTT #5, IRS Notices)
- Summertime Tax Tip series (STTT #6, Tips for the Military )
- Summertime Tax Tip series (STTT #7, Tax Help en Espanol)
- Daily ACA tweets (including HCTT #39, Online Tool Helps Individuals and Employers Estimate Health Care Law Credits and Payments )
- TAS FY2016 Objectives Report to Congress ( @IRSnews and @IRStaxpros re-tweets the TAX Twitter posts)
- Nationwide Tax Forums
- Daily YouTube video tweets

#### Tumblr posts scheduled for this week:

##### Monday, July 13

- HCTT #39
- STTT #5: IRS Notices

##### Tuesday, July 14

- Creditos y Deducciones
- Online Tax Calendar (video)

##### Wednesday, July 15

- STTT #6: Military Tips
- Tangible Properties Webinar
- TAS FY2016 Objectives Report to Congress

##### Thursday, July 16

- Denver Tax Forum
- Don't Be Fooled! Tax Scam

##### Friday, July 17

- STTT #7: Tax Help en Español

IRS2Go 5.0

### **Visual Education and Communications**

#### Live/Taped Broadcasts:

- N/A

#### Streaming Assisted Events:

- N/A

#### YouTube Postings

- English:
  - N/A
- Spanish:
  - N/A
- ASL:
  - N/A

Centra Captions:

- N/A

Other Projects:

- New Employee Orientation - Avid Edit (07/13-07/17)
- Point Of Risk Contractor Version - Avid Edit (07/13-07/17)
- Commissioner Taping @11111 - (APA) Latino Tax Professionals (07/17)
- Editing & Graphics: W&I CPE 2016

Service-Wide Video Editorial Board (SVEB):

Five video requests are up for review this week and are pending SVEB and Deputy Commissioner approval. They are:

- Request #341 –TEGE Tribal Council Pay Webinar, Using Audio Webcast
- Request #342 –TEGE Reporting Requirements for Travel Expenses Webinar, Using Audio Webcast
- Request #343 –TEGE Tip Agreements Webinar, Using Audio Webcast
- Request #344 –TEGE Voluntary Closing Agreement Program Updates for Tax Exempt Bonds Webinar, Using Audio Webcast
- Request #346 –TEGE Employee Plans Compliance Unit (EPCU) Updates Webinar, Using Audio Webcast

## **Communications and Liaison – Weekly Activity Report Week of July 27, 2015**

### **Internal Communications**

#### IRS Headlines

- Explore career development resources, free Harvard courses in latest training newsletter (HCO)
- Monitor your leave balances, including use or lose (AWSS)

#### Leaders' Alert

- Use Form 14703 for Post of Duty change requests (HCO)
- [Refer taxpayer discrimination complaints to EDI's Civil Rights Division](#) (EDI)
- Senior managers: Become a better leader through the Continuous Leadership Journey (HCO)
- Attend Aug. 5 webinar to help employees improve performance (HCO)

#### Daily News (webbies)

- Contracting officer's representatives: Submit proper form when a contractor leaves (AWSS)
- Safeguard your SmartID and PIN at all times (AWSS)

#### Poll questions

- Which is a feature of the Canon Copier Multifunctional Devices? (IT)

#### Spotlight

- Manage your moolah (Multiple)

#### Other News

IRS Cares: The circle of life (saving) (SB/SE)

### **National Media Relations**

News releases/Fact Sheet for week of July 27th:

- Preparedness Series: Choosing a Tax Preparer(Yadira)

News releases/Fact Sheets for coming weeks:

- Get Transcript (Tentative)
- Updated Phone Scams release with possible tie in to the CP2000 issue

### **National Public Liaison**

Stakeholder Relationship Management Branch

Wednesday Aug. 5th – Commissioner Koskinen greets attendees at Latino Tax Professionals National Convention via recorded video message.

Liaison and Tax Forums Branch

Participant registration for the 2015 IRS Nationwide Tax Forums is now just over 8200. The final reported attendance for National Harbor was 1915 paid registrants. There are

currently 1386 individuals registered for the Denver Colorado Tax Forum which begins July 28<sup>th</sup> and runs through July 30<sup>th</sup>. The remaining cities on the schedule include San Diego, Atlanta and Orlando with 1763, 1278 and 1320 respectively.

## **Legislative Affairs**

NOT IRS AGENCY RECORDS



### Upcoming Hearings:

On Wednesday, July 29, 2015, a hearing is scheduled to be held before the Senate Committee on the Judiciary's Subcommittee on Oversight, Agency Actions, Federal Rights and Federal Courts on "Revisiting IRS targeting: Progress of Agency Reforms and Congressional Options". The hearing is scheduled for 2:00 pm in room 106 of the Dirksen Senate Office Building.

Witness: Commissioner, Koskinen is scheduled to testify.

On Wednesday, August 5, 2015, Senate Judiciary Committee will hold a hearing on Inspector General access issues generally, and the use of grand jury secrecy rules as a reason to deny IG access specifically. The hearing will focus on the IG access issues related to grand jury material in TIGTA report 2014-30-081, September 19, 2014. The hearing time and room are TBD.

Witness: Commissioner, Koskinen is scheduled to testify.

Other Witnesses: Department of Justice and the DOJ Inspector General Department of Justice, Federal Bureau of Investigation, the Deputy Attorney General's office and TIGTA have also been invited.

## **Social Media**

YouTube video embedded on IRS.gov this week:

- ID Theft, First step for victims
- Telephone Scams (possible)
- ACA/HealthCare video (possible)
- IRS Tax Forums (possible)

IRS.gov front page - Rotating Spotlight

- Security Summit
- Summer Tax Tips
- Get the Facts - transcript incident
- Identity Theft
- Health Care and Taxes

IRS.gov front page – News

- Follow IRS on Tumblr
- Penalty Relief for Certain Small Businesses
- Proposed Tax Guidelines for ABLE Accounts

- 2015 IRS Nationwide Tax Forums

#### Twitter

- Summer Tax Tip #11 - No Need to Wait Until Oct. 15 Extension Deadline to File
- Summer Tax Tip #12 - Tips on Travel While Giving Your Services to Charity
- Summer Tax Tip #13 - Ten Key Tax Facts about Home Sales
- Health Care Tax Tip #42 - Self-Insured Employers Must File Health Coverage Information Returns
- Health Care Tax Tip #43 - It's Time for a Mid-Year Premium Tax Credit Checkup
- #IRS webinars on #HealthCare Law <http://go.usa.gov/3fJVC>
- IRS "What's Trending" #ACA webpage <http://go.usa.gov/3jwTB>
- IRS trucking #tax center, E-file form 2290 <http://go.usa.gov/TPyW>
- Nationwide Tax Forums
- Daily YouTube video tweets
- Daily ACA tweets

#### Tumblr posts scheduled for this week:

- Summer Tax Tip #11: Don't Wait Until Oct. 15
- Summer Tax Tip #12: Charitable Travel
- Summer Tax Tip #13: Sale of Home
- Health Care Tax Tip #41
- Health Care Tax Tip #42
- SSA/IRS Reporter
- Independent Contractor (En Espanol)
- Life Change = Change in Circumstances (En Espanol)
- SSA/IRS Reporter (En Espanol)
- Denver Tax Forum

### **Visual Education and Communications**

#### Live/Taped Broadcasts:

- N/A

#### Streaming Assisted Events:

- N/A

#### YouTube Postings

- English:
  - N/A
- Spanish:
  - N/A
- ASL:
  - N/A

#### Centra Captions:

- Fundamentals of UBIT Law and Application (07/27)
- Recognizing and Examining 502(c)(7) Social Clubs (07/28)
- Engagement - Why It's More Important than Ever (07/28)
- L&E Soft Skill Class - Critical Thinking (07/29)
- IRS U Webinar: Online Etiquette (07/29)
- Private Foundations Overview (07/29)
- Charitable Hospitals and the Affordable Care Act (07/29)

- Accommodating Employees With MS (07/29)
- Foreign Conduits and FBAR Awareness (07/30)
- L&E Soft Skills Class - Customer Satisfaction (07/30)

Other Projects:

- POR- Contractor Version Avid Edit (07/27-07/28)
- SBSE Mega Taping (07/27-07/31)
- SBSE AJAC Taping (07/28)
- HCO ACA Video Avid Edit (07/29-07/31)
- SBSE AJAC Avid Edit (07/29-07/31)

Service-Wide Video Editorial Board (SVEB):

Seven video requests are up for review this week and are pending Deputy Commissioner approval. They are:

- Request #351 – TEGE An Introduction to Tax-exempt Bonds for First Time Issuers
- Request #352 – TEGE Information for First Time Issuers of Tax Exempt Bonds – Introduction to Private Business Use
- Request #353 – TEGE Information for First Time Issuers of Tax Exempt Bonds – Introduction to Arbitrage
- Request #354 – TEGE FSLG TIN Matching to the Rescue
- Request #355 – TAS ACA Training Videos for Low Income Taxpayer Clinics (LITC)
- Request #356 – TAS Developing Persuasive Writing Skills for Conducting Internal Management Document Reviews-TBOR in IRMs

Request #357 – TAS Affordable Care Act – Update



# **Communications and Liaison – Weekly Activity Report**

## **Week of August 3, 2015**

### **Internal Communications**

#### IRS Headlines

- Laptop refreshment program to resume this fall (IT)

#### Leaders' Alert

- Make sure you know protocols for infectious disease (HCO)
- Review updated procedures for securing sign language interpreting, translation services (EDI)
- Encourage your employees to volunteer for the 2015 Combined Federal Campaign (AWSS)
- Attend Aug. 12 and 19 CENTRA sessions to learn how to better develop your employees (HCO)
- Conduct annual ethics and outside employment discussions with your bargaining unit employees (HCO)
- Review your printed products to help reduce costs (W&I)
- Know your responsibilities as a manager for seasonal employees entering non-pay status (AWSS)

#### Poll Questions

- Which of the following does the Employee Assistance Program provide? (HCO)

#### Spotlight

- Birds of a feather travel together (IRS adventures) (Multiple)
- An itch to hitch (C&L)

#### Daily News

Keep an eye on your pay, deductions and leave (AWSS)

### **National Media Relations**

News releases for week of August 3rd:

- Phone Scams Update
- ACT Member Solicitation

News release possible for coming weeks:

- Tax Preparedness
- Back to School Tips

### **National Public Liaison**

#### Professional Relationship Management Branch

Wednesday Aug. 5th – Commissioner Koskinen greets attendees at Latino Tax Professionals National Convention via recorded video message.

## Liaison and Tax Forums Branch

Liaison and Tax Forums Branch concluded its second in a series of five Tax Forums this week in Denver, Colorado. Commissioner John Koskinen delivered the keynote address to an audience of approximately 1400 tax professionals. Some attendees thanked the Commissioner for his appearance and one commented that “of the 12 years that I’ve been coming to the Tax Forum, your speech was the best”. A few others raised questions or offered suggestions regarding W-2 processing and identity theft to which he agreed to bring back to Washington DC for consideration. During the speech, the Commissioner acknowledged that refund criminals and overseas syndicates are getting smarter and that the IRS has a high priority of making systems and taxpayer data secure, advising of substantive changes coming this summer; comments of which were captured and shared real time by an avid tweeter.

While in Denver, the Commissioner also met with the Council for Electronic Revenue Communication Advancement (CERCA) and the Denver University Law School Practitioner Institute.

The remaining cities on the schedule include San Diego on August 11th- 13, Atlanta on August 25<sup>th</sup> -27<sup>th</sup> and, Orlando starting on September 1<sup>st</sup> -3<sup>rd</sup>. Attendance thus far for the remaining events, are 2024, 1378 and 1423 respectively.

### **Legislative Affairs**

Upcoming Meetings:

Currently, there are no meetings scheduled.

Upcoming Hearings:

Currently, there are no hearings scheduled.

### **Social Media**

YouTube video embedded on IRS.gov this week:

- Tax Scams <https://www.youtube.com/watch?v=0y5z0kWgBcM>
- Tax Scams (ASL version) <https://www.youtube.com/watch?v=X8Ne6yUkAms>
- Nationwide Tax Forums (possible)  
<https://www.youtube.com/watch?v=RQxa8HaElvg>

IRS.gov front page - Rotating Spotlight

- Summer Tax Tips
- Security Summit – Replace with Choosing a Tax Preparer (4 part series)
- Get the Facts - transcript incident
- Identity Theft
- Health Care and Taxes

IRS.gov front page – News

- Tax Benefits and Services for Disabled Taxpayers
- Follow IRS on Tumblr (Replace with Phone Scam Release)
- Penalty Relief for Certain Small Businesses
- 2015 IRS Nationwide Tax Forums

Twitter

- Summer Tip - Aug. 3, 2015 STT-2015-14 Back-to-School Education Tax Credits
- Summer Tip - Aug. 5, 2015 STT-2015-15 IRS Tax Tips for Starting a Business
- Summer Tip - Aug. 7, 2015 STT-2015-16 Eight Things to Know about the Taxpayer Advocate Service
- Choosing a Tax Preparer (4 part series)
- Daily ACA tweets
- HealthCare TT 2015-42: Employers Providing Self-Insured Health Coverage Must Report on Information Returns
- HealthCare TT 2015-43: It's Time for a Mid-Year Premium Tax Credit Checkup
- HealthCare TT 2015-44: Find Out if Your Health Coverage is Qualifying Coverage under the Health Care Law
- HealthCare TT 2015-45: Overview of the Employer Shared Responsibility Provisions
- #IRS webinars to explain #HealthCare Law to #employers and coverage providers <http://go.usa.gov/3fJVC>
- Answers to questions about how seasonal workers affect your applicable large employer status <http://go.usa.gov/3532w>
- Truckers – Form 2290, August 31 deadline
- Nationwide Tax Forums
- Daily YouTube video tweets

Tumblr posts scheduled for this week:

- HCTT #43, It's Time for a Mid-Year Premium Tax Credit Checkup
- ACA Change in Circumstances
- San Diego Tax Forum
- Summer Tax Tips - #14 (Monday), #15 (Wednesday), #16 (Friday)
- STTT #14 - Part time and Summer Jobs
- STTT #15 – Starting a Business
- STTT #16 – Taxpayer Advocate Service
- Office of Appeals
- SSA/IRS Reporter
- Beware of Fake Charities

## **Visual Education and Communications**

Live/Taped Broadcasts:

- N/A

Streaming Assisted Events:

- N/A

YouTube Postings

- English:
  - IRS2Go
- Spanish:
  - N/A
- ASL:
  - N/A

Centra Captions:

- EP: ESOPS Part 1 (08/03)

- EP: ESOPS Part 2 (08/03)
- EP: Trust Assets (08/04)
- EP: 401 (a)(9) (08/04)
- RAC Call - How to Write Case Analysis (08/05)
- Poor Performers & Performance Improvement Plans (08/05)
- FSLG FY15 CPE – Section 218 (08/06)
- R&A Town Hall EOY (08/06)
- FSLG FY15 CPE - IRC Section 3401(D)(1) - Third Party Payers (08/06)
- EP: Tech Advice Part 1 (08/07)
- EP: Tech Advice Part 2 (08/07)

Other Projects:

- Build & Light/Rehearsal - W&I Field Assistance CPE 2016 (08/03)
- Editing & Graphics Creation: W&I CPE 2016 (08/03-08/07)
- English YouTube IRS2Go Avid Edit (08/03-08/07)
- Taping - W&I FA CPE 2016: Service Approach penalty Abatement Authority (08/04-08/07)
- TAS Avid Edit (08/04-08/05)

Service-Wide Video Editorial Board (SVEB):

Ten video requests are up for review this week and are pending SVEB and Deputy Commissioner approval. They are:

- YouTube Request #69 –YouTube -2016 IRS Tax Calendar Online
- YouTube Request #70 – ACA Employer Provisions – Are you an ALE?
- YouTube Request #71 – ACA Employer Shared Responsibility Provision (Section 4980H)
- YouTube Request #72 – ACA Employer Information Reporting (6056)
- YouTube Request #73 – ACA Employer Provisions Overview
- YouTube Request #74 – ACA Provider Information Reporting (Section 6055)
- Request #350 – LBI Organizational Initiative Launch Video
- Request #358 – TEGE StayExempt.irs.gov Training Course: *Form 990* Overview
- Request #359 – SBSE Tax Preparers: Safeguarding taxpayer data and preventing identity theft Webinar
- Request #360 – HCO Executive Engagement Session via Webcast

## **Communications and Liaison – Weekly Activity Report Week of July 27, 2015**

### **Internal Communications**

#### IRS Headlines

- Explore career development resources, free Harvard courses in latest training newsletter (HCO)
- Monitor your leave balances, including use or lose (AWSS)

#### Leaders' Alert

- Use Form 14703 for Post of Duty change requests (HCO)
- [Refer taxpayer discrimination complaints to EDI's Civil Rights Division](#) (EDI)
- Senior managers: Become a better leader through the Continuous Leadership Journey (HCO)
- Attend Aug. 5 webinar to help employees improve performance (HCO)

#### Daily News (webbies)

- Contracting officer's representatives: Submit proper form when a contractor leaves (AWSS)
- Safeguard your SmartID and PIN at all times (AWSS)

#### Poll questions

- Which is a feature of the Canon Copier Multifunctional Devices? (IT)

#### Spotlight

- Manage your moolah (Multiple)

#### Other News

IRS Cares: The circle of life (saving) (SB/SE)

### **National Media Relations**

News releases/Fact Sheet for week of July 27th:

- Preparedness Series: Choosing a Tax Preparer(Yadira)

News releases/Fact Sheets for coming weeks:

- Get Transcript (Tentative)
- Updated Phone Scams release with possible tie in to the CP2000 issue

### **National Public Liaison**

Stakeholder Relationship Management Branch

Wednesday Aug. 5th – Commissioner Koskinen greets attendees at Latino Tax Professionals National Convention via recorded video message.

Liaison and Tax Forums Branch

Participant registration for the 2015 IRS Nationwide Tax Forums is now just over 8200. The final reported attendance for National Harbor was 1915 paid registrants. There are

currently 1386 individuals registered for the Denver Colorado Tax Forum which begins July 28<sup>th</sup> and runs through July 30<sup>th</sup>. The remaining cities on the schedule include San Diego, Atlanta and Orlando with 1763, 1278 and 1320 respectively.

## **Legislative Affairs**

NOT IRS AGENCY RECORDS



### Upcoming Hearings:

On Wednesday, July 29, 2015, a hearing is scheduled to be held before the Senate Committee on the Judiciary's Subcommittee on Oversight, Agency Actions, Federal Rights and Federal Courts on "Revisiting IRS targeting: Progress of Agency Reforms and Congressional Options". The hearing is scheduled for 2:00 pm in room 106 of the Dirksen Senate Office Building.

Witness: Commissioner, Koskinen is scheduled to testify.

On Wednesday, August 5, 2015, Senate Judiciary Committee will hold a hearing on Inspector General access issues generally, and the use of grand jury secrecy rules as a reason to deny IG access specifically. The hearing will focus on the IG access issues related to grand jury material in TIGTA report 2014-30-081, September 19, 2014. The hearing time and room are TBD.

Witness: Commissioner, Koskinen is scheduled to testify.

Other Witnesses: Department of Justice and the DOJ Inspector General Department of Justice, Federal Bureau of Investigation, the Deputy Attorney General's office and TIGTA have also been invited.

## **Social Media**

YouTube video embedded on IRS.gov this week:

- ID Theft, First step for victims
- Telephone Scams (possible)
- ACA/HealthCare video (possible)
- IRS Tax Forums (possible)

IRS.gov front page - Rotating Spotlight

- Security Summit
- Summer Tax Tips
- Get the Facts - transcript incident
- Identity Theft
- Health Care and Taxes

IRS.gov front page – News

- Follow IRS on Tumblr
- Penalty Relief for Certain Small Businesses
- Proposed Tax Guidelines for ABLE Accounts

- 2015 IRS Nationwide Tax Forums

#### Twitter

- Summer Tax Tip #11 - No Need to Wait Until Oct. 15 Extension Deadline to File
- Summer Tax Tip #12 - Tips on Travel While Giving Your Services to Charity
- Summer Tax Tip #13 - Ten Key Tax Facts about Home Sales
- Health Care Tax Tip #42 - Self-Insured Employers Must File Health Coverage Information Returns
- Health Care Tax Tip #43 - It's Time for a Mid-Year Premium Tax Credit Checkup
- #IRS webinars on #HealthCare Law <http://go.usa.gov/3fJVC>
- IRS "What's Trending" #ACA webpage <http://go.usa.gov/3jwTB>
- IRS trucking #tax center, E-file form 2290 <http://go.usa.gov/TPyW>
- Nationwide Tax Forums
- Daily YouTube video tweets
- Daily ACA tweets

#### Tumblr posts scheduled for this week:

- Summer Tax Tip #11: Don't Wait Until Oct. 15
- Summer Tax Tip #12: Charitable Travel
- Summer Tax Tip #13: Sale of Home
- Health Care Tax Tip #41
- Health Care Tax Tip #42
- SSA/IRS Reporter
- Independent Contractor (En Espanol)
- Life Change = Change in Circumstances (En Espanol)
- SSA/IRS Reporter (En Espanol)
- Denver Tax Forum

### **Visual Education and Communications**

#### Live/Taped Broadcasts:

- N/A

#### Streaming Assisted Events:

- N/A

#### YouTube Postings

- English:
  - N/A
- Spanish:
  - N/A
- ASL:
  - N/A

#### Centra Captions:

- Fundamentals of UBIT Law and Application (07/27)
- Recognizing and Examining 502(c)(7) Social Clubs (07/28)
- Engagement - Why It's More Important than Ever (07/28)
- L&E Soft Skill Class - Critical Thinking (07/29)
- IRS U Webinar: Online Etiquette (07/29)
- Private Foundations Overview (07/29)
- Charitable Hospitals and the Affordable Care Act (07/29)

- Accommodating Employees With MS (07/29)
- Foreign Conduits and FBAR Awareness (07/30)
- L&E Soft Skills Class - Customer Satisfaction (07/30)

Other Projects:

- POR- Contractor Version Avid Edit (07/27-07/28)
- SBSE Mega Taping (07/27-07/31)
- SBSE AJAC Taping (07/28)
- HCO ACA Video Avid Edit (07/29-07/31)
- SBSE AJAC Avid Edit (07/29-07/31)

Service-Wide Video Editorial Board (SVEB):

Seven video requests are up for review this week and are pending Deputy Commissioner approval. They are:

- Request #351 – TEGE An Introduction to Tax-exempt Bonds for First Time Issuers
- Request #352 – TEGE Information for First Time Issuers of Tax Exempt Bonds – Introduction to Private Business Use
- Request #353 – TEGE Information for First Time Issuers of Tax Exempt Bonds – Introduction to Arbitrage
- Request #354 – TEGE FSLG TIN Matching to the Rescue
- Request #355 – TAS ACA Training Videos for Low Income Taxpayer Clinics (LITC)
- Request #356 – TAS Developing Persuasive Writing Skills for Conducting Internal Management Document Reviews-TBOR in IRMs

Request #357 – TAS Affordable Care Act – Update



# **Communications and Liaison – Weekly Activity Report**

## **Week of August 10, 2015**

### **Internal Communications**

#### IRS Headlines

- Order printed tax reference materials by Aug. 31(W&I)

#### Leaders' Alert

- Remind your employees of Hatch Act prohibitions (HCO)
- EEFax is the IRS's new standard (IT)
- Seasonal managers: Remember to designate an ePerformance proxy if you're furloughed (AWSS)
- Know your responsibilities when you approve requests for religious compensatory time (HCO)
- Order hard copies of the 2016 National Agreement contract for your bargaining unit employees (HCO)
- Get results from your meetings by using an IRS facilitator (HCO)
- Review each SETR entry to ensure accuracy before signing it (AWSS)

#### Poll Questions

- How can you keep your computer healthy? (IT)
- In what year did the date for filing individual tax returns change from March 15 to April 15? (RAS)

#### Spotlight

- Professional Speakers Day (Multiple BUs)
- Birds of a feather travel together (IRS adventures) (Multiple BUs)

#### Daily News

- Federal Employee Viewpoint Survey participation rates highest since 2011 (HCO)
- Beginning Aug. 17, 2015, IRS has a new travel management center (AWSS)
- Learn the symptoms, accommodation ideas for employees with lupus (EDI)
- Is your workplace ready for Generation Z? (EDI)

#### Commissioner news

Koskinen meets with Employee Organization leaders (EDI)

### **National Media Relations**

#### News releases for week of August 10th:

- ACT Member Solicitation

#### News release possible for coming weeks:

- Tax Preparedness
- Back to School Tips

## **National Public Liaison**

### Liaison and Tax Forums Branch

The Liaison and Tax Forums Branch will resume its series of Tax Forums this week in San Diego, California from August 11th - 13th. SB/SE Commissioner Karen Schiller will deliver the keynote address. The audience is expected to exceed 2000 participants.

The final two cities on the schedule include Atlanta from August 25th - 27th and, Orlando beginning on September 1st. Attendance thus far for the remaining events, are 1618 and 1643 respectively.

### Professional Stakeholder Relationship Management Branch

IRPAC will be meeting for a working session on August 18th -19th. They will have a presentation from Ken Corbin on the Security Summit. This is their last working session before they present the Public Report to Commissioner Koskinen on October 28th during a Public Meeting.

## **Legislative Affairs**

### Upcoming Meetings:

Currently, there are no meetings scheduled.

### Upcoming Hearings:

Currently, there are no hearings scheduled.

## **Social Media**

YouTube video embedded on IRS.gov this week:

- Tax Scams <https://www.youtube.com/watch?v=0y5z0kWgBcM>
- Tax Scams (ASL version) <https://www.youtube.com/watch?v=X8Ne6yUkAms>
- Nationwide Tax Forums (possible)  
<https://www.youtube.com/watch?v=RQxa8HaElvg>

### IRS.gov front page - Rotating Spotlight

- Summer Tax Tips
- Security Summit
- Get the Facts - transcript incident
- Identity Theft
- Health Care and Taxes

### IRS.gov front page – News

- Guard Against New Tricks by Scam Artists
- Penalty Relief for Certain Small Businesses
- Tax Benefits and Services for Disabled Taxpayers
- 2015 IRS Nationwide Tax Forums

### Twitter

- Summer Tax Tip - Aug. 10 IRS Offers Easy-to-Use Online Tools
- Summer Tax Tip - Aug. 12 Don't Fall for New Tax Scam Tricks by IRS Posers
- Summer Tax Tip - Aug. 14 IRS Tips to Help People Pay Their Taxes

- Daily ACA tweets
- HealthCare Tax Tips #46 – #49
- Back-to-School Education #Tax Credits [go.usa.gov/3A8RT](http://go.usa.gov/3A8RT) #IRS
- #IRS webinars to explain #HealthCare Law to #employers and coverage providers <http://go.usa.gov/3fJVC> (Aug. 20 & Sept. 16)
- #IRS rebroadcasts free webinar on payments to independent contractors Aug. 19. Earn 1 CE credit. <http://go.usa.gov/knUY> #smallbiz
- Truckers – Form 2290, August 31 deadline
- Nationwide Tax Forums
- Daily YouTube video tweets

Tumblr posts scheduled for this week:

Monday

- STTT #17 Online Tools
- Payments to Independent Contractors Webinar

Tuesday

- Truckers Form 2290 – [www.irs.gov/truckers](http://www.irs.gov/truckers)
- San Diego Tax Forum

Wednesday

- STTT #18 Tax Scams
- ID Theft: FAQs for Victims (video)

Thursday

- Change in Circumstance (SP)
- Summer Day Camp Expenses

Friday

- STTT #19 - IRS Tips to Help People Pay Their Taxes
- Payments to Independent Contractors Webinar

## **Visual Education and Communications**

Live/Taped Broadcasts:

- 2016 National Agreement Training (Rm 2136@1111) Polycom/Centra (08/11)
- 2016 National Agreement Training (NCFB Auditorium) Polycom/Centra (08/12-08/13)

Streaming Assisted Events:

- N/A

YouTube Postings

- English:
  - N/A
- Spanish:
  - N/A
- ASL:
  - N/A

Centra Captions:

- RA: Medical Confidentiality and Disclosure for CI Managers (08/11)
- Career Learning Plan (08/11)
- TEB/EO Cross-functional Town Hall (08/11)
- Supporting Employees Success: The Coaching Approach (08/12)
- Pre Open Enrollment Session (08/13)

Other Projects:

- Offline Editing - W&I CPE 2016 (08/10-08/14)
- Message From Deputy Commissioner (Dalrymple) Avid Edit (08/11-08/12)
- LB&I Build & Light (08/12)
- LB&I Dep. Comm. John Dalrymple Taping – 1111 Studio (08/12)
- Audio Recording - SBSE Business Taxes for the Self-Employed (08/12)
- Offsite Edit - LB&I Executive Conops Launch (08/13-08/14)

Service-Wide Video Editorial Board (SVEB):

Two video requests are up for review this week and are pending SVEB and Deputy Commissioner approval. They are:

- Request VR#361 - W&I's Roadmap for the Future Video

Request #350 – LBI Organizational Initiative Launch Video

# **Communications and Liaison – Weekly Activity Report**

## **Week of August 17, 2015**

### **Internal Communications**

#### IRS Headlines

- You may request time off for religious observances (HCO)
- Watch a new video: Changing your accounting code in SETR (AWSS)
- Are you entitled to Sunday premium pay? (AWSS)
- Know who to call for payroll or HR Connect issues (AWSS)

#### Leaders' Alert

- Remind employees to avoid forfeiting time-off awards (AWSS)
- New managers: Learn how to better administer employees' time and leave (AWSS)

#### Other News

- IRS Cares: Patient practices patience to save her doctor's life (SBSE)

#### Poll Question

- How do you restore a deleted item on a SharePoint 2010 site? (IT)

#### Spotlight

- A mutt-ley crew (World Mutt-i-grees Rescue Month) (Multiple)

#### Daily News

- Change to the Concur reviewer/approval process for IE8 users (AWSS)
- New travel management center means new processes (AWSS)

### **National Media Relations**

#### **National Public Liaison**

##### Liaison and Tax Forums Branch

Liaison and Tax Forums Branch resumed its series of Tax Forums last week in San Diego, California. SB/SE Commissioner Karen Schiller delivered the keynote address. The attendance exceeded 2100 participants.

The final two cities on the schedule include Atlanta from August 25th -27th and, Orlando beginning on September 1st. Attendance thus far for the remaining events, are 2167 and 2202 respectively.

##### Business Stakeholder Relationship Management Branch

Tues. Aug. 18, 10:00 a.m. – National Small Business Forum. U.S. Chamber of Commerce, Washington, D.C. IRS Speakers include Marie Cashman-Kolczynski and Phil Lindenmuth, ACA Office, and (b) (6)

Professional Stakeholder Relationship Management Branch

Tues. Aug. 18, Weds. Aug. 19 – The Information Reporting Program Advisory Committee (IRPAC) convenes for working session at IRS Headquarters. Ken Corbin, Director, Return Integrity and Compliance Services, will update the Committee on the Security Summit.

### **Legislative Affairs**

Upcoming Meetings:

Currently, there are no meetings scheduled.

Upcoming Hearings:

Currently, there are no hearings scheduled.

### **Social Media**

YouTube video embedded on IRS.gov this week:

- Tax Scams <https://www.youtube.com/watch?v=0y5z0kWgBcM>
- Tax Scams (ASL version) <https://www.youtube.com/watch?v=X8Ne6yUkAms>
- Nationwide Tax Forums (possible)  
<https://www.youtube.com/watch?v=RQxa8HaElvg>

IRS.gov front page - Rotating Spotlight

- Summer Tax Tips
- Back to School (new)
- Get the Facts - transcript incident
- Identity Theft
- Health Care and Taxes

IRS.gov front page – News

- Guard Against New Tricks by Scam Artists
- Tax Benefits and Services for Disabled Taxpayers
- Penalty Relief for Certain Small Businesses
- 2015 IRS Nationwide Tax Forums

Twitter

- Summer Tax Tip - Aug. 17 - Moving Expense Deduction
- Summer Tax Tip - Aug. 19 - Get Tax Help with Social Media
- Summer Tax Tip - Aug. 21 - Become a Tax Volunteer and Make a Difference in Your Community
- Daily ACA tweets
- HealthCare Tax Tips #50 – #52
- Back-to-School Education #Tax Credits [go.usa.gov/3A8RT](http://go.usa.gov/3A8RT) #IRS
- #IRS offers #HealthCare webinar series in July, Aug, and Sept for #Employers and Coverage Providers <http://go.usa.gov/3fJVC> #tax #ACA
- #IRS rebroadcasts free webinar on payments to independent contractors Aug. 19. Earn 1 CE credit. <http://go.usa.gov/knUY> #smallbiz

- Truckers – Form 2290, August 31 deadline
- Nationwide Tax Forums
- Daily YouTube video tweets

Tumblr posts scheduled for this week:

Monday - 8/17

- HCTT #44
- Truckers Form 2290
- STTT #20: Moving Expenses

Tuesday 8/18

- HCTT #45
- Tax Help for people with disabilities
- Beware Tax Scams

Wednesday 8/19

- HCTT #46
- Independent Contractors Webinar
- STTT #21: IRS Social Media

Thursday 8/20

- HCTT #47
- Atlanta Tax Forum
- SSA/IRS Reporter

Friday 8/21

- HCTT #48
- STTT #22: VITA TCE
- Truckers Form 2290

### **Visual Education and Communications**

Live/Taped Broadcasts:

- HCO Executive Engagement Session (@1111) Polycom/Stream (08/18)
- Estate & Gift Tax FY2015 CPE – Live Stream (08/19-08/20)

Streaming Assisted Events:

- N/A

YouTube Postings

- English:
  - N/A
- Spanish:
  - N/A
- ASL:
  - N/A

Centra Captions:

- USAJobs Career Connector/Resume Writing/Doc Requirements (08/19)
- Using ELMS to Develop People (08/19)

- Accommodating Employees With Lupus (08/19)
- Learn & Lead 24x7 (08/20)

Other Projects:

- Offline Editing - W&I CPE 2016 (08/17-08/21)
- Offsite Edit - LB&I Executive Conops Launch (08/17)
- Rehearsal/Taping - Estate & Gift Tax FY2015 CPE (08/18)
- Audio Recording - Captivate Overview (08/18)
- HCO Executive Engagement Session - Avid Edit (08/19-08/21)
- ASL Tax Tips IRS 2.GO 5.2 – Avid Edit (08/19)

Service-Wide Video Editorial Board (SVEB):

One video request is up for review this week and is pending SVEB and Deputy Commissioner approval. It is:

YT Request VR#75 – Annual Filing Season Program (AFSP)



## **Communications and Liaison – Weekly Activity Report Week of August 24, 2015**

### **Internal Communications**

#### IRS Headlines

- Participate in the IRS College Credit Program virtually (HCO)
- Order free UPS inner packaging supplies (W&I)
- Keep your contact information in HR Connect up to date (AWSS)
- Know how to properly manage your records (PGLD)
- Know when to expect your lump sum annual leave payment once you retire (AWSS)
- Non-pay time, such as leave without pay, can affect overtime (AWSS)

#### Leaders' Alert

- Use engagement toolkit and podcasts to help improve employee engagement in your work unit (HCO)
- Email announcing location self-certification is on the way (AWSS)
- Comply with guidelines when signing time and attendance records (AWSS)

#### Poll questions

- Are you signed up for the Concur Traveler's Toolkit RSS feed? (AWSS)
- What should you do if you key in an incorrect Social Security Number or Employer Identification Number and access the wrong taxpayer's account? (PGLD)

#### Spotlight

- Watching your virtual Ps and Qs (email etiquette) (C&L)

#### Other News

- Spirit of IRS: Not lost in translation (TE/GE)

### **National Media Relations**

#### **National Public Liaison**

##### Tax Forums and Liaison Branch

The Tax Forums and Liaison Branch resumed its series of Tax Forums this week in Atlanta, GA. Wage and Investment Commissioner, Deborah Holland will deliver the keynote address. Attendance in Atlanta exceeds 2100 participants. The branch will wrap up its events in Orlando, Florida from September 1<sup>st</sup> through 3<sup>rd</sup> where attendance has reached 2664 paid participants.

## Business Stakeholder Relationship Management Branch

On August 25-26, the Reporting Agent Forum will be held at the New Carrollton Federal Building in Room B1-112. Jim Clifford, Assistant Deputy Commissioner for Services and Enforcement will be meeting with them on IRS updates.

### **Legislative Affairs**

Upcoming Meetings:

Currently, there are no meetings scheduled.

Upcoming Hearings:

On Wednesday, August 26, 2015, a hearing is scheduled to be held before the Senate Budget Committee's Government Performance Task Force on identity theft. This field hearing is scheduled for 2:00 pm in Manchester, NH.

Witness: Commissioner, Koskinen is scheduled to testify.

### **Social Media**

*YouTube video embedded on IRS.gov this week:*

- *Tax Scams (ASL version)* <https://www.youtube.com/watch?v=X8Ne6yUkAms>
- *Tax Scams* <https://www.youtube.com/watch?v=0y5z0kWgBcM>
- *IRS2Go 5.2 (possibly ready this week – pending approval & marketing strategy)*

*IRS.gov front page - Rotating Spotlight*

- *Summer Tax Tips*
- *Back to School*
- *Get the Facts - transcript incident*
- *Identity Theft*
- *Health Care and Taxes*

*IRS.gov front page – News*

- *Truckers' Highway Use Tax Return Due Aug. 31*
- *Guard Against New Tricks by Scam Artists*
- *Tax Benefits and Services for Disabled Taxpayers*
- *2015 IRS Nationwide Tax Forums*

*Twitter*

- *Summer Tax Tip - Aug. 24 - STT-2015-23 Key Tax Tips on the Tax Effects of Divorce or Separation*
- *Summer Tax Tip - Aug. 26 - STT-2015-24 Job Search Expenses May be Deductible*
- *Summer Tax Tip - Aug. 28 - STT-2015-25 Boost Your Tax Knowledge with a Free Learning Program from the IRS*
- *Truckers – Form 2290, August 31 deadline*
- *HealthCare Tax Tips #50 <http://go.usa.gov/36cfF> & #51 <http://go.usa.gov/362fe>*
- *Back-to-School Education #Tax Credits [go.usa.gov/3A8RT](http://go.usa.gov/3A8RT) #IRS*
- *#IRS webinars to explain #HealthCare Law to #employers and coverage providers <http://go.usa.gov/3fJVC> (Sept. 16)*

- *Daily YouTube video tweets*
- *Daily ACA tweets*
- *Nationwide Tax Forums*
  - *Atlanta, GA Aug. 25 – 27*
  - *Orlando, FL Sept. 1 – 3*

*Tumblr posts scheduled for this week:*

*Monday 8/24:*

*STTT #23: Divorce*

*SBSE The Basics webinar*

*Tuesday 8/25:*

*VITA TCE*

*Moving Expenses (video)*

*Wednesday 8/26:*

*STTT #24: Job Search Expenses*

*SBSE The Basics webinar*

*Thursday 8/27:*

*Back to School*

*Beware fake charities*

*Friday 8/28:*

*STTT #25 Understanding Taxes*

- *Tax Scams (video)*

## **Visual Education and Communications**

*Live/Taped Broadcasts:*

- *Estate & Gift Tax FY15 CPE Day 1 of 2 – Rebroadcast Stream (08/26)*
- *Estate & Gift Tax FY15 CPE Day 2 of 2 – Rebroadcast Stream (08/27)*

*Streaming Assisted Events:*

- *N/A*

*YouTube Postings*

- *English:*
  - *N/A*
- *Spanish:*
  - *N/A*
- *ASL:*
  - *N/A*

*Centra Captions:*

- *HCO 3rd Quarter Virtual Recognition Ceremony (08/25)*
- *Accrued Benefit Calculations and Other Corrections (08/26)*
- *HCO Focus Day - Data Analysis (Session 1) (08/27)*
- *IRS Section 436 Benefit Restriction Issues (08/27)*

*Other Projects:*

- *Offline Editing - W&I CPE 2016 (08/24-08/28)*

Service-Wide Video Editorial Board (SVEB):

- N/A

# **Communications and Liaison – Weekly Activity Report**

## **Week of August 31, 2015**

### **Internal Communications**

#### Commissioner News

- Deputy Commissioner Jeff Tribiano visits NCFB (DCOS)
- The importance of Equal Employment Opportunity (EDI)

#### IRS Headlines

- Commissioner holds virtual town halls with Texas employees (IC)
- Email announcing location self-certification is on the way (AWSS)
- You can change a life through the Combined Federal Campaign (AWSS)

#### Leaders' Alert

- Attend Sept. 9 and 17 Centra sessions to learn about knowledge management and emotional intelligence (HCO)

#### Poll Question

- How can you best manage your password? (IT)
- What basic element must be included in a suggestion to the Employee Suggestion Program for it to be considered acceptable? (HCO)

#### Spotlight

- School is back in session (W&I)

#### Daily News

- September is National Preparedness Month (AWSS)
- Fiscal year 2016 GSA airfare contracts awarded (AWSS)

### **National Media Relations**

### **National Public Liaison**

#### Liaison and Tax Forum Branch

Tax Forums Branch concluded its educational program in Atlanta Georgia. Attendance reached 2271 participants. The event in Orlando, Florida September 1-3 will complete the 2015 outreach. This city will have the largest attendance for all cities with over 2700 tax professionals. Commissioner Koskinen will deliver the keynote address.

The Internal Revenue Service Advisory Council (IRSAC) will have its fourth working session in Washington, DC on September 9th and 10th. Commissioner Koskinen is on the IRSAC agenda as well.

### **Legislative Affairs**

## Upcoming Meetings:

NOT IRS AGENCY RECORDS



## Upcoming Hearings:

On Wednesday, September 9, 2015, a hearing is scheduled to be held before the Senate Committee on Homeland Security and Governmental Affairs titled "The IRS Data Breach: Steps to Protect Americans' Personal Information – Part II." The hearing is scheduled for 10:00 am in room 342 of the Dirksen Senate Office Building.

Witness: Commissioner, Koskinen is scheduled to testify

## **Social Media**

### **Visual Education and Communications**

#### Live/Taped Broadcasts:

- TAS Developing Persuasive Writing Skills for Conducting IRM Reviews – LIVE/Stream (09/01)

#### Streaming Assisted Events:

- N/A

#### YouTube Postings

- English:
  - IRS2Go 5.2
- Spanish:
  - IRS2Go 5.2
- ASL:
  - IRS2Go 5.2

#### Centra Captions:

- 2016 National Agreement Training (09/01-09/03)
- LIVE Meeting with Lync 2010 Overview (09/01)
- Correction Of Certain Failures (09/02)
- Multiemployer Plan-IRM Update Part 1 (09/02)
- Multiemployer Plan-IRM Update Part 2 (09/03)

- RAC Call - Refresher Reassignment (09/03)

Other Projects:

- Offline Editing - W&I CPE 2016 (08/31)
- DVD Authoring & Close Caption: W&I CPE 2016 (09/01-09/04)
- Deputy Commissioner Taping(NCFB Auditorium) (09/01)
- SBSE: How to Claim Simplified Home DeductionsTaping (09/02)

Service-Wide Video Editorial Board (SVEB):

Eight video requests are up for review this week and are pending Deputy Commissioner approval. They are:

- YouTube Request#76 – Extension of Time to File Video
- YouTube Request#77 – Filing Status video
- YouTube Request#78 – Individual Taxpayer Identification Number (ITIN) video
- YouTube Request#79 – Get Help in Spanish video
- Request #364 – TEGE Captivate presentation for Congressional Staffers
- AMENDED Request #351 – TEGE An Introduction to Tax-exempt Bonds for First Time Issuers
- AMENDED Request #352 – TEGE Information for First Time Issuers of Tax Exempt Bonds – Introduction to Private Business Use
- AMENDED Request #353 – TEGE Information for First Time Issuers of Tax Exempt Bonds – Introduction to Arbitrage

# **Communications and Liaison – Weekly Activity Report**

## **Week of September 14, 2015**

### **Internal Communications**

#### IRS Headlines

- Bargaining Unit teleworkers must have revised telework agreement approved by 10/30 (HCO)

#### Leaders' Alert

- Approve all employee telework agreements by Sept. 30 (HCO)
- Complete your mandatory 2016 National Agreement training by 9/30; Agreement now available online (HCO)

#### Poll Question

- What are the priority issues TAS will address in fiscal year 2016, according to the National Taxpayer Advocate's FY 2016 Objectives Report to Congress? (TAS)
- Which IRS online publication is for businesses, payroll professionals and others who work with payroll taxes and employment tax issues? (SBSE)

#### Spotlight

- The Constitution: A timeless story (Constitution Day) (C&L)
- Define yourself, make a difference (Hispanic Heritage Month) (EDI)
- Helping others find their way (suicide prevention) (SBSE)

#### Daily News

- From ship to shore, the IRS ensures compliance (DCSE)
- Understand and uphold your ethical responsibilities as an IRS employee (multiple)

### **National Media Relations**

News releases for week of September 14th:

- ALE Information Center Launch (1095-A)

News release possible for coming weeks:

- Oct 15<sup>th</sup> Deadline Reminder

### **National Public Liaison**

Professional Stakeholder Relationship Management Branch



Thur. Sept. 17– NPL Liaison Meeting. Commissioner Koskinen and RICS Director Ken Corbin update IRS partners on the Security Summit. The agenda also includes presentations on certified professional employer organizations, the SBSE Failure to Deposit Alert initiative and ACA issues. Room 2140.

Fri. Sept. 18 – Deputy Commissioner Dalrymple speaks at the AFIRE meeting, Ellicott City.

### **Legislative Affairs**

Upcoming Meetings:

Currently, there are no meetings scheduled.

Upcoming Hearings:

On Wednesday, September 30, 2015, a hearing has been rescheduled to be held before the Senate Committee on Homeland Security and Governmental Affairs titled “The IRS Data Breach: Steps to Protect Americans’ Personal Information – Part II.” The hearing is scheduled for 10:00 am in room 342 of the Dirksen Senate Office Building.

Witness: Commissioner, Koskinen is scheduled to testify.

### **Social Media**

YouTube video embedded on IRS.gov this week:

- IRS2Go 5.2
- Is your Social Security Income taxable?

IRS.gov front page - Rotating Spotlight

- Emergency Planning
- Back to School
- Get the Facts - transcript incident
- Identity Theft
- Health Care and Taxes

IRS.gov front page – News

- National Preparedness Month: Are You Ready for Emergencies?
- October 15 deadline (replace: Follow IRS on Tumblr)
- Guard Against New Tricks by Scam Artists
- Tax Benefits and Services for Disabled Taxpayers

Twitter

- HealthCare Tax Tip #54 <http://go.usa.gov/3F66R> - Moving this Year? If You Receive the Premium Tax Credit, Report this Life Event.
- HealthCare Tax Tip #55 <http://go.usa.gov/3Mdxz> - What Information Must a Health Coverage Provider Report to the IRS?
- Try IRS.gov before you call - tax tools <http://irs.gov/uac/Tools>
- October 15 deadline
- Get Transcripts by mail <http://go.usa.gov/3AKcF>
- ACA estimator tools bring healthcare tax credits, payments into focus <http://go.usa.gov/3f24g>
- Direct Deposit

- Daily YouTube video tweets
- Daily ACA tweets

Tumblr posts scheduled for this week:

Monday 9/14: Preparing for Disasters  
Back to School

Tuesday 9/15: VITA TCE  
Payment Options

Wednesday 9/16: Preparing for Disasters  
Calling the IRS? Try IRS.gov

Thursday 9/17: VITA TCE  
Tax Preparer Directory

Friday 9/18: Preparing for Disasters  
IRS2Go 5.2

### **Visual Education and Communications**

Live/Taped Broadcasts:

- N/A

Streaming Assisted Events:

- N/A

YouTube Postings

- English:
  - N/A
- Spanish:
  - N/A
- ASL:
  - N/A

Centra Captions:

- 2016 National Agreement Training (09/15-09/17)
- Empowerment - The Art of Possibility (09/15)
- Self-Identify Disability (09/16)
- New Guidance on Videos and Video Services (09/17)
- Emotional Intelligence (09/17)
- PDB Multi-Media 101 (09/17)
- All GLC Summit - Q4 Leadership Discussion (09/17)

Other Projects:

- DVD Authoring & Close Caption: W&I CPE 2016 (09/14-09/18)
- 1501- New Employee Orientation Avid Edit (09/14-09/18)
- SBSE Home Office Deductions Avid Edit (09/15-09/18)

Service-Wide Video Editorial Board (SVEB):

Six video requests are up for review this week and are pending Deputy Commissioner approval. They are:

- YouTube Request #80 – Free Help Preparing Your Return
- YouTube Request #81 – VITA Recruitment
- YouTube Request #82 – Do-It-Yourself Free Tax Preparation
- YouTube Request #83 – YouTube Video: Claiming HCTC on Your 2015 Tax Return
- YouTube Request #84 – Free Help for Taxpayers
- Request #365 –UNS Town Hall “Positioning Ourselves for Success” via webcast

# **Communications and Liaison – Weekly Activity Report**

## **Week of September 21, 2015**

### **Internal Communications**

#### IRS Headlines

- Taxpayer Data Access form now available with digital signature capability (PGLD)
- Keep packages, including case files, under 30 pounds (Appeals)
- All teleworkers must have signed and approved telework agreements on file (HCO)
- Suicide threats require calm, specific actions (PGLD)
- Don't fall victim to phishing scams (IT)

#### Leaders' Alert

- Managers: Upload all employee telework agreements by Nov. 30 (HCO)
- Only mark the "Final T&A" and "End Day" SETR fields when an employee separates (AWSS)
- Some employees will receive outstanding cost-of-living allowance (AWSS)
- Deadline extended to conduct outside employment tasks (HCO)

#### Daily News (webbies)

- Collaboration pays off with TE/GE Employee Plans examination (DCSE)
- Watch pre-retirement and other benefit videos, available 24/7 (HCO)
- HR Connect unavailable 9/25 – 9/28 (AWSS)

#### Poll questions

- 2015 marks which anniversary for the National Book Festival? (RAS)
- How can you troubleshoot when you have trouble with your computer? (IT)

#### Spotlight

- The art of speaking ... and listening (Toastmasters) (Multiple)

#### Other News

- Spirit of IRS: Carrying Joan's torch (IT)

### **National Media Relations**

#### News releases for week of September 14th:

- Possible FATCA release (TBD)

#### News release possible for coming weeks:

- Oct 15<sup>h</sup> Deadline Reminder

### **National Public Liaison**

#### Professional Stakeholder Relationship Branch

Friday Sept. 25 – Federal Bar Association planning meeting. Chief Counsel Bill Wilkins will speak. Room 3313.

### **Legislative Affairs**

### Upcoming Hearings:

On Tuesday, September 29, 2015, a hearing has been tentatively scheduled to be held before the Senate Committee on Homeland Security and Governmental Affairs titled "The IRS Data Breach: Steps to Protect Americans' Personal Information – Part II." The hearing is scheduled for 10:00 am in room 342 of the Dirksen Senate Office Building. Witness: Commissioner, Koskinen is scheduled to testify.

### **Social Media**

YouTube video embedded on IRS.gov this week:

- IRS2Go 5.2
- Is your Social Security Income taxable?

IRS.gov front page - Rotating Spotlight

- Emergency Planning
- Back to School
- Get the Facts - transcript incident
- Identity Theft
- Health Care and Taxes

IRS.gov front page – News

- October 15 deadline (pending – to link National news release)
- National Preparedness Month: Are You Ready for Emergencies?
- Follow IRS on Tumblr
- Guard Against New Tricks by Scam Artists
- Tax Benefits and Services for Disabled Taxpayers

Twitter

- HealthCare Tax Tip #57: The Health Care Law and You: Nine Facts about Letters Sent by the IRS <http://go.usa.gov/3eANC>
- HealthCare Tax Tip #56 Questions and Answers to Help Your Organization Understand ACA Reporting Requirements <http://go.usa.gov/3em7A>
- Try IRS.gov before you call - tax tools <http://irs.gov/uac/Tools>
- October 15 deadline
- Telephone Scams - 1.) <http://go.usa.gov/3sKCK> 2.) <http://go.usa.gov/3vjPY> 3.) <http://go.usa.gov/3rwmn>
- Get Transcripts by mail <http://go.usa.gov/3AKcF>
- ACA estimator tools bring healthcare tax credits, payments into focus <http://go.usa.gov/3f24g>
- Direct Deposit
- Daily YouTube video tweets
- Daily ACA tweets

Tumblr posts scheduled for this week:

Monday 9/21:

- Phone Scams
- Get transcript by mail

Tuesday 9/22: Tax Help for disabilities

- HCTT #54 - Moving this Year? If You Receive the Premium Tax Credit, Report this Life Event.

Wednesday 9/23: VITA TCE

- SSA/IRS Reporter

Thursday 9/24: October 15 deadline

- Get Transcript by Mail
- October 15 deadline (Direct Pay)

Friday 9/25: Health Care Estimator

- Beware of fake charities

October 15 deadline (basic reminder)

### **Visual Education and Communications**

Live/Taped Broadcasts:

- CSRS Retirement Seminar - Live (09/23-09/24)

Streaming Assisted Events:

- IRS Commissioner Virtual Town Hall (1111) - Polycom/Stream (09/21)

YouTube Postings

- English:
  - N/A
- Spanish:
  - N/A
- ASL:
  - N/A

Centra Captions:

- Professionalism, Business Etiquette & Personal Accountability (09/22)
- Time Management: Avoiding time Stealers (09/22)
- Interpersonal Communication: Communicating with Confidence (09/23)
- IRS U Webinar: Effective Presentations (09/23)
- RAC Call - Refresher Framing the Issue (09/24)
- Whistleblower Subject Matter Expert Training (09/24)
- Coverage, Nondiscrimination and 401(a)(26) (09/24)

Other Projects:

- B&L/Rehearsal- CSRS/FERS Retirement Seminars (09/22)
- SBSE Home Office Deductions Avid Edit (09/22)

Service-Wide Video Editorial Board (SVEB):

Seven video requests were approved by SVEB and the Deputy Commissioner. They are:

- Request #366 – IT AD Town hall meeting – November 5, 2015
- YouTube Request #80 – Free Help Preparing Your Return
- YouTube Request #81 – VITA Recruitment
- YouTube Request #82 – Do-It-Yourself Free Tax Preparation
- YouTube Request #83 – YouTube Video: Claiming HCTC on Your 2015 Tax Return
- YouTube Request #84 – Free Help for Taxpayers
- Request #365 –UNS Town Hall “Positioning Ourselves for Success”

## **Communications and Liaison – Weekly Activity Report Week of September 28, 2015**

### **Internal Communications**

#### Commissioner News

- Commissioner holds virtual town hall meetings with Ohio employees and managers (9/24) (Comm)

#### IRS Headlines

- Know what to do if your direct deposit is late (AWSS)
- Forty years of privacy: times have changed, but charge remains same (PGLD)
- The rules for Quality Step Increases are changing in FY2016 (HCO)

#### Leaders' Alert

- Only mark the "Final T&A" and "End Day" SETR fields when an employee separates (AWSS)
- You must approve your employees' Public Transportation Subsidy Program recertifications (AWSS)
- New contractor FISMA Security Training Management Solution coming this November (AWSS)

#### Poll Question

- One of the most popular workshops on the IRS video portal, Your Guide to an IRS Audit, averages about how many views per month? (SBSE)

#### Spotlight

- Testing the waters (W&I employee shadows revenue officer) (Multiple)

#### Daily News

- Making IRS.gov less taxing (DCSE)
- Learn tips to reduce your vulnerability to identity theft (HCO)
- Use Duluth Travel Inc. to book non-Concur reimbursed reservations (AWSS)

### **National Media Relations**

#### **National Public Liaison**

Security Summit – Tax Pro Subgroup leadership will meet to discuss structure and planning for subgroup on Monday, September 28<sup>th</sup>. Discussion lead by Carol Campbell & Candice Cromling (IRS); and (b) (6) (Thomson Reuters) & (b) (6) (Wolters Kluwer/CCH).

Security Summit – Strategic Threat Assessment & Response (STAR) Subgroup leadership will meet to continue work on planning for meeting of entire group with NIST



representative to discuss State and Industry compliance with a NIST standard. Discussion lead by Sharon James, Mireille Khoury, & Candice Cromling (IRS); Raja Sambandam (State of New Mexico); and, (b) (6) (Intuit), (b) (6) (b) (6) (HRBlock).

The Security Summit Information Sharing and Authentication Working Group Meetings will take place Sept. 29 and 30 in G-038 from 9am-4pm.

## **Legislative Affairs**

Upcoming Meetings:

Currently, there are no meetings scheduled.

Upcoming Hearings:

Currently, there are no hearings scheduled.

## **Social Media**

YouTube video embedded on IRS.gov this week:

- October 15 deadline

IRS.gov front page - Rotating Spotlight

- Emergency Planning
- Back to School
- Get the Facts - transcript incident
- Identity Theft
- Health Care and Taxes

IRS.gov front page – News

- October 15 deadline
- National Preparedness Month: Are You Ready for Emergencies?
- Follow IRS on Tumblr
- Guard Against New Tricks by Scam Artists
- Tax Benefits and Services for Disabled Taxpayers

Twitter

- HealthCare Tax Tip #59: How Coverage You Offer (or Don't Offer) May Mean an Employer Shared Responsibility Payment for Your Organization  
<http://go.usa.gov/3tGfw>
- HealthCare Tax Tip #58: The Importance of Workforce Size Under the Employer Shared Responsibility Provisions <http://go.usa.gov/3tP84>
- October 15 deadline
- Telephone Scams - 1.) <http://go.usa.gov/3sKCk> 2.) <http://go.usa.gov/3vjPY> 3.) <http://go.usa.gov/3rwmn>
- Get Transcripts by mail <http://go.usa.gov/3AKcF>
- Try IRS.gov before you call - tax tools <http://irs.gov/uac/Tools>
- ACA estimator tools bring healthcare tax credits, payments into focus  
<http://go.usa.gov/3f24g>
- Direct Deposit
- Daily YouTube video tweets
- Daily ACA tweets

Tumblr posts scheduled for this week:

Monday 9/28:

- HCTT #55
- IRS2Go 5.2 (video)
- Payment Options

Tuesday 9/29:

- HCTT #56
- Disaster Preparedness

Wednesday 9/30:

- HCTT #57
- VITA/TCE Volunteers
- Estimated Tax Payments

Thursday 10/1:

- October 15 Deadline
- Direct Deposit

Friday 10/2:

- Mail in Transcript
- Simplified Home Office Deduction
- Charitable Donations

### **Visual Education and Communications**

Live/Taped Broadcasts:

- Estate & Gift Tax FY2015 CPE Day 2 of 2 – Rebroadcast Stream (09/30-10/01)

Streaming Assisted Events:

- IRS Commissioner Virtual Town Hall (1111) - Polycom/Stream (09/28)

YouTube Postings

- English:
  - N/A
- Spanish:
  - N/A
- ASL:
  - N/A

Centra Captions:

- N/A

Other Projects:

- SBSE Home Office Deductions Avid Edit (09/29)
- ACA Training Update Taping (09/29-09/30)
- Hatch Act with Dan Riordan – 1111 Taping (10/02)

Service-Wide Video Editorial Board (SVEB):

- N/A



# **Communications and Liaison – Weekly Activity Report**

## **Week of October 05, 2015**

### **Internal Communications**

#### Commissioner News

- Commissioner holds virtual town hall meeting with employees, managers in San Francisco area
- Deputy commissioners visit Pennsylvania employees for town hall and meetings
- Deputy commissioners visit New Jersey field office employees

#### Employee email

- Updates from my visits and letters

#### IRS Headlines

- Post Taxpayer Bill of Rights poster in personal work area (C&L)
- Visit the Federal Insurance Benefits website for open season information (HCO)
- Your area records management specialist may have changed (PGLD)

#### Leaders' Alert

- Reminder: IRS provides support for nursing mothers (HCO)
- Separating Employee Clearance conference calls scheduled for October and December (AWSS)
- IRS-sponsored event generates helpful engagement ideas for managers (HCO)
- What's changed and what hasn't with Quality Step Increase procedures (HCO)
- Attend webinar on emotional intelligence — a key skill used by successful managers (HCO)

#### Daily News (webbies)

- Learn more about understanding and accommodating employees with learning disabilities 10/28 (EDI)

#### Poll questions

- Which of these incidents should you report to the IRS Situational Awareness Management Center? (AWSS)
- How many employees with disabilities work for the IRS? (W&I)

#### Spotlight

- Breaking the sound barrier (National Disability Employment Awareness Month) (Multiple)
- Family matters (National Work and Family Month)

### **National Media Relations**

#### Press Materials For Release

- Security Summit
- IRS Announces 2016 Pension Plan Limitations
- Inflation Adjustments
- Tax Preparedness Series: Employees Should Take Time to Check Withholding

*News release possible for coming weeks:*

- Tax Preparedness Series
- Retirement-plan-related required minimum distribution (RMD) reminder
- Phone Scams Reminder

## **National Public Liaison**

Professional Stakeholder Relationship Branch

Tues. Oct. 20, Weds. Oct. 21 – Security Summit meetings and press conference. Commissioner Koskinen and representatives of the states and software industry will participate. IRS Headquarters.

Weds. Oct. 28, 9 am-Noon – Information Reporting Program Advisory Committee presents annual report to Commissioner Koskinen and IRS executives. Residence Inn, Vermont Ave.

Business Stakeholder Relationship Branch

Thur. Oct. 22, 9 am-Noon – NPL Liaison Meeting. IRS Headquarters.

## **Legislative Affairs**

Upcoming Meetings:

Currently, there are no meetings scheduled.

Upcoming Hearings:

On Tuesday, October 27, 2015, a hearing is scheduled to be held before the Senate Finance Committee on Section 501(c)(4). The hearing is scheduled for 10:00 am in room 215 of the Dirksen Senate Office Building.

Witness: Commissioner, Koskinen is scheduled to testify.

## **Social Media**

Social Media Weekly Activity Report  
Week of October 19, 2015

YouTube video embedded on IRS.gov this week:

- Products for Visually Impaired Taxpayers (ASL) – note: October is Disability Month
- Security Summit Video (if approved)

IRS.gov front page - Rotating Spotlight

- Free Tax Help

- Emergency Planning (SC disaster relief, recent disaster declarations, deducting losses of a disaster)
- Get the Facts - transcript incident
- Identity Theft
- Health Care and Taxes (ALEs, PTC)
- Security Summit (pending)

#### IRS.gov front page – News

- [IRS Urges: Take Advantage of Voluntary Disclosure Programs](#)
- [Beware of Possible South Carolina Flood Scams](#)
- [Business E-Filing Grows](#)
- [Proposed Tax Guidelines for ABLE Accounts](#)

#### Twitter

- Security Summit
- HealthCare Tax Tip #65: One Simple Graphic Helps Determine if You're Eligible for the Premium Tax Credit <http://go.usa.gov/3SxkV>
- HealthCare Tax Tip #64: Mark Your Calendar Now: 2016 Reporting Deadlines for Employers and Health Coverage Providers <http://go.usa.gov/3JPzm>
- Registration now open for the International Conference on Taxpayer Rights, November 18-19 in DC: [go.usa.gov/3zjXH](http://go.usa.gov/3zjXH)
- Telephone Scams - 1.) <http://go.usa.gov/3sKCk> 2.) <http://go.usa.gov/3vjPY> 3.) <http://go.usa.gov/3rwmn>
- Get Transcripts by mail <http://go.usa.gov/3AKcF>
- Collection Early Interaction Initiative <http://go.usa.gov/3u5Mh>
- Try IRS.gov before you call - tax tools <http://irs.gov/uac/Tools>
- ACA estimator tools bring healthcare tax credits, payments into focus <http://go.usa.gov/3f24g>
- Direct Deposit
- Daily YouTube video tweets
- Daily ACA tweets

#### Tumblr posts scheduled for this week:

##### Monday 10/19:

- Tax Help for Disabled Tax Payers
- Disaster Scam
- HCTT #60

##### Tuesday 10/20:

- Data Theft Webinar
- Get Transcript my Mail

##### Wednesday 10/21:

- Simplified Home Office Deduction
- VITA/TCE Volunteers
- HCTT #61

##### Thursday 10/22:

- International Conference
- Tax Products for Visually Impaired (video)

##### Friday 10/23:

- Where's my refund? (video)
- FATCA
- HCTT #62

## **Visual Education and Communications**

Live/Taped Broadcasts:

- N/A

Streaming Assisted Events:

- N/A

YouTube Postings

- English:
  - N/A
- Spanish:
  - N/A
- ASL:
  - N/A

Centra Captions:

- Workplace Relationships (10/08)
- IT - How to Receive Criticism-Make It Work For You (10/08)

Other Projects:

- N/A

Service-Wide Video Editorial Board (SVEB)

One video request this week is pending Deputy Commissioner approval. It is:  
VR#367 - IRS Commissioner Award Ceremony

# **Communications and Liaison – Weekly Activity Report**

## **Week of October 19, 2015**

### **Internal Communications**

#### Commissioner News

- Commissioner holds virtual town hall meeting with employees, managers in San Francisco area
- Deputy commissioners visit Pennsylvania employees for town hall and meetings
- Deputy commissioners visit New Jersey field office employees

#### Employee email

- Updates from my visits and letters

#### IRS Headlines

- Post Taxpayer Bill of Rights poster in personal work area (C&L)
- Visit the Federal Insurance Benefits website for open season information (HCO)
- Your area records management specialist may have changed (PGLD)

#### Leaders' Alert

- Reminder: IRS provides support for nursing mothers (HCO)
- Separating Employee Clearance conference calls scheduled for October and December (AWSS)
- IRS-sponsored event generates helpful engagement ideas for managers (HCO)
- What's changed and what hasn't with Quality Step Increase procedures (HCO)
- Attend webinar on emotional intelligence — a key skill used by successful managers (HCO)

#### Daily News (webbies)

- Learn more about understanding and accommodating employees with learning disabilities 10/28 (EDI)

#### Poll questions

- Which of these incidents should you report to the IRS Situational Awareness Management Center? (AWSS)
- How many employees with disabilities work for the IRS? (W&I)

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- Breaking the sound barrier (National Disability Employment Awareness Month) (Multiple)
- Family matters (National Work and Family Month)

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#### Press Materials For Release

- Security Summit



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- Inflation Adjustments
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*News release possible for coming weeks:*

- Tax Preparedness Series
- Retirement-plan-related required minimum distribution (RMD) reminder
- Phone Scams Reminder

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Thur. Oct. 22, 9 am-Noon – NPL Liaison Meeting. IRS Headquarters.

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Upcoming Hearings:

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Week of October 19, 2015

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- Security Summit Video (if approved)

IRS.gov front page - Rotating Spotlight

- Free Tax Help
- Emergency Planning (SC disaster relief, recent disaster declarations, deducting losses of a disaster)
- Get the Facts - transcript incident

- Identity Theft
- Health Care and Taxes (ALEs, PTC)
- Security Summit (pending)

#### IRS.gov front page – News

- [IRS Urges: Take Advantage of Voluntary Disclosure Programs](#)
- [Beware of Possible South Carolina Flood Scams](#)
- [Business E-Filing Grows](#)
- [Proposed Tax Guidelines for ABLE Accounts](#)

#### Twitter

- Security Summit
- HealthCare Tax Tip #65: One Simple Graphic Helps Determine if You're Eligible for the Premium Tax Credit <http://go.usa.gov/3SxkV>
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- Registration now open for the International Conference on Taxpayer Rights, November 18-19 in DC: [go.usa.gov/3zjXH](http://go.usa.gov/3zjXH)
- Telephone Scams - 1.) <http://go.usa.gov/3sKCk> 2.) <http://go.usa.gov/3vjPY> 3.) <http://go.usa.gov/3rwmn>
- Get Transcripts by mail <http://go.usa.gov/3AKcF>
- Collection Early Interaction Initiative <http://go.usa.gov/3u5Mh>
- Try IRS.gov before you call - tax tools <http://irs.gov/uac/Tools>
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##### Monday 10/19:

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- Disaster Scam
- HCTT #60

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- Get Transcript my Mail

##### Wednesday 10/21:

- Simplified Home Office Deduction
- VITA/TCE Volunteers
- HCTT #61

##### Thursday 10/22:

- International Conference
- Tax Products for Visually Impaired (video)

##### Friday 10/23:

- Where's my refund? (video)
- FATCA
- HCTT #62

## **Visual Education and Communications**

### Live/Taped Broadcasts:

- N/A

### Streaming Assisted Events:

- N/A

### YouTube Postings

- English:
  - VITA
  - Filing status
  - Audits by mail letter 566
  - Understanding your audit letter form 4549
  - Audits by mail-What to do?
  - Simplified Home Office Deduction for Schedule C
  - Simplified Home Office Deduction for Daycare Providers
  - Simplified Home Office Deduction for Schedule F, Employee, Partnership Filers
- Spanish:
  - N/A
- ASL:
  - N/A

### Saba (Centra) Captions:

- IT: Leadership Behavior Session: Work Smarter (10/20)
- EDI: RAC Call (10/20)
- TEGE: Payment Processing Procedures (10/21)
- HCO: Octoberfest Chat (10/21)
- EDI: Reasonable Accommodations for Managers (10/21)
- TEGE: Auditing for Back-Up Withholding Tax (10/22)
- TEGE: Audit Hour Q&A (10/22)
- HCO: Fourth Quarter Virtual Award Recognition Ceremony (10/22)

### Other Projects:

- Taping – Deputy Commissioner Jeffrey Tribiano replacing Peggy Sherry in the IRS, HCO New Hire Orientation Video - 1111 (10/19)
- Taping – Commissioner Koskinen, State Taxation Authority, Two Software Industry Representatives for Taxpayer Security Awareness Summit – 1111 (10/20)
- Taping – ASL YouTube Tax Tips (10/22)
- Audio Recording – ASL YouTube Voice Over Recording (10/23)
- Taping – NTEU President Tony Riordan replacing Colleen Kelly in the IRS, HCO New Hire Orientation Video - 1111 (10/23)

### Service-Wide Video Editorial Board (SVEB)

#### Two video requests are pending Deputy Commissioner Approval:

- Request #372 – Appeals All Employee Nov. 10<sup>th</sup> Town hall
- Request #373 SPEC Grant Program Office VITA Recipient Orientation Webinterpoint session

# **Communications and Liaison – Weekly Activity Report**

## **Week of November 9, 2015**

### **Internal Communications**

#### IRS Headlines

- Find out what you need to know about the Affordable Care Act (ACA)
- Act now: Federal benefits open season closes Dec. 14 (HCO)
- Schedule your use-or-lose annual leave (AWSS)

#### Leaders' Alert

- Complete Leadership Succession Review Stage 4 by Jan. 31 (HCO)

#### Other News

- Hatch Act – do's and don't's for employees (HCO)
- 'One IRS' Design Standards and Guidelines promote consistent appearance (W&I)

#### Poll Question

- What style guide do you use to make sure your business writing is consistent and follows your organization's standards? (C&L)
- Which public law formally established the Chief Financial Officer in the federal government? (CFO)

#### Spotlight

- A legacy of service (Veterans Day) (Comm)

#### Daily News

- Increased telework may decrease the amount you need from the Public Transportation Subsidy Program (AWSS)
- Attend Concur travel workshops beginning 11/17 (AWSS)
- IRS will pay 2015 performance awards to bargaining unit employees (HCO)

### **National Media Relations**

#### Press Materials For Release

- Tax Preparedness Series: Choosing a Tax Preparer
- FSA limit for 2016: reminder about signing up and renewing, grace period rules
- PTIN Reminder

#### *News release possible for coming weeks:*

- Tax Preparedness Series
- Plan Ahead
- Security Summit—*Taxes.Security.Toghether*
-

## **National Public Liaison**

Wednesday Nov. 18, 9 am – The Internal Revenue Service Advisory Council (IRSAC) will conduct its Public Meeting. The Public Meeting will take place in the Virginia Room at the Marriot Wardman Park Hotel, 2660 Woodley Rd, NW, Washington, DC 20008.

The IRSAC will present its public report to the Commissioner and other IRS leadership and make recommendations. Departing committee members will be recognized for their service to the government. Notice of this meeting appeared in the Federal Register on November 2, 2015.

## **Legislative Affairs**

Not IRS Agency Records



Upcoming Hearings:

Currently, there are no hearings scheduled.

## **Social Media**

YouTube video embedded on IRS.gov this week:

- IRS audits of Earned Income Tax Credit by mail explained  
<https://youtu.be/iUIErpEv1rE>
- Line-by-line explanation of Form 4549, Income Tax Examination Changes  
<https://youtu.be/kB2XGkBi36M>

IRS.gov front page - Rotating Spotlight

- Health Care and Taxes (ALEs, PTC)
- Security Summit
- Free Tax Help
- (To be replaced by tax preparedness) Emergency Planning
- Get the Facts - transcript incident
- Tax Preparedness - Selecting a Tax Preparer, Take Required Retirement Plan Distributions by Dec. 31, Take Time to Check Withholding

IRS.gov front page – News

- [Phone Scams](#)
- [Dec. 31 Deadline for Pension Plan Distributions](#)
- [IRS Announces 2016 Pension Plan Limits](#)
- [Take Advantage of Voluntary Disclosure Programs](#)

Twitter

- HealthCare Tax Tip #: ACA and Employers – HCTT #71, Pub Helps Health Coverage Providers & Employers Understand ACA Info Return E-Filing  
<http://go.usa.gov/cC5zW>
- HealthCare Tax Tip #: ACA and Employers - HCTT #72: Understanding Form 1095-C, Employer-Provided Health Insurance Offer and Coverage.  
<http://go.usa.gov/cr3s9>

- November 18 SB/SE Webinar: Overview of #SCorporation Shareholder Stock Basis. <https://go.usa.gov/cChMQ>
- #IRS #audits of Earned Income Tax Credit by mail explained <https://youtu.be/iUIErpEv1rE> #IRSYouTube #EITC
- Get a line-by-line explanation of Form 4549, Income Tax Examination Changes <https://youtu.be/kB2XGkBi36M>
- Registration now open for the International Conference on Taxpayer Rights, November 18-19 in DC: [go.usa.gov/3zjXH](http://go.usa.gov/3zjXH)
- Telephone Scams - 1.) <http://go.usa.gov/3sKCK> 2.) <http://go.usa.gov/3vjPY> 3.) <http://go.usa.gov/3rwmn>
- Get Transcripts by mail <http://go.usa.gov/3AKcF>
- Try IRS.gov before you call - tax tools <http://irs.gov/uac/Tools>
- Direct Deposit
- Online Payment Agreements
- Daily YouTube video tweets
- Daily ACA tweets

Tumblr posts scheduled for this week:

11/9:

- Audits by Mail (video)
- S Corporation Webinar
- HCTT #63

11/10:

- Responding to Audit Letter Notice (video)
- Online Tax Forums
- HCTT #64

11/12:

- S Corporation Webinar
- HCTT #65
- International Conference Taxpayer Rights

11/13:

Breaking Down Your Audit Response (video)  
S Corporation Webinar  
HCTT #66  
Taxpayer Preparedness Series

### **Visual Education and Communications**

Live/Taped Broadcasts:

- Appeals Virtual Town Hall (11/10)

Streaming Assisted Events:

- HCO: Accelerating Data Driven Innovation While Managing Risk (Stream/Saba) (11/10)

YouTube Postings

- English:

- N/A
- Spanish:
  - N/A
- ASL:
  - Breaking Down Your IRS Response to Audits by Mail Letter 566
  - Audits by Mail – What to Do?
  - Responding to Audit Letter Notice CP75: Earned Income Tax Credit (EITC)

Saba (Centra) Captions:

- N/A

Other Projects:

- ASL – ACA Commissioner Re-Edit – Avid Edit (11/10)
- Spanish YouTube Tax Tips – FCP Edit (11/09-11/10, 11/12)
- ASL YouTube Tax Tips Taping (11/12)
- ASL YouTube Tax Tips Audio Recording (11/13)

Service-Wide Video Editorial Board (SVEB)

Three Video Requests were reviewed by the SVEB this week. Only one was approved to move forward for DCOS review and approval:

YouTube Video Request #86 – Year-End Tax Tips

## **Communications and Liaison – Weekly Activity Report**

### **Week of November 16, 2015**

#### **Internal Communications**

##### IRS Headlines

- Winter is coming: Know what to do if your office is closed or opens late (AWSS)
- You can now view Enterprise Service Desk wait times before you call (IT)

##### Other News

- Federal Employee Education & Assistance Fund announces scholarship winners

##### Daily News (webbies)

- Salary debts not repaid by 12/31 will be taxed (AWSS)

##### Poll questions

- When did the IRS first begin testing the Integrated Data Retrieval System (IDRS)? (RAS)
- What style guide do you use to make sure your business writing is consistent and follows your organization's standards? (C&L)

##### Spotlight

- Defying diabetes (National Diabetes Month) (C&L)

#### **National Media Relations**

##### Potential news releases for this week:

- IRS Seeks Information on Professional Employer Organization Industry Practices
- The Internal Revenue Service Advisory Council (IRSAC) Releases 2015 Annual Report
- Security Summit Public Awareness Campaign Kick-off: Taxes. Security. Together.

##### Potential news releases possible for coming weeks:

- Plan Ahead If You Need a Transcript

#### **National Public Liaison**

##### Professional Stakeholder Relationship Management Branch:

Wednesday Nov. 18, 3 p.m. – National Society of Accountants President Kathy Hettick and Executive Vice President John Ams meet with Commissioner Koskinen. Room 3000.

Thursday Nov. 19, 9 a.m. – Noon – NPL monthly Practitioner Meeting. Agenda includes updates on ACA, W-2 verification code project, filing season, PTIN renewal and year-end legislation. Room 2140.

Thursday Nov. 19, 10:45 a.m. – Commissioner Koskinen meets with Federation of Tax Administrators Board of Trustees. Press conference follows at 11:30 a.m. Hall of the States, 444 N. Capitol St.

##### Liaison and Tax Forum Branch



Wednesday Nov. 18, 9 a.m. – The Internal Revenue Service Advisory Council (IRSAC) will conduct its Public Meeting. The Public Meeting will take place in the Virginia Room at the Marriot Wardman Park Hotel, 2660 Woodley Rd, NW, Washington, DC 20008.

The IRSAC will present its public report to the Commissioner and other IRS leadership and make recommendations. Departing committee members will be recognized for their service to the government. Notice of this meeting appeared in the Federal Register on November 2, 2015.

#### Business Stakeholder Relationship Management Branch

Tuesday Nov. 17 - National Small Business Forum from 10 – 11:30 a.m. – ACA and SB/SE Collections will meet with industry partners to discuss Affordable Care Act update and FTD Alerts, respectively.

Wednesday Nov. 18 & Thursday Nov. 19 – Reporting Agent Forum – Agenda includes updates on the Security Summit, ACA, penalties, 94x e-File, Certified PEO Program, Early Interaction Program, EFTPS, W-2 Verification Code Pilot, SSA's Annual Wage Reporting Redesign, identity theft refund fraud, and more.

### **Legislative Affairs**

Not IRS Agency Records



Upcoming Hearings:

Currently, there are no hearings scheduled.

### **Social Media**

1.) YouTube video embedded/featured on IRS.gov this week:

- VITA Volunteer Recruitment
- Security Summit video (possible for Thursday)

2.) IRS.gov front page - Rotating Spotlight

- Health Care and Taxes (ALEs, PTC)
- \*Security Summit
- Free Tax Help
- \*Emergency Planning

- Get the Facts - transcript incident

\* Tax Preparedness - Selecting a Tax Preparer, Take Required Retirement Plan Distributions by Dec. 31, Take Time to Check Withholding

\* Taxes, Security, Together – To Replace old Security Summit Spotlight on Thursday

### 3.) IRS.gov front page – News

- Consumer Alert: Beware of Phone Scams
- Dec. 31 Deadline for Pension Plan Distributions
- IRS Announces 2016 Pension Plan Limits
- Take Advantage of Voluntary Disclosure Programs

\* Health Flexible Spending Arrangements in 2016

\* 2016 PTIN Renewal Period

### 4.) Potential news releases for this week to be featured on front page:

- IRS Seeks Information on Professional Employer Organization Industry Practices
- The Internal Revenue Service Advisory Council (IRSAC) Releases 2015 Annual Report
- Security Summit Public Awareness Campaign Kick-off: Taxes. Security. Together.

### 5.) Twitter

- HealthCare Tax Tip #: ACA and Employers – HCTT #74: Providers/Employers: Understanding EFile <http://go.usa.gov/cgzAG>
- HealthCare Tax Tip #: ACA and Employers - HCTT #73: Three Tax Considerations during Marketplace Open Enrollment <http://go.usa.gov/cYeKQ>
- November 18 SB/SE Webinar: Overview of #SCorporation Shareholder Stock Basis. <https://go.usa.gov/cChMQ>
- #IRS #audits of Earned Income Tax Credit by mail explained <https://youtu.be/iUIErpEv1rE> #IRSYouTube
- Get a line-by-line explanation of Form 4549, Income Tax Examination Changes <https://youtu.be/kB2XGkBi36M>
- Telephone Scams - 1.) <http://go.usa.gov/3sKCK> 2.) <http://go.usa.gov/3vjPY> 3.) <http://go.usa.gov/3rwmn>
- Get Transcripts by mail <http://go.usa.gov/3AKcF>
- Try IRS.gov before you call - tax tools <http://irs.gov/uac/Tools>
- Direct Deposit
- Online Payment Agreements
- Daily YouTube video tweets
- Daily ACA tweets

### 6.) Tumblr posts scheduled for this week:

11/16:

- HCTT #63
- S Corporation Webinar
- 944/941 Forms

11/17:

- HCTT #64
- Online Tax Forums
- VITA/TCE Recruitment (video)

11/18:

- HCTT #65
- FATCA Registration
- Filing Status (video)

11/19:

- HCTT #66
- IRS Commissioner: Individual Shared Responsibility (video)

11/20:

- Protect Yourself from Identity Theft
- At first you think it's real... scam
- Security Summit Logo (link to PR)

### **Visual Education and Communications**

Live/Taped Broadcasts:

- N/A

Streaming Assisted Events:

- N/A

YouTube Postings

- English:
  - N/A
- Spanish:
  - N/A
- ASL:
  - ASL: Gift Tax
  - ASL: Commissioner: Individual Shared Responsibility Provision

Saba (Centra) Captions:

- TEGE - Audit Hour - Scope of Examination (11/18)
- IT - Managing Your Emotions in the Workplace (11/19)

Other Projects:

- ASL: Filing Status Avid Edit (11/16-11/18)
- ASL: Volunteer Income Tax Assistance Recruitment Avid Edit (11/16-11/18)
- ASL: Do-It-Yourself Free Tax Preparation Avid Edit (11/16-11/18)

Service-Wide Video Editorial Board (SVEB)

Four Video Requests were reviewed by the SVEB this week and are now pending DCOS approval. They are:

- YTVR#87 Choose a Tax Preparer Wisely
- Request #380 – Appeals ICLE presentation

- Request #381 W&I VITA Training: TaxWise Software  
Request #382 TAS - International Taxpayer Rights Conference video

## **Communications and Liaison – Weekly Activity Report**

### **Week of November 23, 2015**

#### **Internal Communications**

##### IRS Headlines

- IRS delivers record-breaking 2015 Feds Feed Families campaign (AWSS)
- Reminder: Maintain your Public Transportation Subsidy Program benefits (AWSS)
- New paperless option for the W-2 and 1095-C is available on the Employee Personal Page (AWSS)

##### Leaders' Alert

- You can now digitally sign Form 6774 (HCO)
- Commissioner grants time off for holiday events in December (HCO)
- ELMS pre-retirement seminar course modules replace live sessions (HCO)
- Attend two-part webinar Dec. 2 and 3 about using ELMS to develop people (HCO)
- Don't forget to schedule sign language interpreters for meetings, holidays and retirement events (EDI)

##### Other News

- Commissioner, states and tax industry: We need taxpayers' help in battling identity theft (C&L)

##### Poll question

- Are you making a donation through the CFC this year? (AWSS)

##### Spotlight

- It could all be so simple (Simplify your life) (HCO)

##### Key Agency Projects

- IT Cybersecurity releases IRS FY2016 Security Program Plan (IT)

##### Daily News (webbies)

- Simplify your life (Appeals)
- Stay safe this winter (AWSS)
- Review your Statement of Earnings and Leave (AWSS)
- Report workplace injuries and accidents immediately (AWSS)

#### **National Media Relations**

##### Potential news releases for this week:

- IRS Upgrades, Enhances FATCA Registration System
- [Security](#) Tax Tips Announcement
- Tips from IRS for Year-End Gifts to Charity

##### Potential news releases possible for coming weeks:

- Plan Ahead If You Need a Transcript
- De Minimis Amount Notice Announcement
- New Early Interaction Initiative Aims to Help Employers Stay Current on Their Payroll Taxes

## **National Public Liaison**

### **Legislative Affairs**

Upcoming Meetings:

Currently, there are no meetings scheduled.

Upcoming Hearings:

Currently, there are no hearings scheduled.

### **Social Media**

1.) YouTube video embedded/featured on IRS.gov this week:

- Taxes. Security. Together.” <http://youtu.be/aMH8TBeA4IE>
- “Tax Scams.” <https://youtu.be/0y5z0kWgBcM>

2.) IRS.gov front page - Rotating Spotlight

- Protect Your ID (Security Summit)
- Taxpayer Rights
- Health Care and Taxes (Open Enrollment, ALEs)
- Preparing (Series on preparing for the filing season)
- Get the Facts - transcript incident

3.) IRS.gov front page – News

- [Plan for 2016 Health Flexible Spending Arrangements](#)
- [Tax Preparers Must Renew PTINs for 2016](#)
- [Consumer Alert: Beware of Phone Scams](#)
- [Take Advantage of Voluntary Disclosure Programs](#)

\* [ID Theft Tax Tip Series \(to be added this week\) – replace Take Advantage of Voluntary Disclosure Programs](#)

4.) Potential news releases for this week to be featured on front page:

- IRS Upgrades, Enhances FATCA Registration System
- [Security](#) Tax Tips Announcement
- Tips from IRS for Year-End Gifts to Charity

5.) Twitter

- HealthCare Tax Tip #: ACA and Employers – HCTT #76: Four Things to Know about Advance Payments of the Premium Tax Credit  
<http://go.usa.gov/cTpJB>
- HealthCare Tax Tip #: ACA and Employers - HCTT #75: Resources to Help Insurance Providers & Employers Understand ACA Requirements  
<http://go.usa.gov/c2BRw>
- “Taxes. Security. Together.” <http://youtu.be/aMH8TBeA4IE>
- “Tax Scams.” <https://youtu.be/0y5z0kWgBcM>
- Telephone Scams - 1.) <http://go.usa.gov/3sKCK> 2.) <http://go.usa.gov/3vjPY> 3.) <http://go.usa.gov/3rwmn>
- Get Transcripts by mail <http://go.usa.gov/3AKcF>
- Try IRS.gov before you call - tax tools <http://irs.gov/uac/Tools>

- Direct Deposit
- Online Payment Agreements
- Daily YouTube video tweets
- Daily ACA tweets

6.) Tumblr posts scheduled for this week:

Monday 11/23:

- Electronic payments
- FATCA Registration

Tuesday 11/24:

- Beware fake charities
- VITA/TCE Volunteer

Wednesday 11/25:

- Taxes. Security. Together (video)
- FATCA Registration

Friday 11/27:

- Filing Status (video)
- ACA Change in Circumstances

### **Visual Education and Communications**

Live/Taped Broadcasts:

- N/A

Streaming Assisted Events:

- N/A

YouTube Postings

- English:
  - Commissioner's Security Summit: Helping Taxpayers (Various Videos)
  - Gift Tax
  - VITA
  - First Time Home Buyer
  - Year End Tax Tips
- Spanish:
  - Responding to Audit Letter
  - Understand Audit Letter
  - Breaking Down Your IRS Response to Audits by Mail Letter
  - Filing Status
  - Volunteer Income Tax Assistance Recruitment
  - Get Tax Help In Spanish
  - Second Innovation Seminar
  - Gift Tax
- ASL:
  - Filing Status
  - Volunteer Income Tax Assistance Recruitment

Saba (Centra) Captions:

- PDB: Social Media and the Hatch Act (11/24)

Other Projects:

- Studio Maintenance Day (11/23)
- Commissioner's Security Summit Video Avid Edit (11/24-11/25, 11/27)
- IRS Tax Calendar YouTube Avid Edit (11/24-11/25)
- Editing English YouTube Videos (various) (11/24-11/25)

Service-Wide Video Editorial Board (SVEB)

Six Video Requests are being reviewed by the SVEB this week. They are:

- YouTube Video Request #89 - Taxes Security Together
- YouTube Request #88 - Payroll Tax and the Trust Fund Recovery Program
- Request #375 - Appeals Ad-Hoc Business Objects Environment (BOE) Job Aides (total of 15)
- Request #382 - State of TAS FY16 webcast
- Request #383 - IT UNS Town Hall November 30, 2015

Request #385 - TEGE StayExempt.irs.gov Training Course: Form 990 Overview Course



## **Communications and Liaison – Weekly Activity Report**

### **Week of November 30, 2015**

#### **Internal Communications**

##### IRS Headlines

- ELMS pre-retirement seminar course modules replace live sessions (HCO)
- Volunteer to prepare taxes for those in need (W&I)
- Know how to report potentially dangerous situations (PGLD)
- Join the Leave Bank 12/1-1/22 (HCO)

##### Leaders' Alert

- Update to the anti-harassment policy (EDI)

##### Daily News (webbies)

- IT begins enterprise-wide Internet Explorer 11 distribution 12/29 (IT)
- Commissioner: Your ideas influence change (Comm)
- Human Resources Reporting Center unavailable 12/9-21 (AWSS)
- USAJobs experiencing compatibility issues with resume editor (HCO)

##### Poll questions

- Publication 1, Your Rights as a Taxpayer, was updated in 2014 to include: (C&L)

##### Spotlight

- Saying hello or goodbye (Multiple)
- Volunteerism (W&I)
- Ones to watch (Multiple)

##### Other News

- Election campaigns and the Hatch Act - do's and don'ts for employees (HCO)

#### **National Media Relations**

##### Potential news releases for this week:

- CI Annual Report
- Plan Ahead If You Need a Transcript
- New Early Interaction Initiative Aims to Help Employers Stay Current on Their Payroll Taxes

##### Potential news releases possible for coming weeks:

- Savers Credit

#### **National Public Liaison**

Security Summit: All sub-groups continue to work with Industry and the states to arrive at mutually agreeable resolutions to issues uncovered. There is some consideration of perfecting a SharePoint site to provide information to IRS staff on the status of Security Summit issues. There is a plan to have an Industry sponsored survey of Tax Professionals (Software Developers/Preparers/Representatives ) released in December to gather information on the number of Tax Professionals who have been impacted by tax related identity theft and the information available to them to report/resolve the issue.

#### **Legislative Affairs**

Upcoming Hearings:

Currently, there are no hearings scheduled.

## **Social Media**

1.) YouTube video embedded/featured on IRS.gov this week:

- Taxes. Security. Together.” <http://youtu.be/aMH8TBeA4IE>
- “Year-End-Tax Tips 2015” <https://youtu.be/ioDPnECgxr4>

2.) IRS.gov front page - Rotating Spotlight

- Protect Your ID (Security Summit)
- Taxpayer Rights
- Health Care and Taxes (Open Enrollment, ALEs)
- Preparing (Series on preparing for the filing season)
- Get the Facts - transcript incident

3.) IRS.gov front page – News

- [ID Theft Tax Tip Series](#)
- [Plan for 2016 Health Flexible Spending Arrangements](#)
- [IRS Tips for Year-End Gifts to Charity](#)
- [Consumer Alert: Beware of Phone Scams](#)

5.) Twitter

- HealthCare Tax Tip #: ACA and Employers - HCTT #77: Understanding the Different Types of 2015 Transition Relief under the Employer Shared Responsibility Provisions <http://go.usa.gov/cjwCd>
- HealthCare Tax Tip #: ACA and Employers – HCTT #76: Four Things to Know about Advance Payments of the Premium Tax Credit <http://go.usa.gov/cTpJB>
- “Taxes. Security. Together.” <http://youtu.be/aMH8TBeA4IE>
- “Tax Scams.” <https://youtu.be/0y5z0kWgBcM>
- Telephone Scams - 1.) <http://go.usa.gov/3sKCK> 2.) <http://go.usa.gov/3vjPY> 3.) <http://go.usa.gov/3rwmn>
- Get Transcripts by mail <http://go.usa.gov/3AKcF>
- Try IRS.gov before you call - tax tools <http://irs.gov/uac/Tools>
- Direct Deposit
- Online Payment Agreements
- Daily YouTube video tweets
- Daily ACA tweets

6.) Tumblr posts scheduled for this week:

Monday 11/30:

- Year-End Tax Tips (video)
- 944/941 Forms

Tuesday 12/1:

- FATCA Registration
- HCTT #67

Wednesday 12/2:

- HCTT #68
- Security Tip #1

Thursday 12/3:

- ITIN (video)
- HCTT #69

Friday 12/4:

- Security Tip #2
- HCTT #70
- Filing Status (video)

### **Visual Education and Communications**

Live/Taped Broadcasts:

- State Of TAS – Polycom/Live Stream (Room 6114) (12/01)
- DCOS Award Ceremony - Polycom/Stream (1111 Auditorium) (12/02)
- AD Town Hall Meeting – Live Stream (12/03)

Streaming Assisted Events:

- N/A

YouTube Postings

- English:
  - Free File
  - Taxes. Security. Together.
  - Year End Tax Tips
  - Welcome to Free File
- Spanish:
  - Responding to Audit Letter
  - Understand Audit Letter
  - Breaking Down Your IRS Response to Audits by Mail Letter
- ASL:
  - N/A

Saba (Centra) Captions:

- LB&I Future State Practice Areas Presentation (11/30)
- Section 508 Office Documents (12/01)
- C&L - PDF Remediation (12/03)
- TEGE - FY 16 EO Awareness Training I (12/04)

Other Projects:

- Commissioner's Security Summit Video Avid Edit (11/30-12/04)

- YouTube Free Help Preparing Tax Return Avid Edit (11/30-12/01)
- EITC Audit Process Avid Edit (12/01-12/03)
- AD Town Hall Rehearsal (12/02)

Service-Wide Video Editorial Board (SVEB)

Two video requests are currently in review with the SVEB and are pending DCOS approval. They are:

- Request #379 – IRS IT AD Vision Video

Request #386 – CI Executive Development Media Training

## **Communications and Liaison – Weekly Activity Report**

### **Week of December 7, 2015**

#### **Internal Communications**

##### Commissioner News

- Commissioner conducts virtual town hall with Phoenix employees (12/10) (Comm)

##### DCSE e-pub

- W&I's Joint Operations Center proves the computer is mightier than the scheme (DCSE)

##### IRS Headlines

- Make Thrift Savings Plan elections by Dec. 23 for the first pay date in 2016 (HCO)
- Act now: Federal benefits open season closes Dec. 14 (HCO)
- Know the rules for gift giving and second jobs (HCO)
- New desktop icon delivers easy IT4U access (IT)
- IRS begins processing 2014 amended returns claiming the Health Coverage Tax Credit (W&I)
- Security is everyone's business (AWSS)

##### Leaders' Alert

- Encourage your employees to donate use-or-lose annual leave they can't schedule (HCO)
- New process for accepting contractor security awareness training certifications (AWSS)
- Help motivate your employees to develop a career path (HCO)
- CCH software won't work on 64-bit computers (RAS)
- HR Connect reminders help manage temporary personnel actions (AWSS)
- Remember to choose a proxy to manage SETR while you're away (AWSS)

##### Poll Question

- How many hours of annual leave did employees forfeit in 2014? (HCO)
- Should formal government writing contain contractions? (C&L)

##### Spotlight

- Protect yourself from lurking germs and viruses (W&I)

#### **National Media Relations**

##### Potential news releases for this week:

- ITIN Passport Policy Change
- New Early Interaction Initiative Aims to Help Employers Stay Current on Their Payroll Taxes

##### Potential news releases possible for coming weeks:

- Savers Credit
- Plan Ahead If You Need a Transcript

#### **National Public Liaison**

##### Professional Stakeholder Relationship Branch

Wednesday Dec. 9, 2015, 1 pm – Monthly Outreach Leadership Call. PGLD will present on their current programs. W&I will provide a filing season preview.

Tuesday Dec. 15, 2015, 9-11 am – American Bar Association Tax Section annual courtesy meeting with Commissioner Koskinen and IRS executives. ABA attendees include Chair George Howell, Chair-Elect William H. Caudill, Vice Chair (Government Relations) Peter Blessing and others. Room 3313.

#### Liaison and Tax Forum Branch

Liaison/Advisory Group received its final Survey Feedback report on the IRS Nationwide Tax Forums. Highlights of the report reflect that customers are genuinely satisfied with the performance of the Tax Forum and continues to rate it exceptionally high with 95% of them rating it 4 or 5 on a 5 point scale. The highest rated factor of those solicited, was the “ease of using the registration process”. This was true across the board for all venues with Denver receiving the highest mark overall. While the overall rating is worthy, participants note that they would like to see seminar content expanded and include more in-depth topics as well as more topics in general. In addition, participants noted that improvement of the presentations were necessary as many of the IRS presenters merely read their material and rated them less than popular than external presenters. Participants also expressed a desire to have more access to presenters for questions and networking. This has been an ongoing theme since the IRS booths in the exhibit hall were eliminated.

#### **Legislative Affairs**

Not IRS Agency Records



Upcoming Hearings:

Currently, there are no hearings scheduled.

#### **Social Media**

1.) YouTube video embedded/featured on IRS.gov this week:

- “Year-end Tax Tips” <https://youtu.be/ioDPnECgxr4>
- ITIN Video (new) <https://youtu.be/jovT1TBKBH4> (currently in private status... Not viewable without password)

2.) IRS.gov front page - Rotating Spotlight

- Protect Your ID (Security Summit)
- Taxpayer Rights
- Health Care and Taxes (Open Enrollment, ALEs)
- Preparing (Series on preparing for the filing season)
- Get the Facts - transcript incident

3.) IRS.gov front page – News

- [ID Theft Tax Tip Series](#)
- [IRS Criminal Investigation Annual Report](#)
- [IRS Tips for Year-End Gifts to Charity](#)
- [Consumer Alert: Beware of Phone Scams](#)

4.) Potential news releases for this week to be featured on front page:

- ITIN Passport Policy Change
- New Early Interaction Initiative Aims to Help Employers Stay Current on Their Payroll Taxes

5.) Twitter

- SPECIAL EDITION TAX TIP--ACA ASPECT <http://go.usa.gov/cZFmT>
- HealthCare Tax Tip #: ACA and Employers – HCTT #79: Answers to Five of Your Questions about the Premium Tax Credit
- HealthCare Tax Tip #: ACA and Employers - HCTT #78: Health Care Law: Tax Considerations for Employers with Fewer than 50 Employees
- Collection Early Interaction Initiative – press release and <http://go.usa.gov/3u5Mh>
- Enhanced FATCA Search tool now available <https://www.irs.gov/Businesses/Corporations/FATCA-Foreign-Financial-Institution-List-Search-and-Download-Tool>>
- Taxes. Security. Together.” <http://youtu.be/aMH8TBeA4IE>
- Security Tax Tips
- “Tax Scams.” <https://youtu.be/0y5z0kWgBcM>
- Telephone Scams - 1.) <http://go.usa.gov/3sKCk> 2.) <http://go.usa.gov/3vjPY> 3.) <http://go.usa.gov/3rwmn>
- Criminal Investigation Releases Annual Report. [#tax go.usa.gov/cB4p9](http://go.usa.gov/cB4p9)
- #SCorporation Shareholder Stock Basis - Webinar on demand. <https://1.usa.gov/1Nwal6J>
- Get Transcripts by mail <http://go.usa.gov/3AKcF>
- Try IRS.gov before you call - tax tools <http://irs.gov/uac/Tools>
- Direct Deposit
- Online Payment Agreements

6.) Tumblr posts scheduled for this week:

Monday, 12/7:

- HCTT #67
- Security Tax Tip #2
- Get Transcript by Mail

Tuesday, 12/8:

- HCTT #68
- Year End Tax Tips (video)
- IRS2Go

Wednesday, 12/9:

- HCTT #69
- FATCA Registration
- Helpful info for tax appeals

Thursday, 12/10:

- HCTT #70

- Security Tax Tip #3
- Direct Pay

Friday, 12/11:

- HCTT #71
- Online Tax Forums
- ID Theft: First Steps for Victims (video)

### **Visual Education and Communications**

Live/Taped Broadcasts:

- DIG Conference - Live/Stream, 1111 (12/9) Pending

Streaming Assisted Events:

- N/A

YouTube Postings

- English:
  - Do It Yourself
  - IRS Tax Calculator
- Spanish:
  - N/A
- ASL:
  - N/A

Saba (Centra) Captions:

- IT - LSR Stage 4 Q & A (12/08)
- TEGE - K-Net Mod 12 - Employee Engagement and Virtual Management (12/08)
- IT - LSR Stage 4 Q & A – Managers (12/08)
- HCO - LEADS End of the Year Town Hall Meeting (12/09)
- IT - Leadership Advantage (12/10)
- IT - More Work, Less Resources, Little Time (12/10)

Other Projects:

- Studio Maintenance Day (12/07)
- English YouTube “IRS Tax Calendar” – Final Cut Pro Edit Offsite (12/07-12/10)
- Five Security Summit Videos – Final Cut Pro Edit Offsite (12/7-12/11)
- English YouTube Taping @ 1111 (12/08)
- ASL TT-53 YouTube Rehearsal (12/08)
- CI Media Training Taping @ 1111 (12/09)
- ASL TT-53 YouTube Taping (12/09)
- Spanish YouTube Taping @ 1111 (12/10)

Service-Wide Video Editorial Board (SVEB)

Two video requests are currently pending DCOS approval. They are:

- Request #386 – CI Executive Development Media Training
- Request #387 – IT Customer Service Support Town hall via web cast



# **Communications and Liaison – Weekly Activity Report**

## **Week of December 14, 2015**

### **Internal Communications**

#### DCSE e-pub

- Houston ATAT group works to improve methods to seizing securities held by brokerages

#### IRS Headlines

- Report interest on back pay income and tax return (AWSS)
- Use Exception Time Reporting to post your time automatically (AWSS)
- Include contact information on your OS GetServices tickets (AWSS)

#### Leaders' Alert

- Use Form 14365 to request forgiveness of advanced leave for separating employees (AWSS)
- Hold requests to restore annual leave until Pay Period 1 of 2016 (AWSS)

#### Poll Question

- Enforcement of Prohibition was originally assigned to the IRS. Which amendment to the United States Constitution repealed Prohibition? (RAS)

#### Spotlight

- Victory in a thank-you note (W&I)

#### KAP

- Security Summit: How information is shared (C&L)

#### Daily News

Individual Shared Responsibility Provision can affect your taxes (ACA)

### **National Media Relations**

Potential news releases for this week:

- Savers Credit
- Plan Ahead If You Need a Transcript—TENATIVE
- Extenders--TENATIVE

Potential news releases possible for coming weeks:

- TBD

### **National Public Liaison**

Candice and Brianne are scheduled to meet with Alice Jacobsohn from the American Payroll Association on December 16<sup>th</sup> to discuss issues about employment taxes and reporting requirements.

### **Legislative Affairs**

Not IRS Agency Records



Upcoming Hearings:

Currently, there are no hearings scheduled.

## **Social Media**

1.) YouTube video embedded/featured on IRS.gov this week:

- IRS Tax Payment Options <https://youtu.be/SedRfC0IoSE>
- “Year-end Tax Tips” <https://youtu.be/ioDPnECgxr4>

2.) IRS.gov front page - Rotating Spotlight

- Protect Your ID (Security Summit & ID Theft Tip #4)
- Taxpayer Rights
- Health Care and Taxes (Open Enrollment, IRA distributions may affect Premium Tax Credit, ALEs)
- Preparing (Series on preparing for the filing season)
- Get the Facts - transcript incident

3.) IRS.gov front page – News

- [Early Interaction Initiative](#)
- [ID Theft Tax Tip Series](#)
- [IRS Criminal Investigation Annual Report](#)
- [Consumer Alert: Beware of Phone Scams](#)

4.) News releases to be featured on front page:

- Savers Credit
- Plan Ahead If You Need a Transcript—TENATIVE
- Extenders--TENATIVE

5.) Twitter

- SPECIAL EDITION TAX TIP--ACA ASPECT <http://go.usa.gov/cZFmT>
- HealthCare Tax Tip #: ACA and Employers – HCTT #79: Answers to Five of Your Questions about the Premium Tax Credit
- HealthCare Tax Tip #: ACA and Employers - HCTT #78: Health Care Law: Tax Considerations for Employers with Fewer than 50 Employees
- Lockbox tweets <http://go.usa.gov/3B9WJ> & <http://go.usa.gov/3B9jk>
- Changing filing requirement to file Form 944 to #Form941 <http://go.usa.gov/cB3Tm>
- Collection Early Interaction Initiative – press release and <http://go.usa.gov/3u5Mh>
- Enhanced FATCA Search tool now available <https://www.irs.gov/Businesses/Corporations/FATCA-Foreign-Financial-Institution-List-Search-and-Download-Tool>>
- Taxes. Security. Together.” <http://youtu.be/aMH8TBeA4IE>
- Security Tax Tips
- “Tax Scams.” <https://youtu.be/0y5z0kWgBcM>
- Telephone Scams - 1.) <http://go.usa.gov/3sKCK> 2.) <http://go.usa.gov/3vjPY> 3.) <http://go.usa.gov/3rwmn>
- Get Transcripts by mail <http://go.usa.gov/3AKcF>
- Try IRS.gov before you call - tax tools <http://irs.gov/uac/Tools>
- Direct Deposit
- Online Payment Agreements

6.) Tumblr posts scheduled for this week:

Monday 12/14:

HCTT #71

Security Tax Tip #4

Tuesday 12/15:

944/941 Forms

944/941 Open Season

Wednesday 12/16:

Tax Payment Options

Year-End Tax Tips (video)

Thursday 12/17:

HCTT #72

Get Transcript by Mail

Friday 12/18:

HCTT #73

Withholding Calculator (video)

### **Visual Education and Communications**

Live/Taped Broadcasts:

IT: EOPS Town Hall Meeting – Polycom/Stream (12/17)

Streaming Assisted Events:

- N/A

YouTube Postings

• English:

- N/A

• Spanish:

- N/A

• ASL:

- N/A

Saba (Centra) Captions:

- C&L - Hot Topic ACA Update (12/15)

Other Projects:

- Five Security Summit Videos – Final Cut Pro Edit Offsite (12/14-12/16)
- Spanish YouTube – Avid Edit (12/14-12/18)
- ALS TT-53 YouTube - Avid Edit (12/15-12/18)
- English YouTube Taping @1111 (12/15)
- ASL TT-53 YouTube Audio Recording (12/16)
- IT: EOPS Town Hall Test/Rehearsal (Poly/Stream) (12/16)

Service-Wide Video Editorial Board (SVEB)

Seven video requests are currently in review with the SVEB and are pending DCOS approval. They are:

- YouTube Request #90 – Military Tax Tips: Combat Pay Exclusion

- YouTube Request #91 – EITC Compliance Video
- YouTube Request #92 – EITC Promotion
- Request #389 – TEGE FSLG Form 1099-MISC Captivate Video
- Request #390 – TEGE FSLG Form W-9 Captivate Video
- Request #392 – SBSE Tangible Property Regulations Webinar – Rebroadcast Request

Request #393 – SBSE Circular 230 Webinar – Rebroadcast Request via On-stream Media

## **Communications and Liaison – Weekly Activity Report Week of June 27, 2016**

### **Internal Communications**

Highlights from Services and Enforcement (DCSE e-pub)

- Customer Early Warning System keeps small problems from becoming big ones (DCSE)

Leaders' Alert

- Complete OS GetServices, HR Connect actions when employees vacate workspace due to separation (HCO)
- Keep track of appraisal deadlines with ePerformance progress reports (HCO)
- Learn about change leadership skills and relationship-building (HCO)

Poll Question

- Where do you go to verify your salary direct deposit information is accurate? (AWSS)
- When was the first commemorative Independence Day fireworks display in the United States? (C&L)

Spotlight

- Born in the USA? (Americana quiz) (C&L)
- The age of fixer uppers (home repairs) (Multiple)

Daily News (Webbies)

- Use new SETR code to capture Freedom of Information Act-related activities (PGLD)
- Political photos in the workplace can violate the Hatch Act (HCO)
- Use ConcurGov to make work-related airline reservations (CFO)
- Protect taxpayers: Keep your desk clean, free of sensitive and private information (AWSS)

### **Media Relations**

Potential news releases for this week:

- Security Summit Update
- June 29 webinar on foreign earned income exclusion
- Summertime tax tips start July 1; sign up now for tips in English and Spanish

Potential news releases possible for coming weeks:

- On-demand economy
- User fee changes
- New law delays EITC and ACTC refunds to February 15
- Deadline for 2016 taxes is April 18, 2017

### **National Public Liaison**

National Public Liaison will invite three ETAAC members transitioning to the IRSAC and IRPAC to upcoming advisory committee meetings. Two ETAAC members are transitioning to IRSAC, which meets July 19-20, and one to the IRPAC, which meets Aug. 16-17.

June 29-30 – IRS is hosting an Earned Income Tax Credit (EITC) Summit. Approximately 55 external stakeholders will participate in two sessions on Wednesday and one session on Thursday. Room 2615.

## **Legislative Affairs**

Not IRS Agency Records



New Hearing:

On Thursday, July 7, 2016, a hearing is scheduled to be held before the House Ways and Means Committee on the Cost Sharing Reduction (CSR) Program implemented by the Affordable Care Act. The hearing is scheduled for 10:00 am, in room 1100 of the Longworth House Office Building.

Witnesses: Commissioner John Koskinen is scheduled to testify.

## **Social Media**

## **Visual Education and Communications**

Internal Programs

### **1. SABA Sessions (Captioning):**

HCO - Celebrating Veteran Employees (06/28)

Audience: Invites to Veteran employees, Deputy Commissioners, Business Unit Commissioners, Human Capital Officer, Acting Director, Employment, Talent and Security, Veterans Program Office staff, Military Outreach for Service leadership  
Estimated total of attendees is over 8000.

Informational/Training

TEGE - Bank Secrecy Act Updates (06/29)

Audience: IRS Employees  
Informational/Training

TEGE - CPE - Foreign Activities of Exempt Organizations (06/29)

Audience: IRS Employees  
Informational/Training

IT - CSS Town Hall (06/30)

Audience: IRS RAS Employees  
Informational/Training

EDI - RA and the Appeal Process (06/30)

Audience: IRS managers from all the business units and located in various PODs around the country.  
Informational/Training

2. Other Projects: (i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)

Spanish YouTube Tax Tips - FCP Edit (06/27-06/29)

- Claiming the HCTC
- Reminders for Extension Filers

ASL YouTube Tax Tips – FCP Edit (06/28-06/30)

- Reminders for Extension
- Claiming the Health Coverage Tax Credit
- How to Use Get Transcript Online
- HCO Taping @1111 – (06/28)
- Audio Recording - Voice Over for ASL YouTube Tax Tips (06/29)
- CI Fusion Center Video Taping (06/29)
- 2016 LTPA Commissioner Video Taping @1111 (06/29)  
Topic: Latino Tax Professionals Association  
Audience: External, Latino Professionals
- CI Counter terrorism Video Taping (06/30)

## External Programs

1. Videos Uploaded to IRS YouTube Channels:

- Spanish Videos:
  - How To Get Transcripts Online
- English Videos:
  - Nationwide Tax Forum
  - Health Care Law: Information Reporting for Employees
  - Health Care Law: Highlights for Applicable Large Employers

2. Servicewide Video Editorial Board (SVEB) – External:

Request #467– ACA Understanding Error Messages for ACA Information Returns Web Video

Target Audience: External audience: Advisory groups, employers (small and large), health insurance providers, federal government agencies, State Medicaid/CHIP agencies, state and local governments, payroll industry, educational institutions, practitioners, transmitters and software industry. Audience size: recorded session will not include an audience. Estimate 50K will view the archive.

Informational/Educational message

Request #468 – SBSE Certification for Professional Employer Organizations (CPEO) Webinterpoint Sessions

Target Audience: External – Industry group, Audience Size: approximately 300-500 per session.

Informational/Educational message

Request #469– SBSE Tax Preparers: Safeguarding Taxpayer Data and Preventing Identity Theft Audio Webinar

Target Audience: External – Tax Practitioners. Expected audience size: 8,000

Informational/Educational message

Request #470– TEGE Employee Plans Compliance Unit (EPCU) – 2016 Updates Audio Webcast

Target Audience: External - Tax, Benefit, Pay Roll and HR Practitioners; Estimated audience size – 3,000

Informational/Educational message

Request #471– TEGE Employee Plans Determination Letter Program Changes In 2017Audio Webcast

Target Audience: External - Tax, Benefit, Pay Roll and HR Practitioners; Estimated audience size – 3,000

Informational/Educational message



# **Communications and Liaison – Weekly Activity Report**

## **Week of July 5, 2016**

### **Internal Communications**

Highlights from Services and Enforcement (DCSE e-pub)

- LB&I launches new examination process (DCSE)

IRS Headlines

- Eagle Horizon exercise tests IRS emergency handling abilities (AWSS)
- End of year publishing requests due by July 15 (W&I)

Leaders' Alert

- Complete the Critical Job Elements Form 6774 annually for your employees (HCO)
- Alert your employees to reset passwords July 10-29 or they'll lose access to critical systems (IT)
- Contracting officer representatives protect our IT systems and sensitive data (Procurement)
- Mandatory briefings available beginning July 11 (HCO)
- Remind your employees: Time-off awards deadline approaching (HCO)

Spotlight

- Time to unwind (How employees re-energize after work) (C&L)
- Saying hello or goodbye (retirement) (C&L)

Daily News (Webbies)

- 50 years of keeping government accountable to the people (PGLD)
- Java upgrade will require password changes (IT)
- New job aid assists when submitting software changes, work requests (IT)

### **Media Relations**

Potential news releases for this week:

- Security Summit Update
- June 29 webinar on foreign earned income exclusion
- Summertime tax tips start July 1; sign up now for tips in English and Spanish

Potential news releases possible for coming weeks:

- On-demand economy
- User fee changes
- New law delays EITC and ACTC refunds to February 15
- Deadline for 2016 taxes is April 18, 2017

### **National Public Liaison**

Potential news releases for this week:

- Deadline for 2016 taxes is April 18, 2017
- Security Summit – tax pro campaign

Potential news releases possible for coming weeks:

- On-demand economy
- User fee changes

New law delays EITC and ACTC refunds to February 15

### **Legislative Affairs**

### **Upcoming Hearings:**

On Thursday, July 7, 2016, a hearing is scheduled to be held before the House Ways and Means Oversight Subcommittee on the Cost Sharing Reduction (CSR) Program implemented by the Affordable Care Act. The hearing is scheduled for 10:00 am, in room 1100 of the Longworth House Office Building.

Witnesses: Commissioner John Koskinen is scheduled to testify.

### **Social Media**

- 1.) YouTube video embedded/featured on IRS.gov this week:
  - 2016 Nationwide Tax Forums [https://youtu.be/2rFYcXK\\_oC0](https://youtu.be/2rFYcXK_oC0)
- 2.) IRS.gov front page - Rotating Spotlight
  - Security Summit
  - If You... (File, Pay, MyRa)
  - Disaster Planning
  - Phishing and Tax Scams
  - Health Care & Taxes
- 3.) IRS.gov front page – News
  - [Avoid Fake Charities for Orlando Shooting Victims](#)
  - [Sign up for our Summertime Tax Tips](#)
  - [Notify IRS when your address changes](#)
  - [Scam Alert: Fake “Federal Student Tax”](#)
- 4.) Twitter (@IRSnews now has 76,849 followers, @IRStaxpros has 39,745 followers)

- Sign Up for #IRS Summertime #Tax Tips. <http://go.usa.gov/x3BWw>
- #IRS to college students: Be wary of IRS impersonators and a “federal student #tax” which does NOT exist <http://go.usa.gov/cSqHP>
- Don't be complacent during #HurricaneSeason. Prepare your #smallbiz now! <http://go.usa.gov/cSPQ4>
- #FBAR questions? Email [FBARquestions@irs.gov](mailto:FBARquestions@irs.gov)
- Online Payment Agreements <http://go.usa.gov/4F33>
- “Tax Scams.” and Telephone Scams <http://go.usa.gov/3sKCk>  
<http://go.usa.gov/3vjPY> <http://go.usa.gov/3rwmn>

#### Key Tweets for Technical Communications Branch

- HCTT #56: File Now: Don't Jeopardize Your Advance Payments of the Premium Tax Credit <http://go.usa.gov/chsdR>
- Recorded webinar on #employer #HealthCare ACA reporting requirements. <http://go.usa.gov/cuXPm>
- HealthCare ACA Fact Sheet - <http://go.usa.gov/cVrad>

#### Tumblr

7/5:

Chicago Tax Forum  
STT #1 Tax Scams

7/6:

STT #2 - Amended Returns  
Security Summit: Be cautious using wifi (video)

7/7:

Child and Dependent Care Credit this Summer  
Withholding Calculator (video)

7/8:

STT #3 – Taxpayers Who Owe  
New Orleans Tax Forum

### **Visual Education and Communications**

#### Internal Programs

##### 1. Video to Desk-top – Live or Recorded Events:

Virtual Town Hall Meeting -SB/SE Field Collection - Live Streaming (07/07)  
Virtual Town Hall with Director Field Collection, Darren Guillot. Mr. Guillot would like to hold a Town Hall addressing his employees on Employment Tax Compliance. Mr. Guillot will be joined by Caroline Ciraolo from the DOJ.  
Audience: SB/SE Field Collection employees

Chief Counsel: LB&I Town Hall @1111 - Polycom/Stream (07/08)  
Leadership Transition and Organizational Updates  
Audience: The primary audience is Counsel LB&I attorneys and paralegals.  
Anticipate approximately 220 participants in 39 nationwide locations will view the program.

##### 2. SABA Sessions (Captioning):

TEGE - New Determination Program Revenue Procedure (07/06)  
Audience: The main audience is Grade 11-13 Revenue Agents and Tax Law Specialists. There are some clerical, managers and analysts.  
Informational/Training

EDI - Disability Etiquette (07/06)  
Audience: IRS managers and employees from all the business units and located in various PODs around the country.  
Informational/Training

EDI - RA: Medical Confidentiality and Disclosure (07/07)  
Audience: IRS EDI managers located in various PODs around the country.  
Informational/Training

LBI - Basket Transactions CPE (07/07)  
Audience: IRS employees  
Informational/Training

3. Other Projects: *(i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)*

Spanish YouTube Tax Tips - FCP Edit (07/05-07/06)

- Claiming the HCTC
- Reminders for Extension Filers

English YouTube Tax Tips – FCP Edit (07/05, 07/07)

- Employer Tax Withholding

Tape CI Counter Terrorism Video Taping (07/06)

4. Servicewide Video Editorial Board (SVEB) – Internal:

Request #472– SBSE Exam Employment Tax Virtual FY16 CPE web videos  
Target Audience: Internal. The audience will include all Employment Tax field examiners Revenue Agents, Revenue Officer Examiners, Tax Compliance Officers, Tax Examiners as well as analysts from Employment Tax Policy and other operating divisions such as Appeals and Taxpayer Advocate. Expected Audience size is approximately 450+  
Educational/Informational message

Request #473 – LB&I Commissioners Video Introduction for All Managers Training Web Video

Target Audience: Internal. All LB&I Managers nationwide and international  
Educational/Informational message

External Programs

1. Videos Uploaded to IRS YouTube Channels:

- English Videos:
  - Health Care Law: Information Reporting for Employers
  - Reminder for Extension Filers
- ASL Videos:
  - Health Care Law: Information Reporting for Employers

- Spanish Videos:  
2016 IRS Nationwide Tax Forums

# **Communications and Liaison – Weekly Activity Report**

## **Week of July 11, 2016**

### **Internal Communications**

#### Commissioner News

- Commissioner conducts town halls with Chicago employees (Comm)

#### DCSE e-pub

- IRS rolls out cash payment option (DCSE)

#### Headlines

- Join Leave Bank now through Aug. 10 (HCO)
- Mandatory briefings now available (HCO)
- Learn the annual leave rules for your appointment (HCO)
- Use these workarounds to correctly print ePerformance narratives (HCO)

#### Leaders' Alert

- Encourage your employees to use ground shipping to help reduce costs (W&I)
- Remember the rules when filling bargaining unit internal vacancies (HCO)
- Review the new Quality Step Increase procedures (HCO)
- Follow steps to request forgiveness of advanced leave for separating employees (HCO)

#### Poll Question

- Which president instituted the Feds Feed Families Program? (AWSS)

#### Spotlight

- National Give Something Away Day (C&L)

### **Media Relations**

No Potential news releases for this week:

Potential news releases possible for coming weeks:

- Deadline for 2016 taxes is April 18, 2017
- Sharing economy page launched
- User fee changes
- Update and reminder for CPEO applicants
- Highway use tax reminder for truckers
- New law delays EITC and ACTC refunds to February 15

### **National Public Liaison**

July 12 – Commissioner Koskinen will deliver the Keynote Address at the Chicago IRS Nationwide Tax Forum.

July 12, 2 p.m. – Tax Talk Today (Agriculture Issues).

July 13, 1 p.m. – Outreach Leadership Call.

July 18-20 – AICPA Advanced Estate Planning Conference will be held at the Marriott Wardman Park Hotel. Various IRS speakers from SBSE and Counsel.

July 21 – NPL Monthly Practitioner Meeting (Room 2116).

### **Legislative Affairs**

### UPCOMING HEARINGS:

Currently, there are no hearings scheduled.

### Social Media

- 1.) YouTube video embedded/featured on IRS.gov this week:
  - 2016 Nationwide Tax Forums [https://youtu.be/2rFYcXK\\_oC0](https://youtu.be/2rFYcXK_oC0)
  - Tax Scams <https://youtu.be/0y5z0kWgBcM>
- 2.) IRS.gov front page - Rotating Spotlight
  - National Taxpayer Advocate Report
  - Security Summit
  - If You... (File, Pay, MyRa) ... (add "If you need to visit the IRS")
  - Phishing and Tax Scams
  - Health Care & Taxes
- 3.) IRS.gov front page – News
  - Tax Pros: Protect Your Clients; Protect Yourself
  - Sign up for our Summertime Tax Tips
  - Notify IRS when your address changes
  - Scam Alert: Fake "Federal Student Tax"
- 4.) Twitter (@IRSnews now has 76,947 followers, @IRStaxpros has 39,842 followers)
  - #IRS seeking college interns for projects related to the #IRS website [www.irs.gov](http://www.irs.gov) <http://go.usa.gov/xcVDJ>
  - Sign Up for #IRS Summertime #Tax Tips. <http://go.usa.gov/x3BWw>
  - #IRS to college students: Be wary of IRS impersonators and a "federal student #tax" which does NOT exist <http://go.usa.gov/cSqHP>
  - Operate a truck or other heavy highway motor vehicle? Check out #IRS trucking #tax center. <http://go.usa.gov/TPyW> E-file #Form2290
  - #Bigrig truckers: E-file #Form2290. <http://IRS.gov/truckers>
  - Online Payment Agreements <http://go.usa.gov/4F33>

- “Tax Scams.” and Telephone Scams <http://go.usa.gov/3sKCk>  
<http://go.usa.gov/3vjPY> <http://go.usa.gov/3rwmn>

#### Key Tweets for Technical Communications Branch

- HCTT #59: It's Time for a PTC Checkup for your 2016 Health Insurance Marketplace Coverage <http://go.usa.gov/xcmYT>
- Recorded webinar on #employer #HealthCare ACA reporting requirements. <http://go.usa.gov/cuXPm>
- HealthCare ACA Fact Sheet - <http://go.usa.gov/cVrad>

#### Tumblr

7/11:

- STT #4
- Getting Married

7/12:

- HCTT #57
- NOLA Tax Forum

7/13:

- STT #5
- Child Care

7/14:

- HCTT #58
- Get Transcript

7/15:

- STT #6

Withholding Calculator (video)

### **Visual Education and Communications**

#### Internal Programs

##### 1. SABA Sessions (Captioning):

EDI - Let's Take a Look at the RA Request Form 13661 (07/13)

Audience: IRS managers/employees from all the business units and located in various PODs around the country.

Informational/Training

IT - IRS Editorial Board Video Guidance (07/13)

Audience: The audience for the session will be IT Managers

Informational/Training

IT - Becoming a Team Player (07/14)

Audience: The audience includes all Information Technology employees (all grade levels) and managers who are located nationwide.

Informational/Training

##### 2. Other Projects: *(i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)*



English YouTube Tax Tips – FCP Edit (07/11–07/15)

- Commissioner's Latino Tax Professional Association (LPTA) Greeting Video
- EITC Audit Process
- Getting Married

SBSE: Knowledge Management Portal Captivate Video – Audio Recording (07/12)

LB&I All Managers Future State Workshop Commissioner Introduction Video Taping (07/15)

Topic: Produce an introduction video for the face to face all managers' workshops being held in August (separate from the virtual sessions on July 26, 27, and 29). The presenters will be LB&I Commissioner Doug O'Donnell, and LB&I Deputy Commissioner Rosemary Sereti. The intro will be around 15 minutes.

Audience: All LB&I Managers

### 3. Servicewide Video Editorial Board (SVEB) – Internal:

Request #474 – LB&I Rick Byrd Presentation to all LB&I Managers Live Webcast and Web Video

Target Audience: Internal. All LB&I managers nationwide and international  
Informational/educational message

### External Programs

#### 1. Videos Uploaded to IRS YouTube Channels:

- English Videos:
  - Health Care Law: Information Reporting for Employers
  - Reminder for Extension Filers
- Spanish Videos:
  - Reminders for Extension Filers

#### 2. Servicewide Video Editorial Board (SVEB) – External:

Request #475 – TEGE Audio Webcast: ITG / SBSE Stakeholder Collaboration - IRS Tax Calendar for Businesses and Self-Employed

Target Audience: External - Tax, Benefit, Pay Roll and HR Practitioners. Estimated audience size – 5,000

Informational/educational message

Request #476 – TEGE Audio Webcast: Individual Indian Tax Issues: Per Capita Payments

Target Audience: External – Indian Tribal Governments and their tribal members  
Expected audience size 1000+

Informational/educational message

Request #477 – TEGE Audio Webcast: Individual Indian Tax Issues: Income Derived from the Land & Fishing Rights

Target Audience: External – Indian Tribal Governments and their tribal members  
Expected audience size 1000+

Informational/educational message

# **Communications and Liaison – Weekly Activity Report**

## **Week of July 25, 2016**

### **Internal Communications**

#### IRS Headlines

- Receive up to 70 percent off college tuition (HCO)
- Time-off awards deadline is approaching (HCO)

#### Leaders' Alert

- Ogden manager shares her Walk In My Shoes experience (HCO)
- New ConcurGov login process begins Aug. 8 (AWSS)

#### Poll questions

- In what year was the American with Disability Act signed into law? (EDI)
- What year did The Beatles release "Taxman" in the United States? (C&L)

#### Spotlight

- Spotlight revisited--where is he now? (LB&I)
- Two of a kind (IRS positions with two employees) (Multiple)

#### Webbie

- Don't forget: Change passwords by 7/29 or lose access to key IRS systems and servers (IT)

### **Media Relations**

### **National Public Liaison**

Tuesday, July 26 – Thursday, July 28 – IRS Nationwide Tax Forum will be held at the Hyatt Regency New Orleans, in New Orleans, LA. The keynote address and the IRS Future State Initiative session will be delivered by David Alito, Deputy Commissioner, W&I.

### **Legislative Affairs**

#### UPCOMING MEETINGS:

Currently, there are no meetings scheduled.

#### UPCOMING HEARINGS:

Currently, there are no hearings scheduled.

### **Social Media**

#### 1.) YouTube video embedded/featured on IRS.gov this week:

- Tax Scams <https://youtu.be/0y5z0kWgBcM>
- Health Care Law: Information Reporting for Employers <https://youtu.be/lhE5kvisi4w>

#### 2.) IRS.gov front page - Rotating Spotlight

- Summer Tax Tips Series
- Security Summit
- If You... (get a letter from the IRS, need in-person help to resolve a tax issue, need a retirement account myRA)

- Phishing and Tax Scams
- Health Care & Taxes

### 3.) IRS.gov front page – News

- [Tax Pros: Protect Your Clients; Protect Yourself](#)
- [Day Camp or Care May Qualify for a Tax Credit](#)
- [Notify IRS when your address changes](#)
- [Scam Alert: Fake “Federal Student Tax”](#)

### 4.) Twitter (@IRSnews now has 77,147 followers, @IRStaxpros has 39,998 followers)

- Sign Up for #IRS Summertime #Tax Tips. <http://go.usa.gov/x3BWw>
- The next #2016NationwideIRSTaxForum is in #NOLA July 26-28. Register now. <http://go.usa.gov/cwye3>
- #IRS to college students: Be wary of IRS impersonators and a “federal student #tax” which does NOT exist <http://go.usa.gov/cSqHP>
- Operate a truck or other heavy highway motor vehicle? Check out #IRS trucking #tax center. <http://go.usa.gov/TPyW> E-file #Form2290
- #Bigrig truckers: E-file #Form2290. <http://IRS.gov/truckers>
- Online Payment Agreements <http://go.usa.gov/4F33>
- “Tax Scams.” and Telephone Scams <http://go.usa.gov/3sKCK>  
<http://go.usa.gov/3vjPY> <http://go.usa.gov/3rwmn>

### Key Tweets for Technical Communications Branch

- HCTT #61 #HealthCare: How seasonal workers affect #employer workforce size. <http://go.usa.gov/xadCY>
- HCTT #60: #Employers: A refresher on how the #HealthCare law affects you. <http://go.usa.gov/xxTEC>
- HCTT #59: It's Time for a PTC Checkup for your 2016 Health Insurance Marketplace Coverage <http://go.usa.gov/xcmYT>
- #Employers & coverage providers: Webinar explains correcting information returns. <http://go.usa.gov/xaPXW>
- Recorded webinar on #employer #HealthCare ACA reporting requirements. <http://go.usa.gov/cuXPm>
- HealthCare ACA Fact Sheet - <http://go.usa.gov/cVrad>

### FaceBook - Static FaceBook Ads - <https://www.facebook.com/IRS/>

- Health Coverage Providers
- Tax Scams
- Exempt Organization Select Check (new)
- Taxpayer Bill of Rights

## **Visual Education and Communications**

### Internal Programs

#### 1. Video to Desk-top – Live or Recorded Events:

Kickoff for 2016 Managers CPE – Polycom/Stream @1111 (07/28)

Topic: This Kickoff meeting will launch the 2016 IRS Managers Continuing Education Program. There will be several speakers, including the Commissioner, one or both Deputy Commissioners, and several executives.

Audience: All IRS Managers (about 8,300 people), in every location, through the service, ranging in grades for GS-7 through SES.

## 2. SABA Sessions (Captioning):

LBi - Managing in the Future State - Workshop Introduction (07/26)

Audience: All LB&I Managers (approx. 700 individuals)

Informational/Training

LBi - New Permanent Grade 14 and 13 PDs and Related (07/26)

Audience: All LB&I Managers (approx. 700 individuals)

Informational/Training

PDB - Fixing Common Accessibility Problems in PDF Documents (07/26)

Audience: The audience is a vast variety of Communicators throughout the Service.

Informational/Training

LBi - Labor Relations - Effective Communication Skills (07/26)

Audience: All LB&I Managers (approx. 700 individuals)

Informational/Training

LBi - Managing in the Future State - Campaign Process (07/27)

Audience: All LB&I Managers (approx. 700 individuals)

Informational/Training

HCO - Manager Follow-Up Session: Manager Coaching Approach to Conversations Follow-Up (07/27)

Audience: The audience will be HCO, EDI and Executive Secretariat Managers for the 1st and 3rd sessions, and HCO, EDI and Executive Secretariat NBU employees for the 2nd session.

Informational/Training

LBi - Managing in the Future State - Campaign Panel Discussion (07/27)

Audience: All LB&I Managers (approx. 700 individuals)

Informational/Training

IT - Leading Others, Group Leadership, Many Generations but Only One Workforce (07/28)

Audience: The audience is composed of IT Managers and Employee who wish to become managers.

Informational/Training

TEGE - TEGE Admin CPE-Relationship Management and Rapport (07/28)

Audience: All IRS Employees

Informational/Training

EDI - Finding of Discrimination with Employees with Disabilities (07/28)

Audience profile: IRS managers from all the business units and located in various PODs around the country.

Informational/Training

LBi - Managing in the Future State - Data Analytics (07/29)

Audience: All LB&I Managers (approx. 700 individuals)

Informational/Training

LBI - The LBI Virtual Library Bookshelf (07/29)  
Audience: All LB&I Managers (approx. 700 individuals)  
Informational/Training

LBI - Managing in the Future State - Close Out (07/29)  
Audience: All LB&I Managers (approx. 700 individuals)  
Informational/Training

3. Other Projects: *(i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)*

English YouTube Tax Tips – FCP Edit (07/26-07/29)

- Employer Tax Withholding Responsibility
- Commissioner's Data Security Message
- Appeals Collections

Welcome To EDI (Equality Diversity and Inclusion) - FCP (07/25-07/29)

Criminal Investigation (CI) Fusion Center Taping @1111 (07/25)

4. Servicewide Video Editorial Board (SVEB) – Internal:

Request #479 – SBSE Virtual Town Hall for Front-Line Managers – August 10, 2016  
Target Audience: Internal – Approx. 1,800 front line managers  
Informational message

External Programs

1. Videos Uploaded to IRS YouTube Channels:

- English Videos:
  - Health Care Law: Information Reporting for Employers
  - Reminder for Extension Filers

2. Servicewide Video Editorial Board (SVEB) – External:

YT Request #114 – PATH Section 201  
Target Audience: External. Taxpayers  
Informational/educational message

YT Request #115 – Three Ways to Pay  
Target Audience: External. Taxpayers  
Informational/educational message

# **Communications and Liaison – Weekly Activity Report**

## **Week of August 8, 2016**

### **Internal Communications**

#### Leaders' Alert

- You're the first point of contact for employees with payroll issues (HCO)

#### Other News

- Security Summit: Involving our tax professional community (C&L)

#### Poll Question

- What element must be present for many tax criminal prosecutions? (SBSE)

#### Spotlight

- When a stranger calls (National Fraud Awareness Week) (Multiple)

#### Daily News (Webbies)

- Final 2016 Leave Bank open season closes 8/10 (HCO)

### **Media Relations**

#### Potential news releases for this week:

- Deadline for 2016 taxes is April 18, 2017
- Sharing economy
- User fee changes for installment agreements and offers in compromise
- Mid-year check your withholding reminder/New law delays EITC and ACTC refunds to Feb. 15

#### Potential news releases possible for coming weeks:

Deadline nears for work opportunity credit certification

### **National Public Liaison**

Weds. Aug. 10, 10:45 -11:15 am – National Society of Accountants President Kathy Hettig, Executive Vice President John Ams and other NSA members meet with Commissioner Koskinen. Room 3000.

Tues. Aug. 16 - Weds. Aug. 17 – Information Reporting Program Advisory Committee (IRPAC) working meeting.

### **Legislative Affairs**

NOT IRS AGENCY RECORDS



## **Social Media**

### 1.) YouTube video embedded/featured on IRS.gov this week:

- How To Use Get Transcript Online <https://youtu.be/pASG585PM5A>
- (possible) 2016 IRS Nationwide Tax Forums [https://youtu.be/2rFYcXK\\_oC0](https://youtu.be/2rFYcXK_oC0) (Aug 23 in DC, Aug 30 in Orlando, Sept 13 in San Diego)

### 2.) IRS.gov front page - Rotating Spotlight

- ITIN Renewal
- Summer Tax Tips Series
- Security Summit
- Phishing and Tax Scams
- Health Care & Taxes

### 3.) IRS.gov front page – News

- [Most Truckers' Highway Use Tax Returns Due Aug. 31](#)
- [Summer Tax Scams: Robo-calls, iTunes Gift Cards](#)
- [Tax Pros: Protect Your Clients; Protect Yourself](#)
- [If You Need a Retirement Account, Try myRA](#)

### 4.) Twitter (@IRSnews now has 77,382 followers, @IRStaxpros has 40,164 followers)

- ITIN - #ITINinfo [go.usa.gov/x2Xzd](http://go.usa.gov/x2Xzd)
- Tax Tips This week: Monday - ID Theft, Wednesday - Online tools, Friday – Starting a Business
- Learn about #IRS FY 17 Security Summit initiatives; Aug. 17 webinar [go.usa.gov/x4ZUG](http://go.usa.gov/x4ZUG) #IDtheft - #CEcredit = 1 fed tax
- File for an #IRS extension for your #taxes? The fastest way to your refund is to e-file and choose #DirectDeposit
- Check first before you go, many #IRS offices now operate by appointment. [go.usa.gov/cwjDQ](http://go.usa.gov/cwjDQ)
- Sign Up for #IRS Summertime #Tax Tips. <http://go.usa.gov/x3BWw>
- #2016NationwideIRSTaxForum. Register now. <http://go.usa.gov/cwye3>
- #IRS to college students: Be wary of IRS impersonators and a “federal student #tax” which does NOT exist <http://go.usa.gov/cSqHP>

- #Bigrig truckers: E-file #Form2290. <http://IRS.gov/truckers>
- "Tax Scams." and Telephone Scams <http://go.usa.gov/3sKCk>  
<http://go.usa.gov/3vjPY> <http://go.usa.gov/3rwmn>

#### Key Tweets for Technical Communications Branch

- HCTT #63 Find valuable info on the #HealthCare law at IRS.gov & on #IRS social media. <http://go.usa.gov/x2bNR>
- HCTT #62: File your 2015 #tax return this summer to avoid losing advance payments of the premium tax credit. <http://go.usa.gov/xYdm3>
- #Employers & coverage providers: Webinar explains correcting information returns. <http://go.usa.gov/xaPXW>
- Recorded webinar on #employer #HealthCare ACA reporting requirements. <http://go.usa.gov/cuXPm>
- HealthCare ACA Fact Sheet - <http://go.usa.gov/cVrad>

#### FaceBook - Static FaceBook Ads - <https://www.facebook.com/IRS/>

- Health Coverage Providers
- Tax Scams
- Exempt Organization Select Check (new)
- Taxpayer Bill of Rights
- YouTube Videos

#### Tumblr.com

##### 8/8: STT #16

DC Tax Forum

##### 8/9: Data Theft Webinar

HCTT #61

##### 8/10: STT #17

Tax Scams

##### 8/11: HCTT #62

Summer Day Camp Expenses

##### 8/12: STT #18

- Summer Wedding

#### **Visual Education and Communications**

##### Internal Programs

##### 1. Video to Desk-top – Live or Recorded Events:

SBSE Commissioners Town Hall - Live Stream (08/10)

Topic: SBSE Commissioners Karen Schiller and Mary Beth Murphy along with their Execs Robert Hunt, Scott Prentky and (b) (6) would like to hold a virtual town hall for SBSE front line managers' questions and concerns.

Audience: SBSE front line managers, multiple locations.

##### 2. SABA Sessions (Captioning):



EDI - D&I Deep Dive: An interactive discussion about D&I Practitioners (08/09)  
Audience: NHQ EDI Diversity and Inclusion Division staff: Management and Program Assistants, Diversity & Inclusion Specialist, Managers, Senior Manager, Senior Advisors.  
Informational/Training

TEGE - Tax Court Presentation & Third Party Contact (08/10)  
Audience: IRS Employees  
Informational/Training

HCO - 2016 Managers CPE (08/11)  
Audience: All IRS Managers, GS-5 through SES  
Informational/Training

IT - Using Technology Tools (08/11)  
Audience: Audience consists of IT employees at all grade levels and some from other BODs.  
Informational/Training

EDI - Social Networking Research for Compliance Purpose 7114 Meeting (08/12)  
Audience: EDI Employees  
Informational

3. Other Projects: (i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)

English YouTube Tax Tips – FCP Edit (08/08-08/11)

- Getting Married
- Appeals Collection
- SBSE New Hire Video

Welcome To EDI (Equality Diversity and Inclusion) - FCP (08/08)

ITINs/Filing Tips English YouTube @1111 (08/10)  
Topic: ITINs/Filing Tips English YouTube Taping  
Audience: External Taxpayers  
Second Topic: SBSE Revenue Officer Introduction Taping with Darren Guillot  
Audience: Internal RO Employees

Captioning: Intro for Training: Shenita Hicks (08/10)  
Encoding and XML file for posting to the web  
Audience: Internal

Criminal Investigation Fusion Center Videos- FCP (08/08-08/11)

## External Programs

1. Videos Uploaded to IRS YouTube Channels:

- English Videos:

- Appeals Collection
- IRS Commissioner-Premium Tax Credit public
- Getting Married

2. Servicewide Video Editorial Board (SVEB) – External:

YT Request #119 – New Rules for ITINs

Target Audience: External. Taxpayers

Informational/educational message

Request #482 – SBSE Completing Form 656 (Offer in Compromise) Video

Target Audience: External – Taxpayers who owe large tax amounts and cannot pay the full amount.

Expected Audience size is hard to guess: 5,000-20,000

Informational/educational message

# **Communications and Liaison – Weekly Activity Report**

## **Week of August 15, 2016**

### **Internal Communications**

#### Commissioner News

- Koskinen tells Brookhaven, “We are moving in the right direction” (C&L)
- Meetings: NextGen members welcome John Dalrymple for brown bag lunch (DCSE)

#### IRS Headlines

- TE/GE Knowledge Management Portal now available for all employees (TE/GE)
- Are you entitled to a Sunday premium pay? (HCO)
- Records Radar: What are records control schedules? (PGLD)

#### Leaders’ Alert

- Encourage your employees to volunteer for the 2016 Combined Federal Campaign (AWSS)

#### Other News

- IRS Cares: Project Linus finds a common thread (W&I)

#### Poll Question

- According to the National Taxpayer Advocate's FY 2017 Objectives Report to Congress, what are the priority issues TAS will address in fiscal year 2017 (TAS)

#### Spotlight

- Going for the gold (Rio Olympics) (Multiple)

### **Daily News (webbies)**

- Explore methods for developing change leaders in a Managers CPE session on 8/16 (HCO)
- Human Resources Reporting Center unavailable week of 8/22 (AWSS)

### **Media Relations**

#### Potential news releases for this week:

- Deadline for 2016 taxes is April 18, 2017
- Sharing economy
- User fee changes for installment agreements and offers in compromise
- Mid-year check your withholding reminder/New law delays EITC and ACTC refunds to Feb. 15

#### Potential news releases for coming weeks:

- Phone scams -- consumer reminder
- Back-to-school reminder -- educational tax credits
- Deadline nears for work opportunity credit certification

### **National Public Liaison**

Tuesday, August 16 - Wednesday, August 17 – Information Reporting Program Advisory Committee (IRPAC) working meeting.

Tuesday, August 23 – Thursday, August 25 – IRS Nationwide Tax Forum will be held at the Gaylord National Resort & Convention Center at National Harbor, MD. The keynote address and the IRS Future State Initiative session will be delivered by Donna Hansberry, Deputy Commissioner, TEGE.

## **Legislative Affairs**

### UPCOMING MEETINGS:

NOT IRS AGENCY RECORDS



### UPCOMING HEARINGS:

Currently, there are no hearings scheduled.

## **Social Media**

- 1.) YouTube video embedded/featured on IRS.gov this week:
  - 2016 IRS Nationwide Tax Forums [https://youtu.be/2rFYcXK\\_oC0](https://youtu.be/2rFYcXK_oC0) (Aug 23 in DC, Aug 30 in Orlando, Sept 13 in San Diego)
  - (possible) IRS Tax Payment Options <https://youtu.be/SedRfC0loSE>
- 2.) IRS.gov front page - Rotating Spotlight
  - ITIN Renewal
  - Summer Tax Tips Series
  - Security Summit
  - Phishing and Tax Scams
  - Health Care & Taxes
- 3.) IRS.gov front page – News
  - [Most Truckers' Highway Use Tax Returns Due Aug. 31](#)
  - [New Phishing Scheme Targets Tax Professionals](#)
  - [Tax Pros: Protect Your Clients; Protect Yourself](#)
  - [If You Need a Retirement Account, Try myRA](#)
- 4.) Twitter (@IRSnews now has 77,489 followers, @IRStaxpros has 40,233 followers)
  - Tax Tips This week: Monday – Vacation Home Rental, Wednesday – Moving Expenses, Friday – TBOR
  - ITIN - #ITINinfo [go.usa.gov/x2Xzd](http://go.usa.gov/x2Xzd)
  - Make the #IRS Small Business and Self-Employed #tax center your first stop when starting a business. <http://go.usa.gov/xT2Fk>
  - Learn about #IRS FY 17 Security Summit initiatives; Aug. 17 webinar [go.usa.gov/x4ZUG](http://go.usa.gov/x4ZUG) #IDtheft - #CEcredit = 1 fed tax
  - File for an #IRS extension for your #taxes? The fastest way to your refund is to e-file and choose #DirectDeposit
  - Check first before you go, many #IRS offices now operate by appointment. [go.usa.gov/cwjdQ](http://go.usa.gov/cwjdQ)
  - Sign Up for #IRS Summertime #Tax Tips. <http://go.usa.gov/x3BWw>

- #2016NationwideIRSTaxForum. Register now. <http://go.usa.gov/cwye3>
- #IRS to college students: Be wary of IRS impersonators and a “federal student #tax” which does NOT exist <http://go.usa.gov/cSqHP>
- #Bigrig truckers: E-file #Form2290. <http://IRS.gov/truckers>
- “Tax Scams.” and Telephone Scams <http://go.usa.gov/3sKCK>  
<http://go.usa.gov/3vjPY> <http://go.usa.gov/3rwmn>

#### Key Tweets for Technical Communications Branch

- HCTT #65 #Employers: Learn about affordable & minimum value under the #HealthCare law. <http://go.usa.gov/xTMgT> #IRS #tax
- HCTT #63 Find valuable info on the #HealthCare law at IRS.gov & on #IRS social media. <http://go.usa.gov/x2bNR>
- #Employers & coverage providers: Webinar explains correcting information returns. <http://go.usa.gov/xaPXW>
- Recorded webinar on #employer #HealthCare ACA reporting requirements. <http://go.usa.gov/cuXPm>
- HealthCare ACA Fact Sheet - <http://go.usa.gov/cVrad>

#### FaceBook - Static FaceBook Ads - <https://www.facebook.com/IRS/>

- Health Coverage Providers
- Tax Scams
- Exempt Organization Select Check (new)
- Taxpayer Bill of Rights
- YouTube Videos

#### Tumblr.com

8/15: STT #19

Employer Tax Withholding Resp. (video)

8/16: HCTT #63

Data Theft Webinar

8/17: STT #20

IRS Commissioner Premium Tax Credit (video)

8/18: HCTT #64

Summer Weddings Tax Change

8/19: STT #21

- Safeguard Your Tax Records (wildfire pic.)

### **Visual Education and Communications**

#### Internal Programs

##### 1. SABA Sessions (Captioning):

HCO - Change Leadership Workshop (08/16)  
Informational/Training

PDB - Communications Consulting (08/16)  
Informational/Training

IT - Why Diversity and Inclusion Matters in the 21st Century (08/17)  
Audience: The audience includes all Information Technology employees (all grade levels) and managers who are located nationwide.  
Informational/Training

TEGE - Audit Hour-Workpapers (08/17)  
Audience: All IRS Employees  
Informational/Training

TEGE - Section 218 (08/18)  
Audience: All IRS Employees  
Informational/Training

TEGE - TEGE Admin CPE-IDRS Command Codes (08/18)  
Audience: All IRS Employees  
Informational/Training

OPR - Circular 230 Disciplinary Cases (08/18)  
Informational/Training

2. Other Projects: *(i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)*

Spanish YouTube Tax Tips – FCP Edit (08/15-08/16)

- Getting Married
- ASL YouTube Tax Tips – FCP Edit (08/16-08/18)
- PGLD: Re-Exporting

Criminal Investigation (CI) Fusion Center Videos - FCP (08/16-08/18)

HCO - Vision and Lifecycle - FCP (08/16-08/18)

3. Servicewide Video Editorial Board (SVEB) – Internal:

Request #483 – Appeals All-Employee Virtual Town Hall via webcast  
Target Audience: Internal, All Appeals employees, expected audience size: <1,500  
Informational/Educational messages

Request #484 – HCO Leadership Engagement Day via TV Studio webcast  
Target Audience: Internal and External. IRS and Treasury employees – informational  
All IRS executives and senior managers (Approximately 1850 participants, both in-person and remote access)  
Informational/Educational messages

External Programs

1. Videos Uploaded to IRS YouTube Channels:

- English Videos:

- Record Keeping
- Appeals Collection
- Spanish Videos:
  - Getting Married

2. Servicewide Video Editorial Board (SVEB) – External:

YT Request #120 – Virtual Service Delivery Model

Target Audience: External. Taxpayers

Informational/Educational messages

## **Communications and Liaison – Weekly Activity Report**

### **Week of August 22, 2016**

#### **Internal Communications**

##### Commissioner News

- tGen members welcome John Dalrymple for brown bag lunch (DCSE)

##### IRS Headlines

- Verify your Order Point Number by Aug. 26 (W&I)
- FEGLI Open Season begins September 1 and runs through September 30 (HCO)
- Federal long-term care premiums set to rise November 1, 2016 (HCO)
- Learn about the latest Affordable Care Act provisions (ACA)
- Retiring: Know when to expect your lump-sum annual leave payment (HCO)
- Don't fall victim to phishing scams (Multiple)

##### Leaders' Alert

- Commit to using Merit Systems Principles (HCO)
- Carefully review time and attendance records before signing (HCO)
- Seasonal managers: Remember to designate an ePerformance proxy if you're furloughed (HCO)

##### Poll questions

- What type of information can you find on the Training Policy Portal? (HCO)
- In the envisioned Future State, which theme focuses mainly on working with partners outside the IRS? (C&L)

##### Spotlight

- A walk through IRS history (Multiple)
- National Boomers Make a Difference Month (Multiple)

##### Webbie

- Apply for the Senior Executive Service Candidate Development Program, now through 9/1 (HCO)
- Partnership for Public Service ranks Best Places to Work for HR specialists (HCO)

#### **Media Relations**

##### Potential news releases possible for this week:

- Deadline for 2016 taxes is April 18, 2017
- Back-to-school reminder for education credits
- Sharing economy
- User fee changes for offers in compromise
- Mid-year check your withholding reminder/New law delays EITC and ACTC refunds to Feb. 15
- New waiver procedure for retirement plan rollovers
- National Taxpayer Advocate Wants to Hear from You: Olson to Hold Public Forum on Taxpayer Service Needs in San Antonio on Aug. 30

##### Potential releases possible for coming weeks:



- Deadline nears for work opportunity credit certification
- IRS Seeks Applications for the Advisory Committee on Tax Exempt and Government Entities

### **National Public Liaison**

Tuesday, August 30 – Thursday, September 1 – IRS Nationwide Tax Forum will be held at the Hyatt Regency Orlando in Orlando, FL. The keynote address will be delivered by Rosemary Sereti, Deputy Commissioner, LBI and the IRS Future State Initiative session will be delivered by Nicole Flax, Deputy Chief Appeals, Office of Appeals.

Wednesday, September 7 – Thursday, September 8 - Internal Revenue Service Advisory Council (IRSAC) working session. Bill Wilkins, Chief Counsel and William Paul, Deputy Chief Counsel (Technical) have agreed to come and speak to the IRSAC on Thursday, September 8..

### **Legislative Affairs**

NOT IRS AGENCY RECORDS



UPCOMING MEETINGS:

NOT IRS AGENCY RECORDS



### UPCOMING HEARINGS:

Currently, there are no hearings scheduled.

### **Social Media**

#### 1.) YouTube video embedded/featured on IRS.gov this week:

- 2016 IRS Nationwide Tax Forums [https://youtu.be/2rFYcXK\\_oC0](https://youtu.be/2rFYcXK_oC0) (Aug 30 in Orlando, Sept 13 in San Diego)
- (Monday) IRS Tax Payment Options <https://youtu.be/SedRfC0IoSE>
- (possible) Tax Scams <https://youtu.be/0y5z0kWgBcM>
- (possible) Reminders for extension filers <https://youtu.be/M3if02pPFSE>

#### 2.) IRS.gov front page - Rotating Spotlight

- ITIN Renewal
- Summer Tax Tips Series (UPDATED)
- Security Summit (UPDATED)
- Phishing and Tax Scams (UPDATED)
- Health Care & Taxes

#### 3.) IRS.gov front page – News

- [Installment Agreement Fees May Change Jan. 1](#) (new)
- [Beware of Back-to-School Tax Scams](#) (new)
- [Most Truckers' Highway Use Tax Returns Due Aug. 31](#)
- [If You Need a Retirement Account, Try myRA](#)

#### 4.) Twitter (@IRSnews now has 77,622 followers, @IRStaxpros has 40,318 followers)

- Tax Tips This week: Monday – VITA/TCE, Wednesday – Alimony, Friday – Job Hunting Expenses
- #Bigrig truckers: E-file #Form2290. Deadline is August 31. <http://IRS.gov/truckers>
- ITIN - #ITINinfo [go.usa.gov/x2Xzd](http://go.usa.gov/x2Xzd)
- Make the #IRS Small Business and Self-Employed #tax center your first stop when starting a business. <http://go.usa.gov/xT2Fk>
- Check first before you go, many #IRS offices now operate by appointment. [go.usa.gov/cwIDQ](http://go.usa.gov/cwIDQ)
- Sign Up for #IRS Summertime #Tax Tips. <http://go.usa.gov/x3BWw>

- #2016NationwideIRSTaxForum. Register now. <http://go.usa.gov/cwye3>
- #IRS to college students: Be wary of IRS impersonators and a “federal student #tax” which does NOT exist <http://go.usa.gov/cSqHP>
- “Tax Scams.” and Telephone Scams <http://go.usa.gov/3sKCK>  
<http://go.usa.gov/3vjPY> <http://go.usa.gov/3rwmn>

#### Key Tweets for Technical Communications Branch

- HCTT #65 #Employers: Learn about affordable & minimum value under the #HealthCare law. <http://go.usa.gov/xTMqT> #IRS #tax
- #Employers & coverage providers: Webinar explains correcting information returns. <http://go.usa.gov/xaPXW>
- Recorded webinar on #employer #HealthCare ACA reporting requirements. <http://go.usa.gov/cuXPm>
- #Employers: What you may need to know about the employer shared responsibility payment. <http://go.usa.gov/cJ6bh>
- You may qualify for a #HealthCare exemption based on your income. <http://go.usa.gov/cVmf4>
- HealthCare ACA Fact Sheet - <http://go.usa.gov/cVrad>

#### FaceBook - Static FaceBook Ads - <https://www.facebook.com/IRS/>

- Health Coverage Providers
- Tax Scams
- Exempt Organization Select Check (new)
- Taxpayer Bill of Rights
- YouTube Videos (updated)

### **Visual Education and Communications**

#### Internal Programs

##### 1. Video to Desk-top – Live or Recorded Events:

FY2016 Estate and Gift Tax Attorney and Paralegal CPE – Live Stream  
(08/24-08/25)

Day 1 - FY2016 Estate and Gift Tax Attorney and Paralegal CPE IVT Wednesday, August 24, 2016 12:00 – 4:15 p.m.

Day 2 - External Speaker – Honorarium FY2016 Estate and Gift Tax Attorney and Paralegal CPE IVT Thursday, August 25, 2016 12:00 – 4:15 p.m.

Topic: Estate Tax Issues, Updates & Ethics

Audience: Attorneys and Paralegals. Grade levels: Estate Tax Attorneys (GS-905, Grades 13 and 14) and Paralegals (Grades 9-11) Level of experience: 5 years to 40 years of experience Age groups, if known: Ages range from 30-75 Present level of proficiency in the subject: Most audience members have a high level of proficiency in the subject matter.

##### 2. SABA Sessions (Captioning):

EDI - RAS Refresher: IDO and Workman's Comp MOU (08/23)  
Informational/Training

TEGE - CPE- Quickbooks (08/24)  
Audience: IRS Employees  
Informational/Training

EDI - Risk Management (08/24)  
Informational/Training

PDB - Navigating Transitions: Why Am I Feeling This Way? (08/25)  
Informational/Training

EDI - Identify the Essential Job Functions (08/25)  
Informational/Training

3. Other Projects: *(i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)*

Spanish YouTube Tax Tips – FCP Edit (08/22-08/25)

- Getting Married

ASL YouTube Tax Tips – FCP Edit (08/25-08/26)

- Charitable Donations
- Getting Married
- Recordkeeping
- Employers Shared Responsibility Payment

HCO - Vision and Lifecycle - FCP (08/22-08/25)

ASL YouTube Tax Tip Taping (08/24)

External Programs

1. Videos Uploaded to IRS YouTube Channels:

- English Videos:
  - Recordkeeping
  - Charitable Contributions
- Spanish Videos:
  - Getting Married

2. Servicewide Video Editorial Board (SVEB) – External:

YT Request #121 – Foreign Tax Credit – Statutory Withholding Rate vs. Treaty Rate  
Target Audience: External. LB&I External Stakeholders  
Informational/Educational message

YT Request #122 – ASL: Tax Scams via Video Relay Service (VRS)  
W&I plans to produce an informational ASL YouTube video for deaf and hard of hearing taxpayers on *Tax Scams via Video Relay Service (VRS)*. The VEC will film, edit, caption and upload the video onto the IRS ASL YouTube Channel. Social media will coordinate the logistics and write the script. W&I would like to produce as soon as SVEB approval received.

Target Audience: External. External for deaf and hard of hearing taxpayers  
Informational/Educational message

Request #485 – W&I SPEC Grant Program Office VITA 2017 Orientation via Webcast

W&I SPEC office will hold a live 2-hour webcast (via Onstream Media) on August 29, 2016 from the SPEC HQ Summit Building, Atlanta, GA. The recording will be posted onto the IRS video portal. The event will include IRS speakers and a PowerPoint

developed by the grant staff will accompany the session. All presenters are IRS staff: Mikki Betker, Sheila Barnes, Debbie Mathews, Robin Blake, Wanda Perdue, Azell Turner, Sharon Alley and Adrienne Curtis. The webcast will cover Informational procedures for all VITA grant recipients, returning VITA grant recipients, and SPEC territory staff. If the project is not approved, a lesser quality communication via ATT Conferencing could result in decreased adherence to the grant requirements. An in-person orientation (as was previously done) would be cost-prohibitive. Target Audience: External & internal. External: All VITA grant recipients; Internal: SPEC territory staff (approx. 300)  
Informational/Educational message

## **Communications and Liaison – Weekly Activity Report**

### **Week of August 29, 2016**

#### **Internal Communications**

##### Commissioner News

- Commissioner visits New Carrollton employees 8/24 (C&L)

##### Employee Email

- EEO commissioner message (EDI)

##### IRS Headlines

- Non-pay time, such as leave without pay, can affect overtime (HCO)
- Get free help to stop smoking, lose weight, eat healthier and more (HCO)
- Get the latest information on the Affordable Care Act (ACA)
- Online training is available on codes used to identify tax cases (IT)
- Create strong passwords using Reduced SmartID Sign On (IT)
- Keep your contact information in HR Connect up to date (HCO)

##### Leaders' Alert

- Taking leave can affect your employees' eligibility for night pay differential (HCO)
- Know your responsibilities when approving requests for religious compensatory time (HCO)
- Familiarize yourself with the new time-off award policy changes (HCO)

##### Poll questions

- In 2015, which national sports league gave up its nonprofit (tax-exempt) status? (C&L)

##### Spotlight

- Choose to be happy (Multiple)

##### Webbie

- Start planning for next year's taxes (W&I)

#### **Media Relations**

##### Potential news releases for this week:

- Deadline for 2016 taxes is April 18, 2017.
- Back-to-school reminder for education credits.
- Mid-year check your withholding reminder/New law delays EITC and ACTC refunds to Feb. 15.
- For Louisiana flood victims, Hardship loans/distributions available to 401(k) participants.

##### Potential news releases for coming weeks:

- Deadline nears for work opportunity credit certification.

#### **National Public Liaison**

Tuesday, August 30 – Thursday, September 1 – IRS Nationwide Tax Forum will be held at the Hyatt Regency Orlando in Orlando, FL. The keynote address will be delivered by Rosemary Sereti, Deputy Commissioner, LBI and the IRS Future State Initiative session will be delivered Nikole Flax, Deputy Director, Appeals.

Thursday, September 8, 9:00 am – The Internal Revenue Service Advisory Council (IRSAC) will conduct its forth working session. Scheduled to address the council are Nikole Flax, Deputy Chief, Appeals and William Wilkins, Chief Counsel.

### **Legislative Affairs**

NEW MEETINGS:

NOT IRS AGENCY RECORDS



UPCOMING HEARINGS:

Currently, there are no hearings scheduled.

### **Social Media**

#### **1.) YouTube video embedded/featured on IRS.gov this week:**

- IRS Tax Payment Options <https://youtu.be/SedRfC0IoSE>
- (possible) Tax Scams <https://youtu.be/0y5z0kWgBcM>
- (possible/coordinate with National release) Reminders for extension filers <https://youtu.be/M3if02pPFSE>

## 2.) IRS.gov front page - Rotating Spotlight

- ITIN Renewal
- Exempt Orgs (NEW)
- Security Summit (UPDATED)
- Phishing and Tax Scams (UPDATED)
- Health Care & Taxes

## 3.) IRS.gov front page – News

- [Help for People Making IRA, Retirement Plan Rollovers](#) (NEW)
- [New Sharing Economy Resource Center on IRS.gov](#) (NEW)
- [Most Truckers' Highway Use Tax Returns Due Aug. 31](#) (Changing on Sept 1)
- [If You Need a Retirement Account, Try myRA](#)

## 4.) Twitter (@IRSnews now has **77,732 followers**, @IRStaxpros has **40,401 followers**)

- Tax Tips This week: **Monday** – Home Energy Tax Credits, **Wednesday** – Gambling Income and Losses
- #Bigrig truckers: E-file #Form2290. Deadline is WEDNESDAY August 31. <http://IRS.gov/truckers>
- ITIN - #ITINinfo [go.usa.gov/x2Xzd](http://go.usa.gov/x2Xzd)
- Make the #IRS Small Business and Self-Employed #tax center your first stop when starting a business. <http://go.usa.gov/xT2Fk>
- Check first before you go, many #IRS offices now operate by appointment. [go.usa.gov/cwjDQ](http://go.usa.gov/cwjDQ)
- #IRS to college students: Be wary of IRS impersonators and a “federal student #tax” which does NOT exist <http://go.usa.gov/cSqHP>
- “Tax Scams.” and Telephone Scams <http://go.usa.gov/3sKCK> <http://go.usa.gov/3vjPY> <http://go.usa.gov/3rwmn>

### **Key Tweets for Technical Communications Branch**

- HCTT #65 #Employers: Learn about affordable & minimum value under the #HealthCare law. <http://go.usa.gov/xTMqT> #IRS #tax
- HCTT # 66: It's Not Too Early to Determine Whether You Have Qualifying Coverage for ACA <http://go.usa.gov/xDAsV>

### **Top 10 ACA tweets for all Twitter accounts**

- Income & family size changes affect the premium #tax credit; tell your #Marketplace. <http://go.usa.gov/xcmYT> #IRS #HealthCare
- File your 2015 #tax return now to maintain eligibility for advance premium #tax credit payments. <http://go.usa.gov/xYdm3> #HealthCare #IRS
- #Healthcare law: You must have minimum essential coverage, qualify for an exemption, or make a payment. <http://go.usa.gov/cGAz9> #IRS #tax
- You may qualify for a #HealthCare exemption based on your income. <http://go.usa.gov/cVmf4> #IRS #tax
- #Healthcare and your #tax return: Calculating an individual shared responsibility payment. <http://go.usa.gov/ce6b4> #IRS
- #Employers & coverage providers: Webinar explains correcting information returns. <http://go.usa.gov/xaPXW> #HealthCare #IRS #tax
- #IRS Webinar for #employers: Understanding error reports for ACA info returns. <http://go.usa.gov/xDTCT> #HealthCare #tax
- #Employers: What you may need to know about the employer shared responsibility payment. <http://go.usa.gov/cJ6bh> #HealthCare #IRS #tax



- Applicable large #employers may have to make an employer shared responsibility payment. <http://go.usa.gov/cJ6bh> #HealthCare #IRS #tax
- #Employers: Find out how seasonal workers affect your workforce size under the #HealthCare law. <http://go.usa.gov/xadCY> #IRS #tax

**5.) FaceBook** - Static FaceBook Ads - <https://www.facebook.com/IRS/>

- Health Coverage Providers
- Tax Scams
- Exempt Organization Select Check (new)
- Taxpayer Bill of Rights
- YouTube Videos (updated)

**6.) Tumblr.com**

8/29: STT #25  
Form 2290

8/30: San Diego Tax Forum  
ITIN

8/31: STT #26  
HCTT #65  
Tax Scam (video)

9/1: October 15 Deadline  
Back to School

9/2: Tax Payment Options  
• HCTT #66

**Visual Education and Communications**

Internal Programs

1. SABA Sessions (Captioning):

2016 VCPE for EDI Leadership Polycom/SABA @1111 (08/30)  
Audience: All 185 employees and managers in the EDI organization, embedded EDI organizations and guest.  
Informational/Training

TAS- Spanish Letter Writing (08/30)  
Audience: All bi-lingual Taxpayer Advocate Service (TAS) employees in Case Advocacy.  
Informational/Training

TEGE - CPE-Gaming (08/31)  
Audience: All IRS Employees  
Informational/Training

EDI - Multiple Chemical Sensitivity In the Workplace (08/31)  
Informational/Training

EDI - Let's Take a Look at the RA Request Form 13661 (09/01)  
Informational/Training

2. Other Projects: (i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)

English YouTube Tax Tips – FCP Edit (08/29-09/01)

- Changed Your Name After Marriage or Divorce
- Appeals Collection

Spanish YouTube Tax Tips – FCP Edit (08/29-08/31)

- Charitable Contributions
- Record Keeping

ASL YouTube Tax Tips – FCP Edit (08/30-09/02)

- Charitable Donations
- Getting Married
- Recordkeeping
- Employers Shared Responsibility Payment

ASL YouTube Tax Tips Audio Recording (08/31)

External Programs

1. Videos Uploaded to IRS YouTube Channels:

- English Videos:
  - Appeals Collection
  - Changed Your Name After Marriage or Divorce
- Spanish Videos:
  - Getting Married

2. Servicewide Video Editorial Board (SVEB) – External:

AMENDED VR#419 – TEGE Conduit Issuers for Tax Exempt Bonds Webcast, using Audio Webcast Recording

Part 1: Conduit Issuers for Tax-exempt Financings – Overview, Part 2: Conduit Issuer Responsibilities, Part 3: Conduit Issuer Policy and Procedural Considerations  
Target Audience: Internal and External Audience. External includes: Tax Advantaged Bond Community Nationwide: Issuers of tax exempt and tax advantaged bonds, Public school district management personnel and finance staff, Attorneys with tax advantaged bond practices (e.g. bond counsel, underwriters counsel, special tax counsel), Banking industry (i.e. underwriters, financial advisors), Comptrollers/controllers/CPAs, Financial and rebate analysts, and State/local government employees. Internal audience includes: TEB field operations and compliance and program management personnel, expected audience size: 250 – 500. Informational/Educational message

# **Communications and Liaison – Weekly Activity Report**

## **Week of September 12, 2016**

### **Internal Communications**

#### Employee Email

- 2016 Federal Employee Viewpoint Survey Preliminary Results (Multiple)

#### IRS Headlines

- New guidance allows use of personal electronic devices for training (HCO)
- Watch for an email asking you to certify your location (AWSS)
- Order your 2017 tax products in accessible formats by 9/26 (W&I)
- Use the IRS Style Guide to improve your written products (C&L)
- Use SETR Mobile Work indicator effective 10/3 (HCO)

#### Highlights from Services and Enforcement

- Proactive thinking puts revenue officer safety, government interests first (DCSE)

#### Leaders' Alert

- Learn tips on communicating with those that have limited English proficiency (EDI)
- Request your employee end-of-year self-assessments (HCO)
- Don't forget to send Form 14757 to the records office when you validate separating employees in HR Connect (PGLD)
- Taking leave can affect your employees' eligibility for night pay differential (HCO)

#### Poll Question

- What's the objective of the Social Security Number Elimination and Reduction program? (PGLD)

#### Spotlight

- Remembering when your loved ones can't (Grandparents Day/World Alzheimer's Day) (Multiple)

#### Webbies

- Engaged workgroup podcast (temp title) (HCO)
- Be ready – September is National Preparedness Month (AWSS)
- Check out the Federal Employee Group Life Insurance open season website (HCO)

### **Media Relations**

#### Potential news releases possible for this week:

- Deadline for 2016 taxes is April 18, 2017
- With e-file PIN changes, be sure to keep copies of returns
- For National Preparedness Month, prepare for natural disasters
- Back-to-school reminder for education credits
- Deadline nears for work opportunity credit certification

#### Potential releases for coming weeks

- Phone scam update
- For those with extensions, reminder about Oct. 17 filing deadline

### **National Public Liaison**

Mon. Sept. 19 – Federal Bar Association Planning Meeting. Commissioner drop by at 2:15 p.m. Room 2615.

Tue. Sept. 20 and Wed. Sept. 21 – The Electronic Tax Administration Advisory Committee (ETAAC) meets for orientation at IRS Headquarters. Commissioner Koskinen meets with ETAAC on Sept. 21 from 2 p.m. – 2:30 p.m. in Room 3313.

Wed. Sept. 21 - ACA Information Returns Lessons Learned External Stakeholder Meeting with the Commissioner

### **Legislative Affairs**

NOT IRS AGENCY RECORDS



### **UPCOMING MEETINGS:**

NOT IRS AGENCY RECORDS



### **UPCOMING HEARINGS:**

Currently, there are no hearings scheduled.

### **Social Media**

- 1.) YouTube video embedded/featured on IRS.gov this week:
  - Is the IRS really calling me? <https://youtu.be/TNuVkmabc9U>
- 2.) IRS.gov front page - Rotating Spotlight
  - Phishing and Tax Scams
  - Disaster Planning (New)
  - Security Summit
  - Exempt Orgs
  - Health Care & Taxes
- 3.) IRS.gov front page – News
  - [Tax Pros: Protect Your Computers from Fraudsters](#)
  - [Now is a Good Time to Check Your Withholding](#)
  - [401\(K\) Loans Approved for Louisiana Flood Victims](#)
  - [If You Need a Retirement Account, Try myRA](#)
- 4.) Twitter (@IRSnews now has 77,975 followers, @IRStaxpros has 40,571 followers)
  - New law requires #IRS to hold refunds for some early filers next year. <http://go.usa.gov/xWpy3> #EITC
  - Check first before you go, many #IRS offices now operate by appointment. [go.usa.gov/cwjDQ](http://go.usa.gov/cwjDQ)
  - ITIN - #ITINinfo [go.usa.gov/x2Xzd](http://go.usa.gov/x2Xzd)
  - #IRS provides #tax relief to Louisiana storm victims: Various tax deadlines extended to Jan. 17, 2017 <http://go.usa.gov/xjuJw>
  - Make the #IRS Small Business and Self-Employed #tax center your first stop when starting a business. <http://go.usa.gov/xT2Fk>
  - “Tax Scams.” and Telephone Scams <http://go.usa.gov/3sKCK> <http://go.usa.gov/3vjPY> <http://go.usa.gov/3rwmn>

#### Key Tweets for Technical Communications Branch

- HCTT #68 To Maintain Eligibility for Advance Payments of the Premium Tax Credit, File ASAP <http://go.usa.gov/xZZ5A>
- HCTT #67 Changes in circumstances can affect advance payments of the premium #tax credit. <http://go.usa.gov/xWVHj>
- HCTT # 66: It's Not Too Early to Determine Whether You Have Qualifying Coverage for ACA <http://go.usa.gov/xDAsV>

#### Top 10 ACA tweets for all Twitter accounts

- Income & family size changes affect the premium #tax credit; tell your #Marketplace. <http://go.usa.gov/xcmYT> #IRS #HealthCare
- File your 2015 #tax return now to maintain eligibility for advance premium #tax credit payments. <http://go.usa.gov/xYdm3> #HealthCare #IRS
- #Healthcare law: You must have minimum essential coverage, qualify for an exemption, or make a payment. <http://go.usa.gov/cGAz9> #IRS #tax
- You may qualify for a #HealthCare exemption based on your income. <http://go.usa.gov/cVmf4> #IRS #tax
- #Healthcare and your #tax return: Calculating an individual shared responsibility payment. <http://go.usa.gov/ce6b4> #IRS
- #Employers & coverage providers: Webinar explains correcting information returns. <http://go.usa.gov/xaPXW> #HealthCare #IRS #tax
- #IRS Webinar for #employers: Understanding error reports for ACA info returns. <http://go.usa.gov/xDTCT> #HealthCare #tax

- #Employers: What you may need to know about the employer shared responsibility payment. <http://go.usa.gov/cJ6bh> #HealthCare #IRS #tax
- Applicable large #employers may have to make an employer shared responsibility payment. <http://go.usa.gov/cJ6bh> #HealthCare #IRS #tax
- #Employers: Find out how seasonal workers affect your workforce size under the #HealthCare law. <http://go.usa.gov/xadCY> #IRS #tax

5.) FaceBook - Static FaceBook Ads - <https://www.facebook.com/IRS/>

- Health Coverage Providers
- Tax Scams
- Exempt Organization Select Check
- Taxpayer Bill of Rights
- YouTube Videos (updated)
- Truckers Tax Center (New)

6.) Tumblr.com <http://internalrevenueservice.tumblr.com/>

9/12: October 15 Deadline  
San Diego Tax Forum

9/13: Choosing a Tax Preparer  
Changed your name (video)

9/14: Payment Options  
Direct Pay (video)

9/15: Direct Deposit  
HCTT #67

9/16: Beware Tax Scam on Tax pros  
HCTT #68

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## **Visual Education and Communications**

1. Video to Desk-top – Live or Recorded Events:

FY2016 Estate and Gift Tax Attorney and Paralegal CPE – Rebroadcast/Stream  
(09/14-09/15)

Rebroadcast:

Day 1 – September 14 – 12:00pm-4:15pm

Day 2 – September 15 - 12:00pm-4:15pm

Topic: Estate Tax Issues, Updates & Ethics

Audience: Attorneys and Paralegals. Grade levels: Estate Tax Attorneys (GS-905, Grades 13 and 14) and Paralegals (Grades 9-11) Level of experience: 5 years to 40 years of experience Age groups, if known: Ages range from 30-75 Present level of proficiency in the subject: Most audience members have a high level of proficiency in the subject matter.

2. SABA Sessions (Captioning):

LBI - Global Dealings Operations (GDO) CPE (09/12)

Audience: LB&I Employees

Informational/Training

TEGE - TEB Hot Topics (09/14)

Audience: IRS Employees

Informational/Training

OLS - CMS Live Forum (09/15)

Audience profile: All users are current users of the CMS. We have a variety of users at different grade levels.

Informational/Training

TEGE - TE/GE Ethics Briefing (09/16)

Audience: IRS Employees

Informational/Training

3. Other Projects: *(i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)*

Criminal Investigation Fusion Center Videos- Avid Edit (09/13-09/15)

SBSE: Completing Form 656 OIC Taping (09/13)

Topic: This video would walk users through completing the Offer in Compromise form, line by line, to clear up taxpayer confusion and expedite processing on our part.

Audience: External - all taxpayers facing Collection action that want to settle their debts.

SBSE: Employment Tax CPE Taping (09/15)

Topic: Employment Tax CPE on Tax Law Updates for Employment Tax presented by a panel of attorneys from Headquarters (Linda Mosakowski, Rebecca Wilson and Linda Azmon).

Audience: Technical employees nationwide include, Revenue Agents, Revenue Officer Examiners, Tax Examiners, Tax Compliance Officers and Program Analysts  
Grade levels of these employees range from grade 4 to grade 14.

4. Servicewide Video Editorial Board (SVEB) – Internal:

Request #490 – W&I RRP Business Rules SABA Sessions

Target Audience: Internal Audience only - 50-75 IRS employees, business analysts and WIOS/MDD employees

Informational/Educational message

External Programs

1. Videos Uploaded to IRS YouTube Channels:

- English Videos:
  - Owe But Can't Pay
  - IRS Taxes – Three Easy Ways To Pay
- Spanish Videos:
  - Recordkeeping
  - Charitable Contributions

2. Servicewide Video Editorial Board (SVEB) – External:

Request #489 – TEGE EP - Clarifying the Universal Availability and Other 403(b) Retirement Plan Requirements Webcast, using Audio Webcast  
Target Audience: External - Tax, Benefit, Pay Roll and HR Practitioners.  
Estimated audience size – 3,000  
Informational/Educational message

YT Request #123 – FATCA YouTube Video Series Updates For Release 5.0  
Target Audience: External - Informational/Educational message for LB&I External Stakeholders.  
Informational/Educational message

YT Request #124 – Annual Filing Season Program (AFSP)  
Target Audience: External – The existing video has received 108,000 views in 10 months.  
Informational/Educational message



# **Communications and Liaison – Weekly Activity Report**

## **Week of September 19, 2016**

### **Internal Communications**

#### Commissioner News

- Commissioner Koskinen conducts town halls meetings in S. California

#### Highlights from Services and Enforcement

- Cross-functional team develops new processes for insurance provider, drug prescription fees (DCSE)

#### IRS Headlines

- Suicide threats require calm, specific actions (PGLD)

#### Leaders' Alert

- Follow these simple instructions on how to be or designate an actor/proxy for TAPS/SETR (HCO)

#### Poll questions

- According to the National Taxpayer Advocate's FY 2017 Objectives Report to Congress, what percentage of the Advocate's recommendations did the IRS agree to implement from the 2015 Annual Report to Congress? (TAS)
- What was the title of our country's first constitution? (C&L)

#### Spotlight

- The power of the pen (Multiple)

#### Webbie

- Check out the newest podcast on engaged workgroups (HCO)

### **Media Relations**

#### Potential news releases for this week:

- With e-file PIN changes, be sure to keep copies of returns (will also issue Tax Tip on this few days after release goes out)
- Deadline nears for work opportunity credit certification
- For National Preparedness Month, prepare for natural disasters
- Back-to-school reminder for education credits

#### Potential news releases for coming weeks

- Deadline for 2016 taxes is April 18, 2017
- Phone scam update
- For those with extensions, reminder about Oct. 17 filing deadline

### **National Public Liaison**

Mon. Sept. 19 – Federal Bar Association Planning Meeting. Commissioner drop by at 2:15 p.m. Room 2615.

Tue. Sept. 20 and Wed. Sept. 21 – The Electronic Tax Administration Advisory Committee (ETAAC) meets for orientation at IRS Headquarters. Commissioner Koskinen meets with ETAAC on Sept. 21 from 2 p.m. – 2:30 p.m. in Room 3313.

Thu. Sept. 22, 9 a.m. – 12 noon – NPL Liaison Practitioner Meeting. Debra Holland will address practitioner representatives on changes to e-Services. Room 2140.

### **Legislative Affairs**

#### NEW HEARINGS:

On Wednesday, September 21, the House Judiciary Committee will hold a third hearing to examine the allegations of misconduct and articles of impeachment filed against Commissioner John Koskinen. The hearing is scheduled for 10:00 am in room 2237 of the Rayburn House Office Building.

Commissioner Koskinen will be the sole witness before the Committee.

#### **Social Media**

- 1.) YouTube video embedded/featured on IRS.gov this week:
  - Reminders for Extension Filers <https://youtu.be/M3if02pPFSE>
- 2.) IRS.gov front page - Rotating Spotlight
  - Phishing and Tax Scams
  - Disaster Planning
  - Security Summit
  - Exempt Orgs
  - Health Care & Taxes
- 3.) IRS.gov front page – News
  - [Tax Pros: Protect Your Computers from Fraudsters](#)
  - [Now is a Good Time to Check Your Withholding](#)
  - [401\(K\) Loans Approved for Louisiana Flood Victims](#)
  - [If You Need a Retirement Account, Try myRA](#)
- 4.) Twitter (@IRSnews now has 78,114 followers, @IRStaxpros has 40,657 followers)
  - New law requires #IRS to hold refunds for some early filers next year. <http://go.usa.gov/xWpy3> #EITC
  - Check first before you go, many #IRS offices now operate by appointment. [go.usa.gov/cwjDQ](http://go.usa.gov/cwjDQ)
  - #IRS #Whistleblower Office info on how to get cash awards for reporting suspected tax evasion. See Pub 5251 <http://go.usa.gov/xZsBG>
  - ITIN - #ITINinfo [go.usa.gov/x2Xzd](http://go.usa.gov/x2Xzd)
  - #IRS provides #tax relief to Louisiana storm victims: Various tax deadlines extended to Jan. 17, 2017 <http://go.usa.gov/xjuJw>
  - Make the #IRS Small Business and Self-Employed #tax center your first stop when starting a business. <http://go.usa.gov/xT2Fk>
  - “Tax Scams.” and Telephone Scams <http://go.usa.gov/3sKCk>  
<http://go.usa.gov/3vjPY> <http://go.usa.gov/3rwmn>

Key Tweets for Technical Communications Branch

- HCTT # 69: #Employers: How the size of your workforce affects your ACA responsibilities. <http://go.usa.gov/xKYUB>
- HCTT #68 To Maintain Eligibility for Advance Payments of the Premium Tax Credit, File ASAP <http://go.usa.gov/xZZ5A>
- HCTT #67 Changes in circumstances can affect advance payments of the premium #tax credit. <http://go.usa.gov/xWVHj>

#### Top 10 ACA tweets for all Twitter accounts

- Income & family size changes affect the premium #tax credit; tell your #Marketplace. <http://go.usa.gov/xcmYT> #IRS #HealthCare
- File your 2015 #tax return now to maintain eligibility for advance premium #tax credit payments. <http://go.usa.gov/xYdm3> #HealthCare #IRS
- #Healthcare law: You must have minimum essential coverage, qualify for an exemption, or make a payment. <http://go.usa.gov/cGAz9> #IRS #tax
- You may qualify for a #HealthCare exemption based on your income. <http://go.usa.gov/cVmf4> #IRS #tax
- #Healthcare and your #tax return: Calculating an individual shared responsibility payment. <http://go.usa.gov/ce6b4> #IRS
- #Employers & coverage providers: Webinar explains correcting information returns. <http://go.usa.gov/xaPXW> #HealthCare #IRS #tax
- #IRS Webinar for #employers: Understanding error reports for ACA info returns. <http://go.usa.gov/xDTCT> #HealthCare #tax
- #Employers: What you may need to know about the employer shared responsibility payment. <http://go.usa.gov/cJ6bh> #HealthCare #IRS #tax
- Applicable large #employers may have to make an employer shared responsibility payment. <http://go.usa.gov/cJ6bh> #HealthCare #IRS #tax
- #Employers: Find out how seasonal workers affect your workforce size under the #HealthCare law. <http://go.usa.gov/xadCY> #IRS #tax

#### 5.) FaceBook - Static FaceBook Ads - <https://www.facebook.com/IRS/>

- Health Coverage Providers
- Tax Scams
- Exempt Organization Select Check
- Taxpayer Bill of Rights
- YouTube Videos
- Truckers Tax Center

### **Visual Education and Communications**

#### Internal Programs

##### 1. SABA Sessions (Captioning):

HCO - HCO Ethics Town Hall (09/20)

Audience: The audience for these two sessions is all employees of the Human Capital Organization. This includes employees in PODs all across the country. The total population is around 1,600 employees, therefore we are proposing two separate sections, so that we can have anywhere from 800 to 1,000 participants in either session.

Informational/Training

IT - LBS - The Secret is in the Sauce (09/20)

Informational/Training

HCO - Open Forum: Environmental Awareness/Risk Management (09/21)  
Informational/Training

TEGE - TEGE Admin CPE-Excel Basic (09/22)  
Audience: IRS Employees  
Informational/Training

2. Other Projects: (i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)

ASL YouTube Tax Tips – FCP Edit (09/22)

- Civil Rights Video

Criminal Investigation Fusion Center Videos- Avid Edit (09/19-09/22)

ASL YouTube Tax Tips Taping (09/21)

English YouTube Taping @1111 (09/21)

Spanish YouTube Taping @1111 (09/22)

3. Servicewide Video Editorial Board (SVEB) – Internal:

Request #491 – AD Nationwide Town Hall – November 3, 2016  
Target Audience: Internal Audience - IRS Employees from Applications Development (AD). Approximate audience size is 1,950 employees nationwide.  
Informational/Educational message Target Audience

Request #492 – W&I Field Assistance FY17 CPE for Managers via Live meeting  
Target Audience: Internal Audience - Field Assistance Managers nationwide, approximately 32 maximum attendees per LiveMeeting session (approximately 190 managers).  
Informational/Educational message

Request #493 – IT-EOps-Demand Management & Project Governance Division All Hands Meetings via OCS/Lync  
Target Audience: Internal Audience - IRS employees  
Informational/Educational message

Request #486 – CI National Forensic Lab (NFL) Videos (total of 4 videos)  
Target Audience: Internal training for CI employees  
Informational/Educational message

#### External Programs

1. Videos Uploaded to IRS YouTube Channels:

- Spanish Videos:
  - Recordkeeping
  - Charitable Contributions

2. Servicewide Video Editorial Board (SVEB) – External:

YT Request #123 – FATCA YouTube Video Series Updates For Release 5.0

Target Audience: External - Informational/Educational message for LB&I External Stakeholders

Informational/Educational message

YT Request #124 – Annual Filing Season Program (AFSP)

Target Audience: External – The existing video has received 108,000 views in 10 months

Informational/Educational message

## **Communications and Liaison – Weekly Activity Report**

### **Week of September 26, 2016**

#### **Internal Communications**

##### Employee Email

- Making progress toward IRS Future State with your help (Comm)

##### Highlights from Services and Enforcement

- Land in wine-growing regions may be deductible (DCSE)

##### IRS Headlines

- View new Self-Help Online Tutorial on proper use of personal email accounts for official business (PGLD)
- Remember the Hatch Act rules when you're on social media (HCO)
- Apply to participate in the IRS Veterans Mentoring Program (HCO)

##### Leaders' Alert

- Fiscal year 2017 procurement acquisition due dates are here (Procurement)
- Only mark the "Final T&A" and "End Day" SETR fields when an employee separates (HCO)
- Take advantage of the October Managers CPE offerings October 13 and 26 (HCO)
- Know the difference between reworking and revalidating ratings in ePerformance (HCO)

##### Poll questions

- Which IRWeb feature highlights employees who go the extra mile to achieve the IRS mission and serve the nation's taxpayers (C&L)
- How many Future State Bridge Projects have completed? (Multiple)

##### Spotlight

- My dream and my dad's name live on (National Hispanic Heritage Month) (EDI)
- Who's been your best IRS teacher? (World Teacher Day) (Multiple)

##### Webbie

- Federal Employee Group Life Insurance open season ends 9/30 (HCO)

#### **Media Relations**

##### Potential news releases possible for this week:

- Deadline for 2016 taxes is April 18, 2017
- For National Preparedness Month, prepare for natural disasters
- Back-to-school reminder for education credits

##### Potential releases possible for coming weeks

- Phone scam update
- For those with extensions, reminder about Oct. 17 filing deadline

#### **National Public Liaison**

PSRM Branch is processing 36 applications for membership to the Information Reporting Program Advisory Committee and 54 applications after a second solicitation for the Electronic Tax Administration Advisory Committee.

#### **Legislative Affairs**

#### UPCOMING MEETINGS:

On Thursday, September 29, 2016, Commissioner John Koskinen will meet with Congressman Robert Dold for a courtesy meeting to discuss a few topics relating to their phone discussion back in July. Congressman Dold serves on the House Ways and Means Committee and two of its Subcommittees. The meeting is scheduled for 4:30 pm in room 221 of the Cannon House Office Building.

#### UPCOMING HEARINGS:

Currently, there are no hearings scheduled.

#### **Social Media**

1.) YouTube video embedded/featured on IRS.gov this week:

- Reminders for Extension Filers <https://youtu.be/M3if02pPFSE>
- How To Use Get Transcript Online <https://youtu.be/pASG585PM5A> (possible)

2.) IRS.gov front page - Rotating Spotlight

- Phishing and Tax Scams
- Disaster Planning
- Security Summit
- Exempt Orgs
- Health Care & Taxes

3.) IRS.gov front page – News

- [Work Opportunity Credit Deadline Sept. 28](#) (Replace this at deadline)
- [Reminder: October 17 extension deadline](#)
- [Now is a Good Time to Check Your Withholding](#)
- [If You Need a Retirement Account, Try myRA](#)

4.) Twitter (@IRSnews now has 78,272 followers < +158 from last week>, @IRStaxpros has 40,748 followers < +91 >)

- New law requires #IRS to hold refunds for some early filers next year. <http://go.usa.gov/xWpy3> #EITC
- Check first before you go, many #IRS offices now operate by appointment. [go.usa.gov/cwjDQ](http://go.usa.gov/cwjDQ)
- ITIN - #ITINinfo [go.usa.gov/x2Xzd](http://go.usa.gov/x2Xzd)
- #IRS provides #tax relief to Louisiana storm victims: Various tax deadlines extended to Jan. 17, 2017 <http://go.usa.gov/xjuJw>

- Make the #IRS Small Business and Self-Employed #tax center your first stop when starting a business. <http://go.usa.gov/xT2Fk>
- “Tax Scams.” and Telephone Scams <http://go.usa.gov/3sKCk>  
<http://go.usa.gov/3vjPY> <http://go.usa.gov/3rwmn>

#### Key Tweets for Technical Communications Branch

- HCTT # 69: #Employers: How the size of your workforce affects your ACA responsibilities. <http://go.usa.gov/xKYUB>
- HCTT #68 To Maintain Eligibility for Advance Payments of the Premium Tax Credit, File ASAP <http://go.usa.gov/xZZ5A>

#### Top 10 ACA tweets for all Twitter accounts

- Income & family size changes affect the premium #tax credit; tell your #Marketplace. <http://go.usa.gov/xcmYT> #IRS #HealthCare
- File your 2015 #tax return now to maintain eligibility for advance premium #tax credit payments. <http://go.usa.gov/xYdm3> #HealthCare #IRS
- #Healthcare law: You must have minimum essential coverage, qualify for an exemption, or make a payment. <http://go.usa.gov/cGAz9> #IRS #tax
- You may qualify for a #HealthCare exemption based on your income. <http://go.usa.gov/cVmf4> #IRS #tax
- #Healthcare and your #tax return: Calculating an individual shared responsibility payment. <http://go.usa.gov/ce6b4> #IRS
- #Employers & coverage providers: Webinar explains correcting information returns. <http://go.usa.gov/xaPXW> #HealthCare #IRS #tax
- #IRS Webinar for #employers: Understanding error reports for ACA info returns. <http://go.usa.gov/xDTCT> #HealthCare #tax
- #Employers: What you may need to know about the employer shared responsibility payment. <http://go.usa.gov/cJ6bh> #HealthCare #IRS #tax
- Applicable large #employers may have to make an employer shared responsibility payment. <http://go.usa.gov/cJ6bh> #HealthCare #IRS #tax
- #Employers: Find out how seasonal workers affect your workforce size under the #HealthCare law. <http://go.usa.gov/xadCY> #IRS #tax

#### 5.) FaceBook - Static FaceBook Ads - <https://www.facebook.com/IRS/>

- Health Coverage Providers
- Tax Scams
- Exempt Organization Select Check
- Taxpayer Bill of Rights
- YouTube Videos
- Truckers Tax Center
- Contact your Local IRS office (NEW)

#### 6.) Tumbler - <http://internalrevenueservice.tumblr.com/>

9/26: HCTT #70

9/27: Direct Deposit

Beware of Tax Pro scam

9/29: October 18 Deadline

Credits & Deductions

9/30: Sharing Economy

Reminders for Extension Filers (video)



## **Visual Education and Communications**

### Internal Programs

#### 1. SABA Sessions (Captioning):

HCO Focus Day FY16-HCO Embracing Change (09/27)  
Informational/Training

TEGE - Lunch & Learn: Documenting Plan Qualification (09/27)  
Audience: IRS Employees  
Informational/Training

IT - IT Managers Technical Learning Program in Learn and Lead 24x7 (09/28)  
Audience: The audience includes all levels of IT Management.  
Informational/Training

TEGE - Audit Hour - Backup Withholding (09/28)  
Audience: IRS Employees  
Informational/Training

TEGE - FSLG Fraud (09/29)  
Audience: IRS Employees  
Informational/Training

#### 2. Other Projects: (i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)

ASL YouTube Tax Tips – FCP Edit (09/27-09/30)

- IRS Taxes: Three Easy Ways To Pay
- Changed Your Name After Marriage or Divorce
- Owe Taxes But Can't Pay
- Protecting Deaf Taxpayer Civil rights

English YouTube Tax Tips – FCP Edit (09/26-09/30)

- Refund: Claim It or Lose It
- IRS Taxes: Three Easy Ways To Pay
- Owe Taxes But Can't Pay

Spanish YouTube Tax Tips – FCP Edit (09/26-09/29)

- Getting Married
- Changed Your Name After Marriage or Divorce

ASL YouTube Tax Tips Taping – Audio Recording (09/28)

#### 3. Servicewide Video Editorial Board (SVEB) – Internal:

Request #494 – TEGE OE - IRC 501(c)(3)-Proposing Denial Audio Webcast  
Target Audience: Both External and Internal audience (IRS employees, tax practitioner community and tax-exempt organizations)  
Informational/Educational message

Request #495 – TEGE OE When Are Commercial-Type Activities a Substantial Nonexempt Purpose for an IRC 501(c)(3) Organization? Audio Webcast

Target Audience: Both External and Internal audience (IRS employees, tax practitioner community and tax-exempt organizations)  
Informational/Educational message

## External Programs

### 1. Videos Uploaded to IRS YouTube Channels:

- ASL Videos:
  - Recordkeeping
  - Charitable Contributions
- English Videos:
  - IRS Taxes: Three Easy Ways To Pay
  - Owe Taxes But Can't Pay
- Spanish Videos (Pending Release):
  - Getting Married
  - Changed Your Name After Marriage or Divorce
  - Owe Taxes But Can't Pay
  - IRS Taxes: Three Easy Ways To Pay

### 2. Servicewide Video Editorial Board (SVEB) – External:

Request #496 – TEGE ACA Outreach for State and Local Governmental Employer  
Community Audio Webcast

Target Audience: External - Government Entities  
Informational/Educational message

Request #497 – W&I SPEC 2016 VITA/TCE National Site Coordinator Training  
Webcasts (total of 2)

Target Audience: External - IRS VITA & TCE partners and site coordinators  
Estimated attendance size: 1,000 (live), 5,000 to view recorded session.  
Informational/Educational message

# **Communications and Liaison – Weekly Activity Report**

## **Week of October 3, 2016**

### **Internal Communications**

#### Commissioner News

- Commissioner Koskinen looks ahead at OCA luncheon celebration (Comm)

#### Employee email

- Making progress toward IRS Future State with your help (Comm)

#### Headlines

- Performance appraisals are required when applying for IRS jobs (HCO)
- Protect yourself against the flu with a free vaccination (HCO)

#### Highlights from Services and Enforcement

- EITC soft notice encourages voluntary compliance through education (DCSE)

#### Leaders' Alert

- You must comply with EEO investigations (EDI)
- Update information in ePerformance if employees held more than one position (HCO)
- Remind your employees of Hatch Act prohibitions (HCO)
- Tools available for writing performance commitments (HCO)
- Don't modify workplace security features without approval (AWSS)

#### Poll Question

- Is it a UNAX violation if an IRS employee checks for a posted payment on a taxpayer's account in response to a taxpayer inquiry after the case is closed? (PGLD)

#### Spotlight

- Your decisions drive your safety (Drive Safely Work Week) (Multiple)

#### Update on Key Agency Projects

- IRS 2016 tax forums complete successful run from Chicago to San Diego (C&L)

### **Media Relations**

#### Potential news releases for this week:

- IRS now accepting ITIN renewal applications
- For those with extensions, reminder about Oct. 17 filing deadline

#### Potential releases for coming weeks

- Deadline for 2016 taxes is April 18, 2017
- Phone scam update

### **National Public Liaison**

- Monthly Payroll Industry Call – 10/6 @ 1:30
- Tues. Oct. 4, 3 p.m. – NPL briefing for Terry on IRPAC candidates.

### **Legislative Affairs**

Not IRS Agency Records



## UPCOMING HEARINGS:

Currently, there are no hearings scheduled.

## **Social Media**

1.) YouTube video embedded/featured on IRS.gov this week:

- Reminders for Extension Filers <https://youtu.be/M3if02pPFSE>

2.) IRS.gov front page - Rotating Spotlight

- Phishing and Tax Scams
- Disaster Planning (May get replaced with a Tax Tips or ITIN spotlight later this week/month)
- Security Summit
- Exempt Orgs
- Health Care & Taxes

3.) IRS.gov front page – News

- You May Need to Renew Your ITIN (NEW)
- Reminder: October 17 extension deadline
- Now is a Good Time to Check Your Withholding
- If You Need a Retirement Account, Try myRA
- To replace “Withholding” Monday... Drought-Stricken Farmers and Ranchers Have More Time to Replace Livestock; 37 States and Puerto Rico Affected

4.) Twitter (@IRSnews now has 78,272 followers < +152 from last week>, @IRStaxpros has 40,748 followers < +121 >)

- ITIN - #ITINinfo [go.usa.gov/x2Xzd](http://go.usa.gov/x2Xzd)
- New law requires #IRS to hold refunds for some early filers next year. <http://go.usa.gov/xWpy3> #EITC
- Check first before you go, many #IRS offices now operate by appointment. [go.usa.gov/cwjDQ](http://go.usa.gov/cwjDQ)
- #IRS provides #tax relief to Louisiana storm victims: Various tax deadlines extended to Jan. 17, 2017 <http://go.usa.gov/xjuJw>
- Make the #IRS Small Business and Self-Employed #tax center your first stop when starting a business. <http://go.usa.gov/xT2Fk>
- “Tax Scams.” and Telephone Scams <http://go.usa.gov/3sKCk>  
<http://go.usa.gov/3vjPY> <http://go.usa.gov/3rwmn>

### Key Tweets for Technical Communications Branch

- HCTT # 70: Has your income or family size changed? Report life changes to your Marketplace. <http://go.usa.gov/xKtEn>

- HCTT #71 Access ACA info reporting presentations on the #IRS website anytime. <http://go.usa.gov/xKtVvk>

#### Top 10 ACA tweets for all Twitter accounts

- Income & family size changes affect the premium #tax credit; tell your #Marketplace. <http://go.usa.gov/xcmYT> #IRS #HealthCare
- File your 2015 #tax return now to maintain eligibility for advance premium #tax credit payments. <http://go.usa.gov/xYdm3> #HealthCare #IRS
- #Healthcare law: You must have minimum essential coverage, qualify for an exemption, or make a payment. <http://go.usa.gov/cGAz9> #IRS #tax
- You may qualify for a #HealthCare exemption based on your income. <http://go.usa.gov/cVmf4> #IRS #tax
- #Healthcare and your #tax return: Calculating an individual shared responsibility payment. <http://go.usa.gov/ce6b4> #IRS
- #Employers & coverage providers: Webinar explains correcting information returns. <http://go.usa.gov/xaPXW> #HealthCare #IRS #tax
- #IRS Webinar for #employers: Understanding error reports for ACA info returns. <http://go.usa.gov/xDTCT> #HealthCare #tax
- #Employers: What you may need to know about the employer shared responsibility payment. <http://go.usa.gov/cJ6bh> #HealthCare #IRS #tax
- Applicable large #employers may have to make an employer shared responsibility payment. <http://go.usa.gov/cJ6bh> #HealthCare #IRS #tax
- #Employers: Find out how seasonal workers affect your workforce size under the #HealthCare law. <http://go.usa.gov/xadCY> #IRS #tax

#### 5.) FaceBook - Static FaceBook Ads - <https://www.facebook.com/IRS/>

- Health Coverage Providers
- Tax Scams
- Exempt Organization Select Check
- Taxpayer Bill of Rights
- YouTube Videos
- Truckers Tax Center
- Contact your Local IRS office (NEW)

### **Visual Education and Communications**

#### Internal Programs

##### 1. Video to Desk-top – Live or Recorded Events:

HCO Leadership Engagement Day @1111– Polycom/Stream (10/05)

Topic: IRS and Treasury speakers presenting information and leading a discussion on gathering feedback and input for incorporation into the FY17 Leadership Engagement Action Plan.

Audience: Internal and Treasury – informational. All IRS executives and senior managers (Approximately 1850 participants, both in-person and remote access)

Attendee Estimates by session: 10-11:30AM All IRS Executives = 246 approx. (estimate 100 in person) 12:00-1:30PM All IRS Senior Managers = 1600 approx. (estimate 100 in person)

##### 2. Other Projects: *(i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)*

ASL YouTube Tax Tips – FCP Edit (10/05)

- IRS Taxes: Three Easy Ways To Pay
  - Changed Your Name After Marriage or Divorce
  - Owe Taxes But Can't Pay
  - Protecting Deaf Taxpayer Civil rights
- English YouTube Tax Tips – FCP Edit (10/04-10/07)

- Appeals Collection
  - Getting Married
  - Owe Taxes But Can't Pay
  - April 18 Is The Tax Deadline For 2017
- Spanish YouTube Tax Tips – FCP Edit (10/03-10/07)
- Owe Taxes But Can't Pay
  - Changed Your Name After Marriage or Divorce

Criminal Investigation (CI) Swiss Bank Taping @1111 (10/04)

### 3. Servicewide Video Editorial Board (SVEB) – Internal:

Request #491 – AD Nationwide Town Hall – November 3, 2016

Target Audience: Internal Audience - IRS employees and contractors from Applications Development (AD), approximate audience size is 1,950 employees nationwide  
Informational message for employees and contractors

### External Programs

#### 1. Videos Uploaded to IRS YouTube Channels:

- ASL Videos:
  - Changed Your Name After Marriage or Divorce
- English Videos:
  - Appeals Collection
  - Getting Married
  - Owe Taxes But Can't Pay
- Spanish Videos (Pending Release):
  - Getting Married
  - Changed Your Name After Marriage or Divorce
  - Owe Taxes But Can't Pay
  - IRS Taxes: Three Easy Ways To Pay

#### 2. Servicewide Video Editorial Board (SVEB) – External:

YT Request #123 – FATCA YouTube Video Series Updates For Release 5.0

Target Audience: External - Informational/Educational message for LB&I External Stakeholders  
Informational/educational message

YT Request #125 – Keep a Copy of Your Tax Return

Target Audience: External - All taxpayers, millions of them who use e-file and who do not have an e-file PIN that they obtained prior to the tool becoming unavailable  
Informational/educational message

## **Communications and Liaison – Weekly Activity Report**

### **Week of October 11, 2016**

#### **Internal Communications**

##### Commissioner News

- Commissioner Koskinen looks ahead at Office of Compliance Analytics (OCA) luncheon celebration (C&L)

##### IRS Headlines

- Know what to do if your direct deposit is late (HCO)
- “Show Some Love” through the 2016 Combined Federal Campaign (AWSS)
- 2016 FEVS results show we improved in 68 of 71 questions asked (HCO)
- Security and Privacy is everyone’s responsibility (Multiple)

##### Highlights from Services and Enforcement

- IRS eBooks grow to 99 publications and Form 1040 instructions (DCSE)

##### Leaders’ Alert

- Don’t modify workplace security features without approval (AWSS)
- Create customized employee reports using the Human Resources Reporting Center (HCO)
- Review additional Time-Off Special Act and Manager Awards guidance (HCO)
- You play a key role informing employees about physical security (Security Awareness Month) (AWSS)

##### Other News

- IRS wins award for transforming taxpayers’ online experiences (C&L)

##### Poll Question

- When did IRS introduce the Form 1040X (RAAS)
- How many virtual and in-person town halls and others meetings has Commissioner Koskinen held with employees and managers? (C&L)

##### Spotlight

- Happy Boss’s Day from all of us (C&L)

##### Daily News (webbies)

- Need help filling out a reasonable accommodation request form? (EDI)
- Find answers to your questions on performance awards (HCO)

#### **Media Relations**

##### Potential news releases for this week:

- Hurricane Matthew relief

##### Potential releases for coming weeks

- Inflation-adjusted pension plan limits for 2017
- 2017 tax rates and tax benefits adjusted for inflation
- Plan now to take advantage of healthcare FSA benefits in 2017
- Deadline for 2016 taxes is April 18, 2017
- Phone scam update

#### **National Public Liaison**

## **Legislative Affairs**

### UPCOMING MEETINGS:

Not IRS Agency Records



### UPCOMING HEARINGS:

Currently, there are no hearings scheduled.

## **Social Media**

- 1.) YouTube video embedded/featured on IRS.gov this week:
  - Reminders for Extension Filers <https://youtu.be/M3if02pPFSE>
- 2.) IRS.gov front page - Rotating Spotlight
  - Phishing and Tax Scams
  - Disaster Planning
  - Security Summit
  - Exempt Orgs
  - Health Care & Taxes
- 3.) IRS.gov front page – News
  - [You May Need to Renew Your ITIN](#)
  - [Reminder: October 17 extension deadline](#)
  - [Tax Relief for Farmers and Ranchers Affected by Drought](#)
  - [If You Need a Retirement Account, Try myRA](#)
- 4.) Twitter (@IRSnews now has 78,581 followers < +309 from last week>, @IRStaxpros has 40,958 followers < +210 >)
  - ITIN - #ITINinfo [go.usa.gov/x2Xzd](http://go.usa.gov/x2Xzd)
  - New law requires #IRS to hold refunds for some early filers next year. <http://go.usa.gov/xWpy3> #EITC
  - Check first before you go, many #IRS offices now operate by appointment. [go.usa.gov/cwJDQ](http://go.usa.gov/cwJDQ)
  - “Tax Scams.” and Telephone Scams <http://go.usa.gov/3sKCk> <http://go.usa.gov/3vjPY> <http://go.usa.gov/3rwmn>

Key Tweets for Technical Communications Branch



- HCTT # 70: Has your income or family size changed? Report life changes to your Marketplace. <http://go.usa.gov/xKtEn>
- HCTT #71 Access ACA info reporting presentations on the #IRS website anytime. <http://go.usa.gov/xKtV/k>
- HCTT #72: #HealthCare: ACA and Employers: Terms to Know about Offers of Health Coverage. #IRS #tax <http://go.usa.gov/xkY89>

#### Top 10 ACA tweets for all Twitter accounts

- Income & family size changes affect the premium #tax credit; tell your #Marketplace. <http://go.usa.gov/xcmYT> #IRS #HealthCare
- File your 2015 #tax return now to maintain eligibility for advance premium #tax credit payments. <http://go.usa.gov/xYdm3> #HealthCare #IRS
- #Healthcare law: You must have minimum essential coverage, qualify for an exemption, or make a payment. <http://go.usa.gov/cGAz9> #IRS #tax
- You may qualify for a #HealthCare exemption based on your income. <http://go.usa.gov/cVmf4> #IRS #tax
- #Healthcare and your #tax return: Calculating an individual shared responsibility payment. <http://go.usa.gov/ce6b4> #IRS
- #Employers & coverage providers: Webinar explains correcting information returns. <http://go.usa.gov/xaPXW> #HealthCare #IRS #tax
- #IRS Webinar for #employers: Understanding error reports for ACA info returns. <http://go.usa.gov/xDTCT> #HealthCare #tax
- #Employers: What you may need to know about the employer shared responsibility payment. <http://go.usa.gov/cJ6bh> #HealthCare #IRS #tax
- Applicable large #employers may have to make an employer shared responsibility payment. <http://go.usa.gov/cJ6bh> #HealthCare #IRS #tax
- #Employers: Find out how seasonal workers affect your workforce size under the #HealthCare law. <http://go.usa.gov/xadCY> #IRS #tax

#### 5.) FaceBook - Static FaceBook Ads - <https://www.facebook.com/IRS/>

- Health Coverage Providers
- Tax Scams
- Exempt Organization Select Check
- Taxpayer Bill of Rights
- YouTube Videos
- Truckers Tax Center
- Contact your Local IRS office (NEW)

### **Visual Education and Communications**

#### Internal Programs

##### 1. SABA Sessions (Captioning):

IT - LBS - Learning Behavior Session: Relationship Management (10/11)  
Informational/Training

EDI - Social Networking Research for Compliance Purpose 7114 Mtg. (10/11)  
Informational/Training

LBI - Disability Awareness (10/11)  
Audience: LB&I Employees and Managers  
Informational/Training

EDI - Let's Take a Look at the RA Request Form 13661 (10/12)

Audience: IRS managers/employees from all the business units and located in various PODs around the country.

Informational/Training

HCO - Coaching Employees through Strategic Changes: The Leadership Coaching Model (10/13)

Informational/Training

IT/HCO - IT Connections Hour: Own Your Career (10/03)

Audience: The audience is Information Technology employees (all grade levels) and managers who are located nationwide.

2. Other Projects: *(i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)*

English YouTube Tax Tips – FCP Edit (10/11-10/14)

- April 18 Is The Tax Deadline For 2017

Spanish YouTube Tax Tips – FCP Edit (10/11-10/12)

- IRS Taxes – Three Easy Ways to Pay
- Getting Married

External Programs

1. Videos Uploaded to IRS YouTube Channels:

- ASL Videos:
  - IRS Taxes: Three Easy Ways to Pay
  - Protecting Deaf Taxpayer Civil Rights
- English Videos:
  - Getting Married

2. Servicewide Video Editorial Board (SVEB) – External:

YT Request #123 – FATCA YouTube Video Series Updates For Release 5.0

Target Audience: External. Informational/Educational message for LB&I External Stakeholders

Informational/educational message

YT Request #126 – W&I Health Coverage Tax Credit YouTube video

Target Audience: External – taxpayers

Informational/Educational message

Request #499 –W&I Health Coverage Tax Credit Webinar

Target Audience: External, Approximately 400 HCTC Partners (DOL, PBGC, tax pros)

Informational/educational message

Request #500 – IT AD Corporate Data Town Hall - Mindset Video (Failure Is Not an Option)

Target Audience: External/Internal. IT AD Corporate Data Domain employees (IRS Employees)

Informational/educational message

## **Communications and Liaison – Weekly Activity Report**

### **Week of October 17, 2016**

#### **Internal Communications**

##### Commissioner News

- Department of Justice recognizes IRS employees for outstanding contributions (C&L)

##### Employee Email

- Making progress toward IRS Future State with your help (Comm)

##### Highlights from Services and Enforcement

- Taxpayers envision their future online experiences (DCSE)

##### IRS Headlines

- Talking politics: Know what the Hatch Act permits and prohibits (HCO)
- Contractors: Take your mandatory security briefing by Oct. 31 or lose access (IT)
- Order fiscal year 2017 shipping supplies now (W&I)

##### Leaders' Alert

- Review your employees' telework agreements (HCO)

##### Poll questions

- When I'm teleworking, may I send an IRS work document to my personal email account to print on my home computer? (PGLD)

##### Spotlight

- Learning differences (Dyslexia Awareness Month) (C&L)

##### Webbie

- If you see something – say something (Security Awareness Month) (AWSS)

#### **Media Relations**

##### Potential news releases for this week:

- Business e-file up this year
- Additional Hurricane Matthew relief
- Inflation-adjusted pension plan limits for 2017
- 2017 tax rates and tax benefits adjusted for inflation
- 2016 Tax Forums now available online

##### Potential releases for coming weeks

- Deadline for 2016 taxes is April 18, 2017
- Plan now to take advantage of healthcare FSA benefits in 2017
- Phone scam update

#### **National Public Liaison**

Tue. Oct. 25, 1-1:30 p.m. – IRPAC Chair Michael Gangwer (Vanguard) and Vice Chair Keith King (Bank of America) meet Commissioner Koskinen a day ahead of the Information Reporting Program Advisory Committee public meeting. Room 3300.

Wed. Oct. 26, 9-10:30 a.m. – Commissioner Koskinen attends Information Reporting Program Advisory Committee (IRPAC) public meeting. Melrose Georgetown Hotel, 2430 Pennsylvania Ave., NW, Washington, D.C.

## **Legislative Affairs**

Not IRS Agency Records



### UPCOMING HEARINGS:

Currently, there are no hearings scheduled.

### **Social Media**

1.) YouTube video embedded/featured on IRS.gov this week:

- Reminders for Extension Filers <https://youtu.be/M3if02pPFSE> (change Monday night)
- IRS Taxes-Three Easy Ways to Pay <https://youtu.be/VuLL7-0MCAg>

2.) IRS.gov front page - Rotating Spotlight

- October 17 Deadline (change Monday night)
- Phone and Other Tax Scams
- Disaster Planning
- Exempt Orgs
- Health Care & Taxes

3.) IRS.gov front page – News

- [You May Need to Renew Your ITIN](#)
- [Es posible que tenga que renovar su ITIN](#)
- [Tax Relief for Farmers and Ranchers Affected by Drought](#)
- [If You Need a Retirement Account, Try myRA](#)

4.) Twitter (@IRSnews now has 78,698 followers < +117 from last week>, @IRStaxpros has 41,035 followers < +77 >)

- #HurricaneMatthew victims qualify for #tax relief; #IRS Updated county info <http://go.usa.gov/xkVm>
- ITIN - #ITINinfo [go.usa.gov/x2Xzd](http://go.usa.gov/x2Xzd)
- New law requires #IRS to hold refunds for some early filers next year. <http://go.usa.gov/xWpy3> #EITC
- Check first before you go, many #IRS offices now operate by appointment. [go.usa.gov/cwJDQ](http://go.usa.gov/cwJDQ)
- "Tax Scams." and Telephone Scams <http://go.usa.gov/3sKCK>  
<http://go.usa.gov/3vjPY> <http://go.usa.gov/3rwmn>

#### Key Tweets for Technical Communications Branch

- HCTT #71 Access ACA info reporting presentations on the #IRS website anytime. <http://go.usa.gov/xKtVv>
- HCTT #72: #HealthCare: ACA and Employers: Terms to Know about Offers of Health Coverage. #IRS #tax <http://go.usa.gov/xkY89>

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- #Healthcare law: You must have minimum essential coverage, qualify for an exemption, or make a payment. <http://go.usa.gov/cGAz9> #IRS #tax
- You may qualify for a #HealthCare exemption based on your income. <http://go.usa.gov/cVmf4> #IRS #tax
- #Healthcare and your #tax return: Calculating an individual shared responsibility payment. <http://go.usa.gov/ce6b4> #IRS
- #Employers & coverage providers: Webinar explains correcting information returns. <http://go.usa.gov/xaPXW> #HealthCare #IRS #tax
- #IRS Webinar for #employers: Understanding error reports for ACA info returns. <http://go.usa.gov/xDTCT> #HealthCare #tax
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- Applicable large #employers may have to make an employer shared responsibility payment. <http://go.usa.gov/cJ6bh> #HealthCare #IRS #tax
- #Employers: Find out how seasonal workers affect your workforce size under the #HealthCare law. <http://go.usa.gov/xadCY> #IRS #tax

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- Exempt Organization Select Check
- Taxpayer Bill of Rights
- YouTube Videos
- Truckers Tax Center
- Contact your Local IRS office
- ITIN Info (NEW)
- Información sobre ITIN (NEW)

6.) Tumblr - <http://internalrevenueservice.tumblr.com/>

- 10/17: October 17 Deadline  
3 Easy Ways to Pay (video)
- 10/18: Sharing Economy  
Tax Relief for Hurricane Mathew Victims
- 10/19: Beware Tax Scams  
HCTT #71
- 10/20: Charitable Contributions (video)  
Get Connected with IRS Social Media
- 10/21: HCTT #72
- Beware Fake Charities

## **Visual Education and Communications**

### **Internal Programs**

1. SABA Sessions (Captioning):

TEGE - Individual Training Needs Assessment (10/18)  
Audience: IRS Employees  
Informational/Training

LB&I - Transfer Pricing Notice of Proposed Adjustment (NOPA) Best Practices (10/20-10/21)  
Audience: LB&I Employees  
Informational/Training

Innovation Seminar-Future State (10/20)  
Informational/Training

Bridging Communications 2 (10/21)  
Audience: Vast variety of communicators throughout the Service  
Informational/Training

2. Other Projects: (*i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.*)

English YouTube Tax Tips – FCP Edit (10/18-10/21)

- HCO Executive Engagement Series Videos

Spanish YouTube Tax Tips – FCP Edit (10/17-10/20)

- IRS Taxes – Owe Taxes But Can't Pay
- Getting Married

Avid Edit – Criminal Investigation (CI) Swiss Bank Video (10/17-10/20)

### **External Programs**

1. Videos Uploaded to IRS YouTube Channels:

- English Videos:
  - Appeals Collection

- April 18 is When Your Taxes Are Due in 2017

# **Communications and Liaison – Weekly Activity Report**

## **Week of October 24, 2016**

### **Internal Communications**

#### Commissioner News

- Department of Justice recognizes IRS employees for outstanding contributions (C&L)

#### IRS Headlines

- Election Day is November 8 (HCO)
- We're moving forward with the IRS Phased Retirement program (HCO)
- Can you display political momentos in the workplace? (HCO)
- Use self-service to unlock your own SETR account (HCO)

#### Leaders' Alert

- Employee awards or high-level recognition may be denied for misconduct (HCO)
- Ensure your contractors complete required training before Nov. 1 (Multiple)
- Your employees may be eligible for a retroactive PTSP reimbursement (pending approval) (AWSS)

#### Poll questions

- According to the IRS Style Guide, how should the months of the year be written? (C&L)
- Which of the following is NOT a reason the Hatch Act was implemented? (HCO)

#### Spotlight

- A tale of two sites (National Go on a Field Trip Month) (Multiple)

#### Webbie

- Business units conduct training for employee development (HCO)
- Reminder: Help the IRS's space-planning efforts by self-certifying your work location (AWSS)
- Gina Garza wins FedScoop 50 Leadership Award (IT)

### **Media Relations**

#### Potential news releases for this week:

- Business e-file up this year
- Inflation-adjusted pension plan limits for 2017
- 2017 tax rates and tax benefits adjusted for inflation
- Deadline for 2016 taxes is April 18, 2017
- W-2 Employer Deadline

#### Potential releases for coming weeks

- Security Summit Update
- Plan now to take advantage of healthcare FSA benefits in 2017
- Phone scam update

### **National Public Liaison**

Small Business Forum – November 1 @ National Federation of Independent Business, Washington DC

- Topics include: ACA and Collection Updates



- Agenda includes: IRS Commissioner John Koskinen and C&L Director Terry Lemons

## **Legislative Affairs**

Not IRS Agency Records



### UPCOMING HEARINGS:

Currently, there are no hearings scheduled.

## **Social Media**

1.) YouTube video embedded/featured on IRS.gov this week:

- IRS Taxes-Three Easy Ways to Pay <https://youtu.be/VuLL7-0MCAg>
- Changed Your Name After Marriage or Divorce? <https://youtu.be/l82uvzBGTNk>

2.) IRS.gov front page - Rotating Spotlight

- ITIN Renewals
- Phone and Other Tax Scams
- Disaster Planning
- Exempt Orgs
- Health Care & Taxes

3.) IRS.gov front page – News

- [Sign Up Now to Become a VITA Volunteer](#)
- [Hurricane Matthew tax relief expanded](#)
- [Tax Credits for Education Can Help Offset Costs](#)
- [If You Need a Retirement Account, Try myRA](#)

4.) Twitter (@IRSnews now has 78,858 followers < +160 from last week>, @IRStaxpros has 41,161 followers < +126 >)

- #HurricaneMatthew victims qualify for #tax relief; #IRS Updated county info <http://go.usa.gov/xkVm>
- ITIN - #ITINinfo [go.usa.gov/x2Xzd](http://go.usa.gov/x2Xzd)
- New law requires #IRS to hold refunds for some early filers next year. <http://go.usa.gov/xWpy3> #EITC

- Check first before you go, many #IRS offices now operate by appointment. [go.usa.gov/cwJDQ](http://go.usa.gov/cwJDQ)
- “Tax Scams.” and Telephone Scams <http://go.usa.gov/3sKCk>  
<http://go.usa.gov/3vjPY> <http://go.usa.gov/3rwmn>

#### Key Tweets for Technical Communications Branch

- HCTT #74 IRS.gov has info you need to understand the #HealthCare law’s effect on your #taxes. <http://go.usa.gov/xkvYH>
- HCTT #73 File your 2015 federal #tax return by the 10/17 extension deadline - double check your #HealthCare info. <http://go.usa.gov/xky8j>
- HCTT #72: #HealthCare: ACA and Employers: Terms to Know about Offers of Health Coverage. #IRS #tax <http://go.usa.gov/xkY89>
- HCTT #71 Access ACA info reporting presentations on the #IRS website anytime. <http://go.usa.gov/xKtVk>

#### Top 10 ACA tweets for all Twitter accounts

- Income & family size changes affect the premium #tax credit; tell your #Marketplace. <http://go.usa.gov/xcmYT> #IRS #HealthCare
- File your 2015 #tax return now to maintain eligibility for advance premium #tax credit payments. <http://go.usa.gov/xYdm3> #HealthCare #IRS
- #Healthcare law: You must have minimum essential coverage, qualify for an exemption, or make a payment. <http://go.usa.gov/cGAz9> #IRS #tax
- You may qualify for a #HealthCare exemption based on your income. <http://go.usa.gov/cVmf4> #IRS #tax
- #Healthcare and your #tax return: Calculating an individual shared responsibility payment. <http://go.usa.gov/ce6b4> #IRS
- #Employers & coverage providers: Webinar explains correcting information returns. <http://go.usa.gov/xaPXW> #HealthCare #IRS #tax
- #IRS Webinar for #employers: Understanding error reports for ACA info returns. <http://go.usa.gov/xDTCT> #HealthCare #tax
- #Employers: What you may need to know about the employer shared responsibility payment. <http://go.usa.gov/cJ6bh> #HealthCare #IRS #tax
- Applicable large #employers may have to make an employer shared responsibility payment. <http://go.usa.gov/cJ6bh> #HealthCare #IRS #tax
- #Employers: Find out how seasonal workers affect your workforce size under the #HealthCare law. <http://go.usa.gov/xadCY> #IRS #tax

#### 5.) FaceBook - Static FaceBook Ads - <https://www.facebook.com/IRS/>

- Health Coverage Providers
- Tax Scams
- Exempt Organization Select Check
- Taxpayer Bill of Rights
- YouTube Videos
- Truckers Tax Center
- Contact your Local IRS office
- ITIN Info (NEW)
- Información sobre ITIN (NEW)

#### 6.) Tumblr - <http://internalrevenueservice.tumblr.com/>

10/24: VITA/TCE Volunteer, Sharing Economy  
10/25: ITIN, Check you Withholding (video)  
10/26: VITA/TCE Volunteer, Online Tax Forums

10/27: E-Filing Employment Tax Returns, Charitable Contributions (video)  
10/28: VITA/TCE Volunteer, HCTT #74

## **Visual Education and Communications**

### **Internal Programs**

#### 1. SABA Sessions (Captioning):

TEGE - Individual Training Needs Assessment (10/18)  
Audience: IRS Employees  
Informational/Training

LB&I - Transfer Pricing Notice of Proposed Adjustment (NOPA) Best Practices  
(10/20-10/21)  
Audience: LB&I Employees  
Informational/Training

Innovation Seminar-Future State (10/20)  
Informational/Training

Bridging Communications 2 (10/21)  
Audience: Vast variety of communicators throughout the Service  
Informational/Training

#### 2. Other Projects: *(i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)*

English YouTube Tax Tips – FCP Edit (10/18-10/21)  
• HCO Executive Engagement Series Videos  
Spanish YouTube Tax Tips – FCP Edit (10/17-10/20)  
• IRS Taxes – Owe Taxes But Can't Pay  
• Getting Married

Avid Edit – Criminal Investigation (CI) Swiss Bank Video (10/17-10/20)

### **External Programs**

#### 1. Videos Uploaded to IRS YouTube Channels:

- English Videos:
  - Appeals Collection
  - April 18 is When Your Taxes Are Due in 2017

# **Communications and Liaison – Weekly Activity Report**

## **Week of October 31, 2016**

### **Internal Communications**

#### Headlines

- Election Day is November 8 (HCO)
- IRS to pay 2016 performance awards and bonuses soon (HCO)
- Prevent UNAX: Check out resources, reporting process (Security Awareness Month) (PGLD)
- Get ready for health benefits open season, November 14 – December 12 (AWSS)
- Resources help you protect privacy and records (Security Awareness Month) (PGLD)

#### Leaders' Alert

- Ensure employees receive pay for the correct amount of holiday hours (HCO)
- Understanding internal controls and what they mean to you and your team (CFO)
- Use Managers CPE to prepare for Future State changes (HCO)
- Recognize your retiring employee with these resources available on iManage (HCO)
- Determine if your separating employee is transferring to another agency (HCO)

#### Poll Question

- Have you set up your SETR security questions to unlock your own SETR account? (HCO)
- How many commissioner-level organizations does the IRS have? (C&L)

#### Spotlight

- Ancestor's mansion inspires legend (TEGE)
- Keeping our heritage alive (American Indian and Alaska Native Heritage Month) (W&I)

#### Update on Key Agency Projects

- You can help prevent phishing and system fraud (IT)

#### Other News

- Department of Justice obtains indictment on 56 individuals, five companies for multimillion-dollar phone scam (C&L)

#### Webbie

- IRS must hold refunds for tax returns claiming EITC or ACTC until 2/15 (W&I)

### **Media Relations**

#### Potential news releases for this week:

- Security Summit Update
- Tax Scams Update

#### Potential releases for coming weeks

- Plan now to take advantage of healthcare FSA benefits in 2017
- EITC Refund Delays
- Tax Preparedness Series begins

### **National Public Liaison**

BSRM Branch

- Tues. Nov. 1 - Small Business Forum @ National Federation of Independent Business, Washington DC  
Topics include: ACA and Collection Updates
- Weds. Nov. 2 - Reporting Agent Forum @ 1111 Constitution  
Agenda includes: IRS Commissioner John Koskinen and C&L Director Terry Lemons

#### PSRM Branch

- Weds. Nov. 9, 1 p.m. – Outreach Leadership Monthly Call.
- Tues. Nov. 15, 2 p.m. – Tax Talk Today. “Exam to Appeals: Helping Clients with Post-Return Issues.”

#### **Legislative Affairs**

Not IRS Agency Records



#### UPCOMING HEARINGS:

Currently, there are no hearings scheduled.

## **Social Media**

- 1.) YouTube video embedded/featured on IRS.gov this week:
  - Changed Your Name After Marriage or Divorce? <https://youtu.be/l82uvzBGTNk>
- 2.) IRS.gov front page - Rotating Spotlight
  - ITIN Renewals
  - Phone and Other Tax Scams
  - Disaster Planning
  - Exempt Orgs
  - Health Care & Taxes
- 3.) IRS.gov front page – News
  - [Jan. 31 W-2 Filing Deadline for Employers](#)
  - [Sign Up Now to Become a VITA Volunteer](#)
  - [401\(K\) Loans Approved for Hurricane Matthew Victims](#)
  - [If You Need a Retirement Account, Try myRA](#)
- 4.) Twitter (@IRSnews now has 79,011 followers < +153 from last week>, @IRStaxpros has 41,250 followers < +89 >)
  - ITIN - #ITINinfo [go.usa.gov/x2Xzd](http://go.usa.gov/x2Xzd)
  - New law requires #IRS to hold refunds for some early filers next year. <http://go.usa.gov/xWpy3> #EITC
  - As #IRS combats #IDtheft and tax refund fraud, some legitimate refunds will be delayed <http://go.usa.gov/xWpy3>
  - #IRS seeks #tax prep volunteers. Get involved. Help others prepare tax returns this year. <http://go.usa.gov/DSK9>
  - Check first before you go, many #IRS offices now operate by appointment. [go.usa.gov/cwJDQ](http://go.usa.gov/cwJDQ)
  - “Tax Scams.” and Telephone Scams <http://go.usa.gov/3sKCK> <http://go.usa.gov/3vjPY> <http://go.usa.gov/3rwmn>
  - Open season for #PTIN applications and renewals ends Dec. 31. Renew or register now. <http://go.usa.gov/xkwBE>
  - Register now for #IRS webinar, “Backup Withholding: Nov 10 @ 2 pm ET. <http://go.usa.gov/xKzZ7>
- 5.) FaceBook - Static FaceBook Ads - <https://www.facebook.com/IRS/>
  - Health Coverage Providers
  - Tax Scams
  - Exempt Organization Select Check
  - Taxpayer Bill of Rights
  - YouTube Videos
  - Truckers Tax Center
  - Contact your Local IRS office
  - ITIN Info
  - Información sobre ITIN

- 6.) Tumblr - <http://internalrevenueservice.tumblr.com/>

10/31: VITA Volunteer, National Veterans Small Business Week

11/1: ITIN , Phone Scam

11/2: PTIN Renewals, Online Tax Forums

11/3: Security Summit: Update your password regularly (video), Visiting a TAC  
11/4: Hurricane Mathew Relief, Charitable Donations (video)

## **Visual Education and Communications**

### Internal Programs

#### 1. Video to Desk-top – Live or Recorded Events:

Applications Development Town Hall Meeting – Polycom/Onstream (11/03)

Topic: This is a live webcast (via Onstream Media) in the format of a town hall that will be closed captioned (via Onstream). Topics to be covered: employee recognition and organization accomplishments and vision. The speakers will include: Nancy Sieger, ACIO, Applications Development, Rob Ragano, Deputy ACIO, Applications Development and AD Domain Directors.

Audience: Audience will consist of a full NCFB auditorium as well as attendees located in Detroit, Austin, Martinsburg, Farmers Branch, Austin, and Ogden PODs as well as various remote locations throughout the agency.

#### 2. SABA Sessions (Captioning):

IT - FS17 ChM/KISAM Enhancement Training (11/01)

Audience: The participants in this training session are all IRS IT and Non-IT users of the KISAM Service Manager Change Management Module. Job titles and grades vary from Management Analysts, IT Specialists, Program & Project Management up to and possibly including Director level or higher. Locations of the participants are widespread, and the current knowledge base ranges from new IRS employee to experienced user of the KISAM tool.

Informational/Training

HCO - Leadership Engagement Day for Frontline Managers (11/01)

Audience: open to all IRS Managers

Informational/Training

TEGE - Arbitrage Updates (11/01)

Audience profile: IRS Employees

Informational/Training

LB&I - Alternative Minimum Tax Foreign Tax Credit Law and Application (11/02)

Audience: LB&I Employees

Informational/Training

#### 3. Other Projects: (i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)

English YouTube Tax Tips – FCP Edit (11/01-11/02)

- Tax Return Errors

Avid Edit - Criminal Investigation (CI) Swiss Bank Video (10/31-11/03)

Avid Edit - HCO Executive Engagement Series Videos (11/01)

#### 4. Servicewide Video Editorial Board (SVEB) – Internal:

Request #504 – IT EOPS Town Hall Meeting – December 15, 2016  
Target Audience: Internal - All Employees Meetings (~1800), plus EOps contractors  
(some of whom don't have IRS accounts)  
Informational/Educational message

#### External Programs

1. Videos Uploaded to IRS YouTube Channels:

- English Videos:
  - Tax Return Errors

2. Servicewide Video Editorial Board (SVEB) – External:

YT Request #127 – IRS Sharing Economy Resource Center

Target Audience: External. Taxpayers who participate in the sharing economy  
Informational/Educational message

YT Request #128 – 60 Day Rollover Waiver

Target Audience: External - Taxpayers with IRAs and employer-sponsored retirement plans who leave jobs and maybe faced with the 60-day rollover requirement. Expected audience size is same as that for most IRS YouTube videos.  
Informational/Educational message

Request #505 – Employee Plans Compliance Resolution System Changes (Revenue Procedure 2016-51)

Target Audience: External. Tax, Benefit, Pay Roll and HR Practitioners  
Informational/Educational message

#### TIGTA Reports this week:

- Tomorrow: TIGTA: 201530016: Important Improvements Have Been Made in the Offer in Compromise Process; However, Additional Efficiencies Can Be Gained



# **Communications and Liaison – Weekly Activity Report**

## **Week of November 7, 2016**

### **Internal Communications**

#### Headlines

- Volunteer to prepare taxes for those in need (W&I)
- Get conference call, Live meeting tips (IT)
- Learn about the standards and methods IRS uses in providing protection (AWSS)
- Employee Personal Page enhances security features (AWSS)
- Tell us what you think about the Elements of Training e-newsletter (HCO)

#### Leaders' Alert

- Support now available to process separating employee IT equipment return (IT)
- Find no-cost training resources in the Elements of Training e-newsletter (HCO)
- Discuss the Fair and Equitable Treatment of Taxpayers Retention Standard with your employees (HCO)
- Now available: New Status of IRS Operations Decision Table (HCO)

#### Poll Question

- Which President introduced payroll deduction as an option for the Combined Federal Campaign (CFC)? (Comm)

#### Spotlight

- Honoring those who support and defend (Veterans Day) (Multiple)

#### Webbie

- Honor all who served; send a Veterans Day eCard (HCO)

### **Media Relations**

#### Potential news releases for this week:

- Tax Preparedness Series Begins—Special Tax Breaks for the Armed Forces

#### Potential releases for coming weeks

- Plan now to take advantage of healthcare FSA benefits in 2017
- EITC Refund Delays

### **National Public Liaison**

#### Tax Forums Branch

- Wed. Nov. 16 - The IRSAC Public Meeting is scheduled to be held at the Melrose Georgetown Hotel. Commissioner Koskinen, Debra Holland, W&I Commissioner; Michael Damasiewicz, Assistant Director, Examination; Steve Whitlock, Director OPR; and Doug O'Donnell, LBI Commissioner are scheduled to attend.

#### PSRM Branch

- Mon. Nov. 14 – Weds. Nov. 16 – AICPA National Tax Conference. Various IRS executives to speak and IRS to demo taxpayer account in exhibit hall. Marriott Wardman Park.

#### BSRM Branch

- Mon. Nov. 14 – Tues. Nov. 15 – National Association of Tax Professionals will be meeting with top IRS leadership including IRS Commissioner Koskinen, RPO Director Carol Campbell and OPR Director Steve Whitlock. The purpose of the meetings will be to discuss issues relevant to NATP such as Future State and Information Security.

### **Legislative Affairs**

Not IRS Agency Records



#### **UPCOMING HEARINGS:**

Currently, there are no hearings scheduled.

### **Social Media**

- 1.) YouTube video embedded/featured on IRS.gov this week:
  - Military Tax Tips <https://youtu.be/L7zwBKuU0YQ>
- 2.) IRS.gov front page - Rotating Spotlight
  - Security Summit

- Phone and Other Tax Scams
- Disaster Planning
- Exempt Orgs
- Health Care & Taxes

3.) IRS.gov front page – News

- Jan. 31 W-2 Filing Deadline for Employers
- Sign Up Now to Become a VITA Volunteer
- DOJ Indictments on Phone Scams
- If You Need a Retirement Account, Try myRA

4.) Twitter (@IRSnews now has 79,172 followers < +161 from last week>, @IRStaxpros has 41,336 followers < +86 >)

- ITIN - #ITINinfo [go.usa.gov/x2Xzd](http://go.usa.gov/x2Xzd)
- New law requires #IRS to hold refunds for some early filers next year. <http://go.usa.gov/xWpy3> #EITC
- Want to report a sketchy #tax preparer? This #IRS video gives more insight. <http://go.usa.gov/cs8Vk>
- HCTT #76 - #Employers & software developers: ACA Assurance Testing for AIR begins Nov. 7. <http://go.usa.gov/xke7K>
- As #IRS combats #IDtheft and tax refund fraud, some legitimate refunds will be delayed <http://go.usa.gov/xWpy3>
- #IRS seeks #tax prep volunteers. Get involved. Help others prepare tax returns this year. <http://go.usa.gov/DSK9>
- Check first before you go, many #IRS offices now operate by appointment. [go.usa.gov/cwJDQ](http://go.usa.gov/cwJDQ)
- “Tax Scams.” and Telephone Scams <http://go.usa.gov/3sKCk> <http://go.usa.gov/3vjPY> <http://go.usa.gov/3rwmn>
- Open season for #PTIN applications and renewals ends Dec. 31. Renew or register now. <http://go.usa.gov/xkwBE>
- Register now for #IRS webinar, “Backup Withholding: Nov 10 @ 2 pm ET. <http://go.usa.gov/xKzZ7>

5.) FaceBook - Static FaceBook Ads - <https://www.facebook.com/IRS/>

- Health Coverage Providers
- Tax Scams
- Exempt Organization Select Check
- Taxpayer Bill of Rights
- YouTube Videos
- Truckers Tax Center
- Contact your Local IRS office
- ITIN Info
- Información sobre ITIN

6.) Tumblr - <http://internalrevenueservice.tumblr.com/>

11/7: HCTT #75, VITA/TCE Volunteer

11/8: ITIN Renewal, Getting married? (video)

11/9: Sharing Economy, HCTT #76

11/10: Military Tax Tips (video), Tax Benefits for military

**Visual Education and Communications**

## Internal Programs

### 1. Video to Desk-top – Live or Recorded Events:

#### Appeals IVT – Live Stream (11/09)

Topic: Appeals organizations structural realignment, as this program takes place 6 days after it is enacted. The executives of the four new executive areas will introduce themselves to their new charges. The Chief and Deputy Chief will discuss the 2016 year-end letter and the 2017 Appeals Program Letter and the associated goals.

Q&A.

Audience: Office of Appeals employees.

### 2. SABA Sessions (Captioning):

#### HCO - Leadership Engagement Day for Frontline Managers (11/07, 11/10)

Audience: All service-wide managers

Informational/Training

#### LB&I - FATCA Overview (11/08)

Audience: LB&I Employees

Informational/Training

#### TEGE - Changes to EPCRS - Revenue Procedure 2016-51 (11/08)

Audience profile: IRS Employees

Informational/Training

#### IT - FS2017 ChM/KISAM Enhancement Training (11/10)

Informational/Training

#### HCO - Leading from a Distance: The Art of Remote Management (11/10)

Audience: All service-wide managers

Informational/Training

#### LB&I - FATCA Reason to Know Presumption (11/10)

Audience: LB&I Employees

Informational/Training

### 3. Other Projects: (*i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.*)

#### English YouTube Tax Tips – FCP Edit (11/07-11/10)

- Tax Return Errors
  - Making an Appointment for IRS Tax Help
- #### Spanish YouTube Tax Tips (Pending) – FCP Edit (11/07-11/10)
- April 18 Deadline
  - Direct Deposit (TB sent updated email re: graphics)
  - Refund: Claim it or Lose it

#### Avid Edit - Criminal Investigation (CI) Swiss Bank Video (11/07-11/10)

## External Programs

### 1. Videos Uploaded to IRS YouTube Channels:

- English Videos:
  - Tax Return Errors
- Spanish Videos (Pending Approval):
  - Getting Married
  - Owe Taxes But Can't Pay
  - IRS Taxes – Three Easy Ways To Pay
  - Making An Appointment

### **TIGTA/GAO**

Tuesday 11/8

- TIGTA Report: 201520017: Improvements Are Needed for Information Technology Contract Administration Controls to Mitigate Risks
- TIGTA Report: 201530022: As the Use of Virtual Currencies in Taxable Transactions Become More Common, Additional Actions Are Needed to Ensure Taxpayer Compliance

# **Communications and Liaison – Weekly Activity Report**

## **Week of November 14, 2016**

### **Internal Communications**

#### Headlines

- Update your address to receive your W-2 on time (HCO)
- AT&T Calling Card deactivation begins December 1 (IT)
- Status of IRS Operations Decision Table gives guidance on office closures, other emergencies (HCO)
- Federal benefits season open now through December 12 (HCO)
- Schedule your use-or-lose annual leave (HCO)
- Report incidents and threats toward employees and the workplace (AWSS)

#### Leaders' Alert

- New toolkit provides everything you need to know about administering IRS email policy (PGLD)
- Commissioner grants two hours of holiday leave (HCO)
- Your employees may be eligible for a retroactive Public Transportation Subsidy Program reimbursement (AWSS)
- Establish a performance plan for any employee assigned to your group for 60 days or more (HCO)

#### Poll Question

- What is the inscription on the IRS building at 1111 Constitution Ave. in Washington, D.C.? (RAAS)
- What's the objective of the Social Security Number Elimination and Reduction program? (PGLD)

#### Spotlight

- 'Tis the season to de-stress (Multiple)

#### Webbie

- You may be eligible for a retroactive Public Transportation Subsidy Program reimbursement (AWSS)
- Learn how Skillsoft training resources can enhance your career (HCO)

### **Media Relations**

### **National Public Liaison**

#### BSRM Branch

AICPA National Tax Conference, Marriott Wardman Park.

- Mon. Nov. 14 – Tues. Nov. 15 – IRS demos taxpayer account, AICPA Exhibit Hall.
- Tue. Nov. 15, 10:20-11:10 am – Commissioner Koskinen addresses AICPA National Tax Conference.
- Weds. Nov. 16, 1:45-2:45 pm – Deputy Commissioner Dalrymple meets with AICPA leadership team. Marriott Wardman Park.

Thurs. Nov. 17, 2016 – NPL November Practitioner Meeting. Agenda includes updates from ACA and Legislative Affairs and presentations on ITIN CAA program and crowdfunding. Room 2140.

#### Liaison/Tax Forums Branch

- Wed. Nov. 16 - The IRSAC Public Meeting is scheduled to be held at the Melrose Georgetown Hotel. Commissioner Koskinen, Debra Holland, W&I Commissioner; Michael Damasiewicz, Assistant Director, Examination; Steve Whitlock, Director OPR; and Doug O'Donnell, LBI Commissioner are scheduled to attend.

### **Legislative Affairs**

Not IRS Agency Records



#### UPCOMING HEARINGS:

Currently, there are no hearings scheduled.

### **Social Media**

1.) YouTube video embedded/featured on IRS.gov this week:

- Charitable Contributions <https://youtu.be/j9HdpVISMJc>

2.) IRS.gov front page - Rotating Spotlight

- Security Summit
- Phone and Other Tax Scams
- Disaster Planning
  - “Get Ready” for Tax Season (NEW, replacing Disaster Planning)

- Exempt Orgs
- Health Care & Taxes

### 3.) IRS.gov front page – News

- [Preparing for 2017: Military Tax Tips](#)
- [Jan. 31 W-2 Filing Deadline for Employers](#)
- [Sign Up Now to Become a VITA Volunteer](#)
- [If You Need a Retirement Account, Try myRA](#)

### 4.) Twitter (@IRSnews now has 79,373 followers < +201 from last week>, @IRStaxpros has 41,418 followers < +82 >)

- ITIN - #ITINinfo [go.usa.gov/x2Xzd](http://go.usa.gov/x2Xzd)
- New law requires #IRS to hold refunds for some early filers next year. <http://go.usa.gov/xWpy3> #EITC
- Want to report a sketchy #tax preparer? This #IRS video gives more insight. <http://go.usa.gov/cs8Vk>
- HCTT #76 - #Employers & software developers: ACA Assurance Testing for AIR begins Nov. 7. <http://go.usa.gov/xke7K>
- As #IRS combats #IDtheft and tax refund fraud, some legitimate refunds will be delayed <http://go.usa.gov/xWpy3>
- #IRS seeks #tax prep volunteers. Get involved. Help others prepare tax returns this year. <http://go.usa.gov/DSK9>
- Check first before you go, many #IRS offices now operate by appointment. [go.usa.gov/cwIDQ](http://go.usa.gov/cwIDQ)
- “Tax Scams.” and Telephone Scams <http://go.usa.gov/3sKCK> <http://go.usa.gov/3vjPY> <http://go.usa.gov/3rwmn>
- Open season for #PTIN applications and renewals ends Dec. 31. Renew or register now. <http://go.usa.gov/xkwBE>

### 5.) FaceBook - Static FaceBook Ads - <https://www.facebook.com/IRS/>

- Health Coverage Providers
- Tax Scams
- Exempt Organization Select Check
- Taxpayer Bill of Rights
- YouTube Videos
- Truckers Tax Center
- Contact your Local IRS office
- ITIN Info
- Información sobre ITIN

### 6.) Tumblr - <http://internalrevenueservice.tumblr.com/>

11/14: VITA Volunteer, Sharing economy

11/15: Charitable Contributions (video), Tuesday Tax Reminder

11/16: Online Tax Forum, Three Easy Ways to Pay (video)

11/17: ITIN, Credits and Deductions

11/18: Beware of phone scam, Visiting a TAC

## **Visual Education and Communications**

### Internal Programs

#### 1. SABA Sessions (Captioning):



IT - LBS 5 Dysfunctions of a Team (11/15)  
Informational/Training

LB&I - FATCA IGA (11/15)  
Audience: LB&I Employees  
Informational/Training

LBI - Hostile Work Environment (11/15)  
Audience: LB&I Employees and Managers  
Informational/Training

TEGE - 7114 meeting for Policy Statement on Fairness (11/15)  
Audience: IRS Employees  
Informational/Training

IT - Custodial Accounting: Why it is important and what does it mean to IRS?  
(11/16)  
Audience: This will be an audience of high graded GS-12 and above IT and  
CFO employees who can benefit from a walk-through of the systems. We will  
also cover other historic and lessons learned during the creation of these  
systems, processes, and relationships with the stakeholders that interact and  
depend on these systems.  
Informational/Training

LB&I - FATCA QI-WP-WT (11/16)  
Audience: LB&I Employees  
Informational/Training

TEGE - Audit Hour - EOE Lead Sheets (11/16)  
Audience: IRS Employees  
Informational/Training

HCO - HCO 2016 Virtual Recognition Ceremony – SABA/Polycom (11/17)  
Audience: HCO Community  
Informational/Training

TEGE - FSLG - Section 530 Provisions (11/17)  
Audience: IRS Employees  
Informational/Training

IT - 2016 IT Federal Employee Viewpoint Survey (FEVS). Empowering  
Employees, Inspiring Change (11/17)  
Audience: The audience is Information Technology employees (all grade  
levels) and managers who are located nationwide.  
Informational/Training

TEGE - FSLG - Auditing for Backup Withholding (11/17)  
Audience: IRS Employees  
Informational/Training

HCO - Leadership Engagement Day for Frontline Managers (11/18)  
Audience: All IRS Managers  
Informational/Training

2. Other Projects: *(i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)*

ASL YouTube Tax Tips – FCP Edit (11/17-11/18)

- Tax Return Errors- Tips to Avoid them
- April 18 is When Your Taxes are Due in 2017
- Making an Appointment for IRS Tax Help
- Refund: Claim It or Lose It!
- Direct Deposit for Your Tax Refund

Spanish YouTube Tax Tips – FCP Edit (11/14-11/17)

- Getting Married
- April 18 is When Your Taxes are Due in 2017
- Making An Appointment
- Refund: Claim It or Lose It

SBSE ITIN Podcast- Audio Recording (11/15)

Topic: The audio podcast will cover the ITIN program changes for 2017.

Audience: External-- Taxpayers and Tax Professionals

ASL YouTube Tax Tips Taping (11/16)

3. Servicewide Video Editorial Board (SVEB) – Internal:

Request #506 – RAAS Virtual Meeting via Webstream

Target Audience: Internal: RAAS employees consisting of about 300 employees.

Informational/Training

Request #507 – IT UNS Town Hall via Webcast Nov. 29, 2016

Target Audience: Internal: UNS employees and contractors.

Informational/Training

Request #508 – TAS – State of TAS Town Hall via Webcast on Dec. 6, 2016

Target Audience: Internal: TAS employees

Informational/Training

External Programs

1. Videos Uploaded to IRS YouTube Channels:

- ASL Videos:
  - Getting Married
- English Videos:
  - IRS Taxes: Three Easy Ways To Pay
  - Owe Taxes But Can't Pay

- Spanish Videos:
  - Direct Deposit (Pending Approval)

2. Servicewide Video Editorial Board (SVEB) – External:

AMENDED Request #478 – TEGE Indian Tribes and the Collection Process Webinar, using Audio Webcast

Target Audience: External, Indian Tribal Governments and casino operators and executives

Informational/Educational Message

AMENDED Request #419 –TEGE Conduit Issuers for Tax Exempt Bonds Webcast, Using Audio Webcast Recording

Target Audience: The presentations are principally intended as outreach for external audience. Internal (IRS) participation is welcome but not required.

External audience: Tax Advantaged Bond Community Nationwide: Issuers of tax exempt and tax advantaged bonds, Public school district management personnel and finance staff, Attorneys with tax advantaged bond practices (e.g. bond counsel, underwriters counsel, special tax counsel), Banking industry (i.e. underwriters, financial advisors), Comptrollers/controllers/CPAs, Financial and rebate analysts, and State/local government employees.

Internal audience: TEB field operations and compliance and program management personnel. Expected audience size: 250 – 500 +

Informational/Educational Message

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**TIGTA/GAO**

No reports announced.

# **Communications and Liaison – Weekly Activity Report**

## **Week of November 21, 2016**

### **Internal Communications**

#### **Commissioner News**

- Wreath-laying ceremony honors veterans and their families (DCSE/DCOS)

#### **Headlines**

- Reset your HR Connect password with the self-service reset feature (HCO)
- Records Radar: Whom to contact for records management help (PGLD)
- Commissioner Koskinen grants two hours of holiday leave (HCO)
- Bargaining unit employees will receive 2016 performance awards on November 23 (HCO)
- IRS delivers record-breaking donations for 2016 Feds Feed Families campaign (AWSS)

#### **Leaders' Alert**

- Apply for professional liability insurance reimbursement (HCO)
- Schedule sign language interpreters, Communication Access Real-Time Translation (CART) writers for work activities, holiday events (EDI)

#### **Poll Question**

- Which level of evaluation captures feedback from training participants about three to six months after training? (HCO)

#### **Spotlight**

- Healthy holiday feasts (Multiple)

#### **Webbie**

- Be prepared for earthquakes while at work (AWSS)
- SharePoint 2013 upgrade: Production environment expected spring 2017 (IT)
- Review your Statement of Earnings and Leave for accuracy (AWSS)

### **Media Relations**

Potential news releases for this week:

- Tax preparedness series continues—sharing economy
- Holiday Refund Reminder

Potential releases for coming weeks

- Plan now to take advantage of healthcare FSA benefits in 2017
  - Saver's Credit reminder
- Incarceration exclusion reminder

### **National Public Liaison**

## Legislative Affairs

Not IRS Agency Records



### UPCOMING HEARINGS:

Currently, there are no hearings scheduled.

### Social Media

#### 1.) YouTube video embedded/featured on IRS.gov this week:

- Get Transcript – Plan Ahead <https://youtu.be/k34ZzgsM01c>

#### 2.) IRS.gov front page - Rotating Spotlight

- “Get Ready” for 2017
- Security Summit
- Phone and Other Tax Scams
- Exempt Orgs
- Health Care & Taxes

#### 3.) IRS.gov front page – News

- [Preparing for 2017: Avoid Refund Delays](#)
  - Note: each Tax Preparedness Tax Tip will post here
- [Jan. 31 W-2 Filing Deadline for Employers](#)
- [Sign Up Now to Become a VITA Volunteer](#)
- [If You Need a Retirement Account, Try myRA](#)

#### 4.) Twitter (@IRSnews now has 79,592 followers < +219 from last week>, @IRStaxpros has 41,551 followers < +133 >)

- Get Ready Campaign – [www.irs.gov/GetReady](http://www.irs.gov/GetReady)
- ITIN - #ITINinfo [go.usa.gov/x2Xzd](http://go.usa.gov/x2Xzd)
- New law requires #IRS to hold refunds for some early filers next year. <http://go.usa.gov/xWpy3> #EITC
- HCTT #76 - #Employers & software developers: ACA Assurance Testing for AIR begins Nov. 7. <http://go.usa.gov/xke7K>
- As #IRS combats #IDtheft and tax refund fraud, some legitimate refunds will be delayed <http://go.usa.gov/xWpy3>

- Check first before you go, many #IRS offices now operate by appointment. [go.usa.gov/cwIDQ](http://go.usa.gov/cwIDQ)
- “Tax Scams.” and Telephone Scams <http://go.usa.gov/3sKCk> <http://go.usa.gov/3vjPY> <http://go.usa.gov/3rwmn>
- Open season for #PTIN applications and renewals ends Dec. 31. Renew or register now. <http://go.usa.gov/xkwBE>

5.) FaceBook - Static FaceBook Ads - <https://www.facebook.com/IRS/>

- Health Coverage Providers
- Tax Scams
- Exempt Organization Select Check
- Taxpayer Bill of Rights
- YouTube Videos
- Truckers Tax Center
- Contact your Local IRS office
- ITIN Info
- Información sobre ITIN

6.) Tumblr - <http://internalrevenueservice.tumblr.com/>

11/21: Sharing Economy

11/22: April 18 (video) <https://youtu.be/VHUR2F-7IBY>

11/23: Get Ready – [www.ire.gov/GetReady](http://www.ire.gov/GetReady)

11/25: ITIN

7.) ThunderClap - <http://thndr.me/6BUhKJ>

Social media branch is helping W&I arrange a Thunderclap for December 13, 2016 (probable date). The topic is their #GetReady campaign for the upcoming filing season.

Thunderclap is still blocked from our work computer environment, however, you can help Wage reach the goal of 100 supporters by using your personal Twitter, FaceBook or Tumblr account. Simply follow this Link <http://thndr.me/6BUhKJ> to support the effort.

Message: “Get Ready Now...make sure you have everything you need to do your #taxes. #GetReady <http://thndr.me/6BUhKJ>”

## **Visual Education and Communications**

### **Internal Programs**

1. Other Projects: *(i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)*

English YouTube Tax Tips – FCP Edit (11/21-23, 11/25)

- Making An Appointment for IRS Tax Help
- Spanish YouTube Tax Tips – FCP Edit (11/21-11/23)
- April 18 is When Your Taxes are Due in 2017
  - Making An Appointment
  - Refund: Claim It or Lose It

English YouTube Tax Tips Taping @1111 (11/21)

ASL YouTube TT-61 Voice Over – Audio Recording (11/22)

External Programs

1. Videos Uploaded to IRS YouTube Channels:

- Spanish Videos:  
Getting Married (Pending Approval)
- 

**TIGTA/GAO**

No reports announced.

# **Communications and Liaison – Weekly Activity Report**

## **Week of November 28, 2016**

### **Internal Communications**

#### Headlines

- Take the new pocket commission ELMS course to learn how to request or renew the credential (AWSS)
- Make Thrift Savings Plan elections by December 24 for the first pay date in 2017 (HCO)
- Choose the paperless option for your W-2 and 1095-C (AWSS)

#### Leaders' Alert

- Newly hired disabled veterans may be entitled to 104 hours of disabled veteran leave (HCO)
- Attend the 2016 Managers CPE closeout event December 8 (HCO)
- Separating Employee Clearance (SEC) conference calls scheduled for December and January (AWSS)

#### Other News

- IRS Cares: Finding meaning in helping others (RAAS)

#### Poll Question

- Which of these incidents should you report to the IRS Situational Awareness Management Center? (AWSS)
- What IRS benefit program requires membership and helps employees get paid when they have a medical emergency, but don't have enough paid leave available? (HCO)

#### Spotlight

- 'Tis the season to de-stress (Multiple)
- Saying hello or goodbye (C&L)

#### Webbie

- View your tax account online (W&I)
- Visit the new IRS Future State website (C&L)
- Marijuana use still a violation, regardless of your state's laws (HCO)

### **Media Relations**

#### Potential news releases for this week:

- Tax preparedness series continues
- Plan now to take advantage of healthcare FSA benefits in 2017
- Saver's Credit reminder
- Incarceration exclusion: Reminder about special Dec. 19 deadline for old claims

#### Potential releases for the coming weeks

- Business e-file up
- National Tax Security Awareness Week (5 press releases)

### **National Public Liaison**



## Legislative Affairs

Not IRS Agency Records



### UPCOMING HEARINGS:

Currently, there are no hearings scheduled.

### Social Media

- 1.) YouTube video embedded/featured on IRS.gov this week:
  - Charitable Contributions <https://youtu.be/j9HdpVISMJc>
- 2.) IRS.gov front page - Rotating Spotlight
  - “Get Ready” for 2017
  - Security Summit
  - Phone and Other Tax Scams
  - Exempt Orgs
  - Health Care & Taxes
- 3.) IRS.gov front page – News
  - [Prepare for 2017: Self Employed & Sharing Economy](#)
    - Note: each Tax Preparedness Tax Tip will post here
    - Charitable Contributions on Tuesday
  - [Jan. 31 W-2 Filing Deadline for Employers](#)
  - [Sign Up Now to Become a VITA Volunteer](#)
  - [If You Need a Retirement Account, Try myRA](#)
- 4.) Twitter (@IRSnews now has 79,727 followers < +135 from last week>, @IRStaxpros has 41,627 followers < +76 >)
  - #IRS Tax Tip Preparation Series #4: #GivingTuesday charitable donations: <linkhere>
  - Get Ready Campaign – [www.irs.gov/GetReady](http://www.irs.gov/GetReady)
  - Join the IRS Thunderclap campaign: Get Ready Now... <http://thndr.me/6BUhKJ>
  - ITIN - #ITINinfo [go.usa.gov/x2Xzd](http://go.usa.gov/x2Xzd)
  - #IRS Tax Tip Preparation Series #3: Sharing Economy Resource Center. <http://go.usa.gov/x82Mf>
  - New law requires #IRS to hold refunds for some early filers next year. <http://go.usa.gov/xWpy3> #EITC
  - HCTT #77: Seasonal workers & the #HealthCare law: What #employers need to know: <http://go.usa.gov/x8XP5>
  - As #IRS combats #IDtheft and tax refund fraud, some legitimate refunds will be delayed <http://go.usa.gov/xWpy3>
  - Check first before you go, many #IRS offices now operate by appointment. [go.usa.gov/cwjDQ](http://go.usa.gov/cwjDQ)

- Open season for #PTIN applications and renewals ends Dec. 31. Renew or register now. <http://go.usa.gov/xkwBE>

5.) FaceBook - Static FaceBook Ads - <https://www.facebook.com/IRS/>

- Health Coverage Providers
- Tax Scams
- Exempt Organization Select Check
- Taxpayer Bill of Rights
- YouTube Videos
- Truckers Tax Center
- Contact your Local IRS office
- ITIN Info
- Información sobre ITIN

6.) Tumblr - <http://internalrevenueservice.tumblr.com/>

11/28 April 18 deadline (video)

11/29: VITA Volunteer & ITIN

11/30: Tax Preparedness Tax Tip: Charitable Deductions

11/30: HCTT #77: Seasonal workers & the #HealthCare law: <http://go.usa.gov/x8XP5>

12/1: Credits and Deductions

12/2: GetReady [www.irs.gov/GetReady](http://www.irs.gov/GetReady) and Thunderclap promotion

7.) ThunderClap - <http://thndr.me/6BUhKJ>

Social media branch is helping W&I arrange a Thunderclap for December 13, 2016 (probable date). The topic is their #GetReady campaign for the upcoming filing season. Thunderclap is still blocked from our work computer environment, however, you can help Wage reach the goal of 100 supporters by using your personal Twitter, FaceBook or Tumblr account. Simply follow this Link <http://thndr.me/6BUhKJ> to support the effort.

Current Campaign Status: As of Monday, November 28, 2016... 4 supporters with a reach of 146,183 followers have signed up to support the Thunderclap. 15 Days left to join.

Message: "Get Ready Now...make sure you have everything you need to do your #taxes. #GetReady <http://thndr.me/6BUhKJ>"

## **Visual Education and Communications**

### **Internal Programs**

#### **1. Video to Desk-top – Live or Recorded Events:**

RAAS Standup Celebration @1111 – Polycom/Stream (11/29)

Topic: The Office of Research, Applied Analytics & Statistics (RAAS) officially stood up on October 1, combining the RAS and OCA organization. Provide an overview and information to all RAAS employees, as well as, team building between HQ, remote and teleworking employees.

Audience: Approximately 331 RAAS employees with 45 in management, 123 management officials, and 163 in non-supervisory positions. Majority of employees are NBU (187) with the remaining classified as BU. Grade levels range from GS 8 and up. Majority of employees located in Washington DC area, but at least 70 employees are in remote locations across the United States

## 2. SABA Sessions (Captioning):

LBI - Hostile Work Environment (LR & GLS) (11/29)

Audience: LB&I Employees and Managers

Informational/Training

PDB - Future State and Communications Update (11/29)

Audience: The audience is a vast variety of communicators throughout the Service.

Informational/Training

IT - Material Weakness Deep Dive (11/30)

Audience: This will be an audience of high graded GS-12 and above IT and CFO employees who can benefit from a walk-through of the systems. We will also cover other historic and lessons learned during the creation of these systems, processes, and relationships with the stakeholders that interact and depend on these systems.

Informational/Training

EDI - RAC Call: Leave as a RA (11/30)

Audience: IRS managers and employees from the Disability Office located in various PODs around the country.

Informational/Training

HCO - Open Forum: Communication Change (11/30)

Informational/Training

TAS - FAST and PATH Acts (12/01)

Audience: TAS Quality analysts GS-13, lead case advocates GS-12, case advocates GS-11, and intake advocates GS-7, locations all across the country 9all time zones.

Informational/Training

OLS - CMS Live Forum (12/01)

Audience: All users are current users of the CMS. We have a variety of users at different grade levels.

Informational/Training

TEGE - EO CPE - IRC 4945(g) (12/01)

Audience: IRS Employees

Informational/Training

## 3. Other Projects: (i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)

ASL YouTube Tax Tips – FCP Edit (11/29-11/30)

- Tax Return Errors- Tips to Avoid them
- April 18 is When Your Taxes are Due in 2017
- Making An Appointment for IRS Tax Help
- Refund: Claim It or Lose It!
- Direct Deposit for Your Tax Refund

English YouTube Tax Tips – FCP Edit (11/28-12/02)

- Secure Access To IRS Help Tool
- Some Refunds Delayed until after Feb 15
- Making An Appointment for IRS Tax Help

Spanish YouTube Tax Tips – FCP Edit (11/30)

- Refund: Claim It Or Lose It

Spanish YouTube Tax Tips Taping (ITIN) @1111 (11/30)

#### 4. Servicewide Video Editorial Board (SVEB) – Internal:

Request #510 –Chief Counsel - Basic Trial Advocacy Video

Target Audience: Internal Audience: Chief Counsel Attorneys. The courses will be yearly, each time the Basic Trial Advocacy course is offered. The number of students will be approximately 25 each year,  
Training for IRS employees

Request #502 – HCO E-learning course: Visitor Management System Approver Course

Target Audience: Internal & External. It will be housed in ELMS for access by IRS employees and IRS contractors. It will also be housed in the Treasury Learning Management System for access by Treasury employees and Treasury contractors.  
Informational/Educational message

Request #511 – HCO Webcast - Commissioner's Wrap Up for 2016 Managers CPE

Target Audience: Internal. The audience is all 8,300 IRS managers, from front line supervisors through executives. Additionally, many others interested in their personal development may watch the recording.  
Informational/Educational message

#### External Programs

##### 1. Videos Uploaded to IRS YouTube Channels:

- English Videos:
  - Making an Appointment for IRS Tax Help
- Spanish Videos:
  - April 18<sup>th</sup> Is When Your Taxes Are Due in 2017
  - Making an Appointment for IRS Tax Help

##### 2. Servicewide Video Editorial Board (SVEB) – External:

YouTube Video Request #129 – Retirement Plan and IRA Rollovers

Target Audience: External audiences: Taxpayers with IRAs and employer-sponsored retirement plans who want to roll over funds from one IRA or plan into a IRA or plan.  
Informational/educational message

Request #509 – W&I - ITIN Program Changes – PATH Act Video

Target Audience: External – practitioner community and taxpayers, expected audience size – approximately 3,000  
Informational/educational message

#### **TIGTA/GAO**

No reports announced.

## **Communications and Liaison – Weekly Activity Report**

### **Week of December 5, 2016**

#### **Internal Communications**

##### IRS Headlines

- Newly hired disabled veterans may be entitled to disabled veteran leave (HCO)
- Post Taxpayer Bill of Rights flyer in personal work areas (C&L)
- Can't use your use-or-lose annual leave? Someone else can (HCO)
- Act now: Federal benefits open season closes December 12 (HCO)

##### Leaders' Alert

- Reminder: IRS provides support for nursing mothers (HCO)
- Encourage your employees to donate use-or-lose annual leave they can't schedule (HCO)
- HR Connect reminders help manage temporary personnel actions (HCO)

##### Poll Question

- Which is NOT a reason to use both first and last name as your Saba Meeting account display name? (PGLD)

##### Spotlight

- The giving season (Multiple)

##### Daily News (webbies)

- Send, receive faxes on your computer with Enterprise c-Fax (IT)

#### **Media Relations**

##### Potential news releases for this week:

- National Tax Security Awareness Week (5 press releases)
- Quarterly Interest Rates
- Tax preparedness series continues
- Saver's Credit reminder
- Incarceration exclusion: Reminder about special Dec. 19 deadline for old claims

##### Potential releases for coming weeks

- Business e-file up
- Plan now to take advantage of healthcare FSA benefits in 2017

#### **National Public Liaison**

Thurs. Dec. 15, 2:30 p.m. – Leadership of the American Bar Association Tax Section meets with IRS executives for courtesy meeting. Room 3313.

#### **Legislative Affairs**

##### UPCOMING MEETINGS:

Not IRS Agency Records

##### UPCOMING HEARINGS:

Currently, there are no hearings scheduled.

## **Social Media**

- 1.) YouTube video embedded/featured on IRS.gov this week:  
Taxes. Security. Together. <https://www.youtube.com/watch?v=aMH8TBeA4IE>
- 2.) IRS.gov front page - Rotating Spotlight
  - NEW – Tax Security Week
  - “Get Ready” for 2017
  - Security Summit
  - Phone and Other Tax Scams (Archive during Tax Security Week)
  - Exempt Orgs
  - Health Care & Taxes
- 3.) IRS.gov front page – News
  - [National Tax Security Awareness Week](#)
    - #4 Passwords (Monday)
    - #5 Avoid Phishing (Tuesday)
    - #1 Protect Your Clients (Wednesday)
    - #6 IRS Impersonations (Thursday)
    - #7 Summit Initiatives (Friday) and PYC Tax Tip
  - [Prepare for 2017: Self Employed & Sharing Economy](#)
  - [Charitable Donations May Cut Taxes](#)
  - [If You Need a Retirement Account, Try myRA](#)
- 4.) Twitter (@IRSnews now has 79,887 followers < +160 from last week>, @IRStaxpros has 41,731 followers < +104 >)
  - NTSAW - Passwords
  - NTSAW - Avoid Phishing (Tuesday)
  - NTSAW - Protect Your Clients (Wednesday)
  - NTSAW - #6 IRS Impersonations (Thursday)
  - NTSAW - Summit Initiatives (Friday) and PYC Tax Tip
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  - Join the IRS Thunderclap campaign: Get Ready Now... <http://thndr.me/6BUhKJ>
  - ITIN - #ITINinfo [go.usa.gov/x2Xzd](http://go.usa.gov/x2Xzd)
  - #IRS Tax Tip Preparation Series #3: Sharing Economy Resource Center. <http://go.usa.gov/x82Mf>
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  - HCTT #78: #Employers & health coverage providers have more time to provide info statements. <http://go.usa.gov/x8Q3r>
  - HCTT #77: Seasonal workers & the #HealthCare law: What #employers need to know: <http://go.usa.gov/x8XP5>
  - As #IRS combats #IDtheft and tax refund fraud, some legitimate refunds will be delayed <http://go.usa.gov/xWpy3>
  - Check first before you go, many #IRS offices now operate by appointment. [go.usa.gov/cwjDQ](http://go.usa.gov/cwjDQ)
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- Health Coverage Providers
- Tax Scams
- Exempt Organization Select Check
- Taxpayer Bill of Rights
- YouTube Videos
- Truckers Tax Center
- Contact your Local IRS office
- ITIN Info
- Información sobre ITIN

6.) Tumblr - <http://internalrevenueservice.tumblr.com/>

12/5: TST #4, April 18 Deadline (video)

12/6: TST #5, Education Credits

12/7: Tax Reminder, TAS Taxpayer Rights Conference

12/8: TST #6, HCTT #78

12/9: TST #7

7.) ThunderClap - <http://thndr.me/6BUhKJ>

Social media branch is helping W&I arrange a Thunderclap for December 13, 2016 (probable date). The topic is their #GetReady campaign for the upcoming filing season. Thunderclap is still blocked from our work computer environment, however, you can help Wage reach the goal of 100 supporters by using your personal Twitter, FaceBook or Tumbler account. Simply follow this Link <http://thndr.me/6BUhKJ> to support the effort.

Current Campaign Status: As of Monday, December 5, 2016... 43 supporters with a reach of 194,042 followers have signed up to support the Thunderclap. 15 Days left to join.

Message: "Get Ready Now...make sure you have everything you need to do your #taxes. #GetReady <http://thndr.me/6BUhKJ>"

## **Visual Education and Communications**

### Internal Programs

#### 1. Video to Desk-top – Live or Recorded Events:

TAS: State of TAS – Live Stream (12/06)

Topic: The National Taxpayer Advocate will provide an update on various TAS initiatives. This is a live program for all TAS employees. Employees will be submitting questions via email to be addressed during the broadcast. This will be a 2 hour program

Audience: All TAS employees

SBSE Town Halls: Revenue Officer (RO) Safety First - Sessions 1 & 2 – Live Stream (12/07)

Topic: This is a live streamed joint town hall between Field Collection and TIGTA to discuss updates regarding employee safety and impersonation issues while out on field visits. Project Purpose: Training - Internal Presenter(s) Name: Darren Guillot, Director, Field Collection and Micheal Delgado, Assistant IG for Investigations, TIGTA Darren Guillot, director, Field Collection, and Michael Delgado, assistant

inspector general for investigations, Treasury Inspector General for Tax Administration (TIGTA), invite revenue officers to join them in an all employee town hall meeting to discuss updates from the Servicewide Public Trust Employee Safety team.

Audience: Field Collection Employees

HCO: Commissioner's Wrap Up for 2016 Managers CPE @1111 – Polycom/Live Stream (12/08)

Topic: Live broadcast of a Wrap Up program for the 2016 Managers Continuing Professional Education Program, led by the Commissioner, with the possible participation of the two Deputy Commissioners and an executive to serve as MC.  
Audience: The audience is all 8,300 IRS managers, from front line supervisors through executives. Additionally, many others interested in their personal development may watch the recording.

## 2. SABA Sessions (Captioning):

TEGE CPE - Introduction and Working with Counsel (12/06)

Audience: IRS Employees  
Informational/Training

IT - Configuration Identification (12/06)

Audience: The course is for anyone in IT responsible for creating or reviewing standard or ad hoc reports on the status of programs, projects, or configuration items  
Informational/Training

IT - The History of the Service Center Replacement and Lessons for Today (12/07)

Audience: This will be an audience of high graded GS-12 and above IT and CFO employees who can benefit from a walk-through of the systems. We will also cover other historic and lessons learned during the creation of these systems, processes, and relationships with the stakeholders that interact and depend on these systems.  
Informational/Training

IT - Configuration Combo (12/07)

Audience: The course is for anyone in IT responsible for creating or reviewing standard or ad hoc reports on the status of programs, projects, or configuration items.  
Informational/Training

LBI - Hostile Work Environment (12/08)

Audience: LB&I Employees  
Informational/Training

TEGE - IDR Enforcement Process procedures 7114 Meeting (12/08)

Audience: IRS Employees  
Informational/Training

ACA/Tax Law Update (12/08)

Audience: The audience is a vast variety of communicators throughout the service.  
Informational/Training

IT - Managing Holiday Stress (12/08)

Audience: Information Technology employees (all grade levels) and managers who are located nationwide.



## Informational/Training

### 3. Other Projects: (i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)

#### ASL YouTube Tax Tips – FCP Edit (12/06-12/07)

- Tax Return Errors- Tips to Avoid Them
- April 18 is When Your Taxes are Due in 2017
- Making An Appointment for IRS Tax Help
- Refund: Claim It or Lose It!
- Direct Deposit for Your Tax Refund

#### English YouTube Tax Tips – FCP Edit (12/05-12/09)

- Secure Access To IRS Help Tool
- Some Refunds Delayed until after Feb 15

#### Spanish YouTube Tax Tips – FCP Edit (12/05-12/08)

- Refund: Claim It Or Lose It
- Making An Appointment for IRS Tax Help
- Tax Return Errors – Tips to Avoid Them

## External Programs

### 1. Videos Uploaded to IRS YouTube Channels:

- ASL Videos:
  - Tax Return Errors - Tips to Avoid them
  - April 18 is When Your Taxes are Due in 2017
- English Videos:
  - Secure Access To IRS Help Tool
  - Some Refunds Delayed until after Feb 15
- Spanish Videos:
  - Making an Appointment for IRS Tax Help
  - Refund: Claim it or Lose it
  - ITIN
  - Tax Return Errors - Tips to Avoid Them

### 2. Servicewide Video Editorial Board (SVEB) – External:

Request #512 – TEGE Reconciling Forms 941/W-3/W-2 to Gross Payroll Captivate Video

Target Audience: External, Government Entities

Informational/Educational message

Request #513 – TEGE Excise Tax on Federal Foreign Procurements – IRC 5000C Captivate Video

Target Audience: External, Government Entities

Informational/Educational message

## **TIGTA/GAO**

No reports announced.

# **Communications and Liaison – Weekly Activity Report**

## **Week of December 12, 2016**

### **Internal Communications**

#### Commissioner News

- Commissioner visited employees at Cincinnati campus

#### Headlines

- Reminder: IRS provides support for nursing mothers (HCO)
- Join the Leave Bank now through January 20 (HCO)
- Life events can affect your 2016 tax liability (HCO)
- RetireWise can help you plan your retirement (HCO)
- Winter weather is here: Know what to do if your office is closed or opens late (AWSS)

#### Highlights from Services and Enforcement

- CI, SB/SE collaborate to close an employment tax evasion case (DCSE)

#### Leaders' Alert

- Remind your employees: Don't use taxpayer ID numbers on the outside of shipped packages (PGLD)
- Performance appraisals are required when applying for jobs through the competitive process (HCO)
- Turn in infrequently used air cards, cell phones and BlackBerrys (IT)

#### Other News

- Help spread the word about scammers impersonating the IRS (C&L)

#### Poll Question

- How much use-or-lose leave did IRS employees forfeit in 2015? (HCO)
- When did Commissioner Koskinen announce IRS's formal adoption of the Taxpayer Bill of Rights? (C&L)

#### Spotlight

- The incredible shrinking attention span (C&L)
- Go, team, go! (teamwork) (TEGE)

#### Webbie

- Podcast: How W&I Ogden team stays engaged as they improve work processes (HCO)
- Increased telework may decrease the amount you need from the Public Transportation Subsidy Program (AWSS)

### **Media Relations**

#### Potential news releases for this week:

- Tax preparedness series continues
- Saver's Credit reminder
- Revised standard mileage rates for 2017

#### Potential releases for coming weeks

- Business e-file up

### **National Public Liaison**

Thurs. Dec. 15, 2:30 p.m. – Leadership of the American Bar Association Tax Section meets with IRS executives for courtesy meeting. Room 3313.

## **Legislative Affairs**

### UPCOMING MEETINGS:

Currently, there are no meetings scheduled.

### UPCOMING HEARINGS:

Currently, there are no hearings scheduled.

## **Social Media**

### **1.) YouTube video embedded/featured on IRS.gov this week:**

Individual Taxpayer Identification Number (ITIN) [https://youtu.be/e\\_2huRDdqmE](https://youtu.be/e_2huRDdqmE)

### **2.) IRS.gov front page - Rotating Spotlight**

- “Get Ready” for 2017
- Security Summit
- Phone and Other Tax Scams
- Exempt Orgs
- Health Care & Taxes

### **3.) IRS.gov front page – News**

- [2017 Filing Season Begins Jan. 23](#)
- [Taxpayers Warned of Tax Scams](#)
- [Now is the Time to Think About Your Health FSA](#)
- [If You Need a Retirement Account, Try myRA](#)

### **4.) Twitter (@IRSnews now has 80,086 followers < +199 from last week>,**

@IRStaxpros has 41,850 followers < +119 >)

- Get Ready Campaign – [www.irs.gov/GetReady](http://www.irs.gov/GetReady)
- Join the IRS Thunderclap campaign: Get Ready Now... <http://thndr.me/6BUhKJ>
- ITIN - #ITINinfo [go.usa.gov/x2Xzd](http://go.usa.gov/x2Xzd)
- New law requires #IRS to hold refunds for some early filers next year. <http://go.usa.gov/xWpy3> #EITC
- Coverage providers & ALEs now have until March 2, 2017 to provide Forms 1095-B or 1095-C to individuals. <http://go.usa.gov/x8mWn>
- HCTT #79: Determine your eligibility for the premium #tax credit by answering a few yes/no questions. <http://go.usa.gov/x8y4Z>
- HCTT #78: #Employers & health coverage providers have more time to provide info statements. <http://go.usa.gov/x8Q3r>
- HCTT #77: Seasonal workers & the #HealthCare law: What #employers need to know: <http://go.usa.gov/x8XP5>
- As #IRS combats #IDtheft and tax refund fraud, some legitimate refunds will be delayed <http://go.usa.gov/xWpy3>
- Check first before you go, many #IRS offices now operate by appointment. [go.usa.gov/cwjdQ](http://go.usa.gov/cwjdQ)
- Open season for #PTIN applications and renewals ends Dec. 31. Renew or register now. <http://go.usa.gov/xkwBE>

**5.) FaceBook** - Static FaceBook Ads - <https://www.facebook.com/IRS/>

- Health Coverage Providers
- Tax Scams
- Exempt Organization Select Check
- Taxpayer Bill of Rights
- YouTube Videos
- Truckers Tax Center
- Contact your Local IRS office
- ITIN Info
- Información sobre ITIN

**6.) Tumblr** - <http://internalrevenueservice.tumblr.com/>

12/12: ITIN (video)

12/13: HCTT #79

12/14: Tax Reminder Series

12/15: Charitable Contributions

12/16: Sharing Economy

**7.) ThunderClap** - <http://thndr.me/6BUhKJ>

Social media branch is helping W&I arrange a Thunderclap for Tuesday (December 13) @11:30am EST. The topic is the #GetReady campaign for the upcoming filing season. This Thunderclap campaign has reached the goal of 100 supporters for this effort.

Current Campaign Status: As of Monday, December 5, 2016... **243 supporters** with a reach of **334,747 followers**.

**Message:** "Get Ready Now...make sure you have everything you need to do your #taxes. #GetReady <http://thndr.me/6BUhKJ>"

**Visual Education and Communications**

Internal Programs

1. SABA Sessions (Captioning):

EDI - FEVS Survey Results (12/13)

Audience: All of the Staff from the Office of Equity Diversity and Inclusion, from the Executive Director down to all levels of grades.

Informational/Training

IT - The History of the Quality Improvement Project and Lessons Learned for Today (12/14)

Audience: This will be an audience of high graded GS-12 and above IT and CFO employees who can benefit from a walk-through of the systems. We will also cover other historic and lessons learned during the creation of these systems, processes, and relationships with the stakeholders that interact and depend on these systems.

Informational/Training

TEGE - EP Lunch and Learn: Planning the Exam (12/14)

Audience: IRS Employees

Informational/Training

HCO - Managing Transitions (12/14)

Informational/Training

2. Other Projects: *(i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)*

ASL YouTube Tax Tips – FCP Edit (12/15-12/16)

- ITIN
- Secure Access to IRS Self-Help Protects Your Data (Mobile)
- Some Refunds Delayed Until After February 15<sup>th</sup>
- Secure Access to IRS Self- Help Protects Your Data (Landline)

English YouTube Tax Tips – FCP Edit (12/12, 12/14, 12/16)

- Secure Access To IRS Help Tool
- ITIN

Spanish YouTube Tax Tips – FCP Edit (12/12-12/15)

- ITIN

Chief Counsel - Direct Examination Vignettes Taping @NCFB Auditorium  
(Pending Approval) (12/13)

Description: The video consists of a presentation by two presenters that will be scripted and videotaped at the IRS studio. Two vignettes will be recorded separately and rolled into the presentation. Five PowerPoint slides, three video clips, and an interview with a Chief Counsel Attorney will be also be rolled into the taping. The purpose of this video is to introduce attorneys to the importance of effective direct examination.

Audience: The audience will be Chief Counsel Attorneys.

Avid Edit - SBSE: Completing Form 656 Offer-in-Compromise (12/13)

Topic: This video would walk users through completing the Offer in Compromise form, line by line, to clear up taxpayer confusion and expedite processing on our part.

Audience: External - all taxpayers facing Collection action that want to settle their debts.

ASL YouTube Tax Tips 62 Taping (12/14)

Taping Chief Counsel - Direct Examination Executive Taping @1111 (12/14)

Description: The video consists of a presentation by two presenters that will be scripted and videotaped at the IRS studio. Two vignettes will be recorded separately and rolled into the presentation. Five PowerPoint slides, three video clips, and an interview with a Chief Counsel Attorney will be also be rolled into the taping. The purpose of this video is to introduce attorneys to the importance of effective direct examination.

Audience: Chief Counsel Attorneys.

## ASL YouTube Tax Tips 62 – Audio Recording (12/15)

SBSE: Department of Justice (DOJ) Training for Revenue Officers (SPACE ONLY) – Audio Recording (12/15)

Topic: DOJ will present information to aid revenue officers in making better civil suit and criminal referrals to enhance collection efforts. DOJ attorneys will audio record the presentation in the TV studio in New Carrollton, along with Darren Guillot from Collection.

Audience: All Collection Employees

### External Programs

#### 1. Videos Uploaded to IRS YouTube Channels:

- ASL Videos:
  - Tax Return Errors - Tips to Avoid them
  - April 18 is When Your Taxes are Due in 2017
  - Making an Appointment for IRS Tax Help
- English Videos:
  - Secure Access To IRS Help Tool
  - Some Refunds Delayed until after Feb 15
- Spanish Videos:
  - Refund: Claim it or Lose it

### **TIGTA/GAO**

No reports announced.

# **Communications and Liaison – Weekly Activity Report**

## **Week of December 19, 2016**

### **Internal Communications**

#### Headlines

- Follow these tips to keep equipment and information secure during the holidays (PGLD)
- Use Exception Time Reporting to post your time automatically (HCO)
- Report interest on back pay on income tax return (HCO)
- Include contact information on your OS GetServices tickets (HCO)

#### Highlights from Services and Enforcement

- Field Collection, National Fraud Program deter employment tax non-compliance (DCSE)

#### Leaders' Alert

- You must approve your employees' Public Transportation Subsidy Program recertification (AWSS)
- Regularly discuss UNAX with your employees (PGLD)
- Review tips for accurate time and attendance processing for retiring employees (HCO)
- Hold requests to restore annual leave until Pay Period 1 of 2017 (HCO)

#### Poll Question

- Which of the following Servicewide efforts are supported by employees at Enterprise Computing Center-Martinsburg? (IT)
- A hundred years ago (in 1916), how many individual tax returns were filed? (RAAS)

#### Spotlight

- Another year in the Spotlight (C&L)

#### Webbie

- When do your federal health benefits open season changes take effect? (HCO)
- Review guidance when posting time for upcoming holidays (HCO)

### **Media Relations**

### **National Public Liaison**

### **Legislative Affairs**

#### UPCOMING MEETINGS:

Currently, there are no meetings scheduled.

#### UPCOMING HEARINGS:

Currently, there are no hearings scheduled.

### **Social Media**

#### **1.) YouTube video embedded/featured on IRS.gov this week:**

Some Refunds May Be Delayed <https://youtu.be/EqQp9pgZ4P4> (NEW)

## 2.) IRS.gov front page - Rotating Spotlight

- "Get Ready" for 2017
- ITIN Renewal
- Phone and Other Tax Scams
- Exempt Orgs
- Health Care & Taxes

## 3.) IRS.gov front page – News

- [Prepare for 2017: What To Do Before Dec. 31](#)
- [2017 Filing Season Begins Jan. 23](#)
- [2017 Standard Mileage Rates Announced](#)
- [If You Need a Retirement Account, Try myRA](#)

## 4.) Twitter (@IRSnews now has **80,331** <+245 from last week>, @IRStaxpros has **41,955** <+105 >)

- Get Ready Campaign – [www.irs.gov/GetReady](http://www.irs.gov/GetReady)
- ITIN - #ITINinfo [go.usa.gov/x2Xzd](http://go.usa.gov/x2Xzd)
- New law requires #IRS to hold refunds for some early filers next year. <http://go.usa.gov/xWpy3> #EITC
- As #IRS combats #IDtheft and tax refund fraud, some legitimate refunds will be delayed <http://go.usa.gov/xWpy3>
- Check first before you go, many #IRS offices now operate by appointment. [go.usa.gov/cwjdQ](http://go.usa.gov/cwjdQ)
- Open season for #PTIN applications and renewals ends Dec. 31. Renew or register now. <http://go.usa.gov/xkwBE>
- Coverage providers & ALEs now have until March 2, 2017 to provide Forms 1095-B or 1095-C to individuals. <http://go.usa.gov/x8mWn>
- HCTT #80: #Tax filing season is coming: Do you qualify for an exemption from #HealthCare coverage? <http://go.usa.gov/x8FPe>
- HCTT #79: Determine your eligibility for the premium #tax credit by answering a few yes/no questions. <http://go.usa.gov/x8y4Z>
- HCTT #78: #Employers & health coverage providers have more time to provide info statements. <http://go.usa.gov/x8Q3r>
- HCTT #77: Seasonal workers & the #HealthCare law: What #employers need to know: <http://go.usa.gov/x8XP5>

## 5.) Facebook - Static FaceBook Ads - <https://www.facebook.com/IRS/>

- Health Coverage Providers
- Tax Scams
- Exempt Organization Select Check
- Taxpayer Bill of Rights
- YouTube Videos
- Truckers Tax Center
- Contact your Local IRS office
- ITIN Info
- Información sobre ITIN

## 6.) Tumblr - <http://internalrevenueservice.tumblr.com/>

## 7.) ThunderClap - <http://thndr.me/6BUhKJ>

Social media branch assisted W&I with a Thunderclap last week on Tuesday, December 13.



Final Stats: This campaign resulted with **493 supporters** and a total reach of **434,448 followers**.

**Message:** “Get Ready Now...make sure you have everything you need to do your #taxes. #GetReady <http://thndr.me/6BUhKJ>”

## **Visual Education and Communications**

### **Internal Programs**

#### **1. SABA Sessions (Captioning):**

##### **IT- Filing Season Integration Services (12/20)**

Audience: IRS IT employees involved in supporting Filing Season. All grade levels. Informational/Training

##### **IT - Deep Dive of a GAO Audit Response (12/21)**

Audience: This will be an audience of high graded GS-12 and above IT and CFO employees who can benefit from a walk-through of the systems. We will also cover other historic and lessons learned during the creation of these systems, processes, and relationships with the stakeholders that interact and depend on these systems. Informational/Training

#### **2. Other Projects: (i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)**

##### **ASL YouTube Tax Tips – FCP Edit (12/20-12/21)**

- ITIN
- Secure Access to IRS Self- Help Tools Protects Your Data (Landline)
- Secure Access to IRS Self-Help Tools Protects Your Data (Mobile)
- Some Refunds Delayed Until After February 15

##### **English YouTube Tax Tips – FCP Edit (12/20)**

- Direct Deposit

##### **Spanish YouTube Tax Tips – FCP Edit (12/19-12/22)**

- Making An Appointment for IRS Tax Help
- Tax Return Errors – Tips to Avoid Them

### **External Programs**

#### **1. Videos Uploaded to IRS YouTube Channels:**

- ASL Videos:
  - Individual Taxpayer Identification Number (ITIN)
- English Videos:
  - Secure Access To IRS Help Tool
- Spanish Videos:
  - Refund: Claim it or Lose it

#### **2. Servicewide Video Editorial Board (SVEB) – External:**

##### **YT Request #130 –TAS CL – PATH act – YouTube Video for the TAS YouTube Channel**

Target Audience: External.

Informational/Educational message

**YT Request #130 –TAS CL – Choosing a Tax Preparer – YouTube Video for the TAS YouTube Channel**

Target Audience: External.

Informational/Educational message

**Request #515 –TEGE FSLG - 10 Minutes on Filing the Form 941X Captivate Video**

Target Audience: External, Government entities

- Informational/Educational message

**TIGTA/GAO**

No reports announced.

## **Communications and Liaison – Weekly Activity Report**

### **Week of January 23, 2017**

#### **Internal Communications**

##### **Employee Email**

- The 2017 filing season begins; thank you for your dedication, hard work (Comm)

##### **Headlines**

- Phased retirement pilot for non-bargaining unit employees begins this quarter (HCO)
- View your 2016 W-2 online (HCO)
- Help wanted: IRS needs Privacy Smart employees (PGLD)
- 2017 filing season starts today (W&I)

##### **Poll Questions**

- How much was the average Earned Income Tax Credit refund for tax year 2015? (W&I)
- In her 2016 Report to Congress, National Tax Advocate (NTA) Nina Olson presents a vision for a taxpayer-centric 21st century tax administration in what section of the report? (TAS)

##### **Spotlight**

- Getting ready for the main event (C&L)

##### **Webbies**

- Online Interactive Tax Assistant gets new topics (W&I)
- Find resources about the Affordable Care Act on [IRS.gov/aca](http://IRS.gov/aca) (W&I)
- You may be invited to take the new OPM Federal Work-Life Survey starting 1/25 (HCO)
- Be diligent about your safety this winter (AWSS)

#### **Media Relations**

Potential news releases for this week:

- Filing season kick off
- EITC- Persons with disabilities (Spanish priority)
- EITC- Rural community
- EITC- Working grandparents
- EITC- Native Americans
- EITC- National EITC Awareness Day

Potential releases for coming weeks

Dirty Dozen

#### **National Public Liaison**

Weds. Jan. 25, 2-2:30 p.m. – Commissioner Koskinen meets with members of the Information Reporting Program Advisory Committee (IRPAC) and the Internal Revenue Service Advisory Council (IRSAC). IRS Auditorium.

Thurs. Jan. 26, 9 – 12 p.m. – NPL Practitioner Meeting. Mark Gillen and Jeff Wallbaum entertain practitioner questions on Future State, and Steve Whitlock will discuss possible

changes to Circular 230. Agenda also includes updates from RPO and ACA. Room 2116.

## **Legislative Affairs**

Not IRS Agency Records



### **UPCOMING HEARINGS:**

Currently, there are no hearings scheduled.

## **Social Media**

## **Visual Education and Communications**

### **Internal Programs**

#### **1. SABA Sessions (Captioning):**

##### **TEGE - FY17 TEGE CPE, IDRs and Summonses (01/23)**

Audience: IRS Employees  
Informational/Training

##### **HCO - Leadership Behavior Session (01/24)**

Audience: The session is for employees that wish to become managers or advance in management. It includes managers, Leadership Succession Review participants at all grade levels.  
Informational/Training

##### **LBI - Sexual Harassment for Managers (01/24)**

Audience: LB&I Employees & Managers  
Informational/Training

##### **PDB - Risk Management (01/24)**

Audience: The audience is a vast variety of Communicators throughout the Service.  
Informational/Training

##### **EDI - Executive Summary for the RA Appeals Process (01/25)**

Audience: IRS managers and employees from the Disability Office located in various PODs around the country.

Informational/Training

**TEGE - Audit Hour - January 2017 (01/25)**

Audience: IRS Employees  
Informational/Training

**TEGE - New IDR and Enforcement Process Training (01/26)**

Audience: IRS Employees  
Informational/Training

**LB I - Transfers of Intangible Property to Foreign Partnerships (01/27)**

Audience: LB&I Employees  
Informational/Training

**2. Other Projects:** *(i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)*

**English YouTube Tax Tips – FCP Edit (01/23-01/25)**

- Retirement Plan and IRA Rollovers
- IRA/Retirement Plan 60-Day Rollover Waivers
- Making An Appointment for IRS Tax Help

**Spanish YouTube Tax Tips – FCP Edit (01/23-01/26)**

- Refund: Tax Return Errors – Tips to Avoid Them

**Avid Edit: Criminal Investigation (CI) Lab Videos (01/23-01/26)**

**Avid Edit: Taxes. Security. Together. Video (01/24-01/25)**

**Audio Recording - SBSE: Future State Taxpayer Digital Communications (Space Only) (01/26)**

**3. Servicewide Video Editorial Board (SVEB) – Internal:**

**Request #534 - PGLD: Annual UNAX Awareness Briefing Videos**

Target Audience: Internal audience - All IRS employees, approximately 80,000 - 85,000  
Educational/Informational message

**External Programs**

**1. Videos Uploaded to IRS YouTube Channels:**

- English Videos:
  - Direct Deposit for Your Tax Refund (Pending Approval)
  - IRA/Retirement Plan 60-Day Rollover Waivers
- Spanish Videos:
  - Making an Appointment for IRS Tax Help (Pending Approval)

**2. Servicewide Video Editorial Board (SVEB) – External:**

**YT Request #132 – W&I - Workshop: Interpreting for Tax Preparation**

Target Audience: External: Deaf and Hard of Hearing Taxpayers across America.

- Educational/Informational message

**TIGTA/GAO**

No reports announced.

# **Communications and Liaison – Weekly Activity Report**

## **Week of January 30, 2017**

### **Internal Communications**

#### IRS Headlines

- Tech Tip: Break out of Groundhog Day syndrome (IT)

#### Leaders' Alert

- Time-off awards deadline is approaching (HCO)
- Display Your Civil Rights are Protected poster (EDI)
- You help us monitor our internal controls through the annual assurance process (CFO)

#### Poll Question

- Which resources have you used on IT4U's home page? (IT)
- When did Congress authorize the deduction of charitable contributions from taxable income? (RAAS)

#### Spotlight

- Keeping active during the winter (C&L)
- Attention span (C&L)

#### Daily News (webbies)

- How to find information on training guidelines (HCO)
- Free File offers free brand-name federal and state tax software to eligible taxpayers (W&I)
- Walk like a penguin: Prevent winter slips and falls (AWSS)
- Find the training policy, guidelines and procedures you need (HCO)
- File and pay your taxes on time, accurately in full (HCO)

### **Media Relations**

#### Potential news releases for this week:

- W-2 Employer Deadline
- Updated 990-N
- Dirty Dozen- Phishing
- Dirty Dozen-Phone Scams
- Dirty Dozen- IDT

#### Potential releases for coming weeks

- Dirty Dozen continues
- Refund Delay Reminder

### **National Public Liaison**

Monday Jan. 30, 2p ET -- FTC ID Theft Webinar: "Tax Professionals on the Ramparts." The FTC, IRS, and the National Association of Tax Professionals offer a webinar with practical guidance about identity theft issues important to tax professionals. Topics include scams targeting tax professionals, cybersecurity, protecting client data, and how tax professionals can help identity theft victims. Participants include John Krebs, Federal Trade Commission; Mark Kahler, Internal Revenue Service; and Larry Gray, National Association of Tax Professionals.

Tuesday Feb. 7, 9 – 9:45a - Reporting Agent Forum - Mike Damasiewicz will represent SB/SE Commissioner to discuss SB/SE initiatives and priorities for 2017. (NCFB, Room B1-303)

## **Legislative Affairs**

Not IRS Agency Records



UPCOMING HEARINGS:  
Currently, there are no hearings scheduled.

## **Social Media**

## **Visual Education and Communications**

### Internal Programs

#### 1. Video to Desk-top – Live or Recorded Events:

NTA 2016 Annual Report to Congress – Live Stream (01/30)

Topic: The National Taxpayer Advocate will discuss her 2016 Annual Report to Congress along with attorney advisors.

Audience: All TAS employees

Criminal Investigation (CI) Virtual Town Hall – Live Stream @1111 (02/01)

Topic: The Chief and Deputy Chief of CI will provide a general update on the state of CI to employees around the country.

Audience: All CI employees.

#### 2. SABA Sessions (Captioning):

TAS - Applicable Large Employers (ALEs): Identifying Potential Non-Filers (01/31, 02/02)

Audience: This training is mandatory for Case Advocates, Lead Case Advocates and Quality Reviewers. Employees in ITAP, TAG, and Systemic Advocacy should consider taking the training. It is optional for other employees. Those who are not required to take the class should discuss with their managers before attending.  
Informational/Training

TEGE - Arbitrage Updates - Changes to the Safe Harbor for Management Contracts (01/31)

Audience: IRS Employees  
Informational/Training

TEGE - Beckley Finance Meeting with TE/GE (01/31)

Audience: IRS Employees  
Informational/Training

LBI - Consolidated Net Operating Losses (NOL) (02/01)

Audience: LB&I Employees  
Informational/Training

TEGE - EO CPE - Advertising Income (02/02)

Audience: IRS Employees  
Informational/Training

3. Other Projects: *(i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)*

ASL YouTube Tax Tips – FCP Edit (02/02)

- Tax Scams via VRS
- IRA/Retirement Plan 60-Day Rollover Waivers
- Retirement Plan and IRA Rollovers
- Your Taxes in the Sharing Economy

English YouTube Tax Tips – FCP Edit (02/01-02/02)

- Retirement Plan and IRA Rollovers
- IRA/Retirement Plan 60-Day Rollover Waivers

Avid Edit: Criminal Investigation (CI) Lab Videos (01/30-02/02)

Avid Edit: Taxes. Security. Together. Video (01/31-02/03)

ASL Tax Tips 63 YouTube Taping (02/01)

Audio Recording - Voice Over - ASL Tax Tips 63 for YouTube (02/02)

## External Programs

1. Videos Uploaded to IRS YouTube Channels:

- English Videos:
  - Retirement Plan and IRA Rollovers
  - IRA/Retirement Plan 60-Day Rollover Waivers
- Spanish Videos:
  - Making an Appointment for IRS Tax Help (Pending Approval)



**TIGTA/GAO**

No reports announced.

## **Communications and Liaison – Weekly Activity Report**

### **Week of February 6, 2017**

#### **Internal Communications**

##### Headlines

- Going into non-pay status? You'll have to decide to keep or terminate your health insurance (HCO)
- Reset your SETR password yourself (HCO)
- New steps to help compliance personnel facing questions during field work (DCSE)

##### Leaders' Alert

- Document your seasonal employees' requests to stay in non-pay status (HCO)
- ConcurGov will be required for all long-term taxable travel beginning March 6 (CFO)

##### Poll Questions

- Which of the following is not one of the resources used to create the IRS Style Guide? (C&L)

##### Spotlight

- Thinking outside the box (Multiple)

##### Webbies

- Reminder: Recertify to keep your Public Transportation Subsidy Program benefits (AWSS)
- IRS online tool answers questions about personal, dependent exemptions (W&I)
- Functional, cross-functional secretarial support pilot began in SB/SE on 1/30 (AWSS)
- If you received a time-off award, don't let time run out (AWSS)
- Long-term taxable travel moves to ConcurGov (CFO)

#### **Media Relations**

##### Potential news releases for this week:

- Dirty Dozen- Return Preparer Fraud
- Dirty Dozen- Fake Charities
- Dirty Dozen- Inflated Refund Claims
- Dirty Dozen- Excessive Claims for Business Credits
- Dirty Dozen- Falsely Padding Deductions on Returns

##### Potential releases for coming weeks

- Dirty Dozen continues
- Refund Delay Reminder

##### Tax Time Guide begins

#### **National Public Liaison**

Reporting Agent Forum, Tuesday, Feb. 7 – Wednesday, Feb. 8, NCFB

Speakers include: Mike Damasiewicz who will represent SB/SE Commissioner to discuss SB/SE initiatives and priorities for 2017, ACA, TAS, CI, OLS and more.

Wednesday, Feb. 8, 1 p.m. – Outreach Leadership call.

Thursday, Feb. 16, 9-12 - NPL Practitioner Meeting - Speakers will include Tammy Ripperda, SB/SE Deputy Commissioner. (1111Constitution)

Friday, Feb. 10, 1 p.m. – Security Summit Communications Group call.

## **Legislative Affairs**

### **UPCOMING MEETINGS:**

Currently, there are no meetings scheduled.

### **UPCOMING HEARINGS:**

Currently, there are no hearings scheduled.

## **Social Media**

IRS.gov – front page featured video:

Mon 6: **Tax Scams ASL** <https://www.youtube.com/watch?v=X8Ne6yUkAms>

Tue 7 – Thu 9: **WMR Eng** <http://www.youtube.com/watch?v=-WrZR2gc-3g>

Thu 9 – Mon 13: **Payment Options Eng** <https://youtu.be/URJZEKDHxp0>

Some tweets for rotation this week:

### **Return Preparer Fraud (#TaxScam)**

#IRSDirtyDozen: Don't fall for #tax preparers with promises of huge refunds

[www.irs.gov/dirtydozen](http://www.irs.gov/dirtydozen) #IRS #TaxScam

#IRSDirtyDozen: Choose carefully when hiring #taxpro to prepare your #IRS #tax return [www.irs.gov/dirtydozen](http://www.irs.gov/dirtydozen) #TaxScam

#IRSDirtyDozen: A bad preparer's #TaxScam can mislead people into incorrect #tax credits, deductions [www.irs.gov/dirtydozen](http://www.irs.gov/dirtydozen) #IRS

Check #IRS tips for choosing #TaxPro. Don't be fooled by unscrupulous preparers [www.irs.gov/dirtydozen](http://www.irs.gov/dirtydozen) #IRSDirtyDozen #TaxScam

Got a new #TaxPro? Ask about a PTIN. #Tax preparers must register with #IRS. [www.irs.gov/dirtydozen](http://www.irs.gov/dirtydozen) #IRSDirtyDozen #taxscam

#IRSDirtyDozen: You are responsible for your #tax return even when prepared by someone else. Avoid a #taxscam. [www.irs.gov/dirtydozen](http://www.irs.gov/dirtydozen)

### **Fake Charities (#CharityScam) PENDING APPROVAL**

#IRSDirtyDozen: #IRS warns about #scam of groups impersonating charities

[www.irs.gov/dirtydozen](http://www.irs.gov/dirtydozen) #charityscam

Bogus charities attract unsuspecting donors. Avoid this #IRSDirtyDozen #tax #scam: [www.irs.gov/dirtydozen](http://www.irs.gov/dirtydozen) #charityscam #IRS

#IRSDirtyDozen: Scam artists pretend to be charities to steal your money or personal info [www.irs.gov/dirtydozen](http://www.irs.gov/dirtydozen) #charityscam #IRS

#IRSDirtyDozen: Do your research & don't be a victim: Scam artists often pose as fake charities. [www.irs.gov/dirtydozen](http://www.irs.gov/dirtydozen) #charityscam #IRS

#IRSDirtyDozen: #CharityScam often uses names & websites that sound & look like a real #nonprofit. [www.irs.gov/dirtydozen](http://www.irs.gov/dirtydozen) #IRS

### **Inflating Refunds (#Refund) PENDING APPROVAL**

Falsely inflating #tax #refund claims on the 2017 #IRSDirtyDozen.

[www.irs.gov/dirtydozen](http://www.irs.gov/dirtydozen) #IRS

#IRSDirtyDozen: Watch for unscrupulous preparers touting inflated #tax #refunds.

[www.irs.gov/dirtydozen](http://www.irs.gov/dirtydozen) #IRS

#IRSDirtyDozen: Beware if a #tax preparer promises an absurdly large #refund.

[www.irs.gov/dirtydozen](http://www.irs.gov/dirtydozen) #IRS

#IRSDirtyDozen: Filing phony 1099s or W2s is an illegal way to lower your #tax or get a #refund. Don't do it. [www.irs.gov/dirtydozen](http://www.irs.gov/dirtydozen) #IRS

#### **TT-17-09 (Feb 6) PENDING SHORT URL**

#IRSTaxTip: Many people need to take out money early from an IRA. Know the #tax effects: <link link>

#IRSTaxTip: An early withdrawal from a retirement plan can trigger an additional #IRS #tax: <link link>

#IRSTaxTip: A retirement plan early withdrawal is taking cash before you're 59½ years old. Know the #tax effects: <link link> #IRS

Rules on retirement plan early withdrawals can be complex. Use #IRS efile to file an accurate #tax return. <link link> #IRSTaxTip

#IRSTaxTip: An early withdrawal from a retirement plan may be subject to an additional #tax. Know the #IRS rules: <linklink>

#IRSTaxTip: There are exceptions to the additional #tax rules on early withdrawals from retirement plans: <link link> #IRS

#IRSTaxTip: Early withdrawals #tax rules are different for some retirement plans and IRAs. Check #IRS exceptions: <linklink>

#### **TT-17-10 (Feb. 7) PENDING SHORT URL**

#IRSTaxTip: Don't fall for #scam calls and emails posing as #IRS: <link link>

#IRSTaxTip: Many a #scam uses the #IRS name, logo or a fake website to steal your money. <link link>

Be wary of #scam calls claiming to be # IRS. Criminals often demand payment right away. <link link> #IRSTaxTip

#IRSTaxTip: A #scam may say you are due an #IRS #tax refund and ask for your bank account. Don't fall for it. <link link>

#IRS offers several tips that will help you avoid becoming a #tax #scam victim: <link link>

#Scam Alert: #IRS will NOT demand payment without allowing you to question or appeal the #tax amount owed: <link link>

#Scam Alert: #IRS will NOT ask you to pay #tax owed using a prepaid debit card or a gift card. <link link>

#Scam Alert: #IRS will NOT ask you for credit or debit card numbers over the phone. <link link>

#IRS will NOT threaten to contact local police to arrest you for non-payment of #taxes. <link link> #IRSTaxTip #scam

#IRSTaxTip: Some #scam emails link to sham #IRS websites that look real. <link link>

#IRSTaxTip: Got an #IRS phishing email to lure you to give up personal & financial info? Don't reply to the #scam: <link link>

#IRSTaxTip: Got a 'phishing' email pretending to be from #IRS? Forward it to [phishing@irs.gov](mailto:phishing@irs.gov). Then delete. <link link> #scam

#IRSTaxTip: Don't open attachments or links pretending to be from #IRS. They may have malicious code. <link link> #scam

#### **TT-17-11 (Feb. 8) PENDING SHORT URL**

#IRSTaxTip: Five #IRS tips to know about the Child #Tax Credit <link link>

DYK: A child must pass several tests to qualify for the #IRS child #tax credit? See #IRSTaxTip: <link link>

#IRS has an interactive #tax assistant online to check if you should claim the Child Tax Credit. <link link> #IRSTaxTip

#IRSTaxTip: The Child #Tax Credit may save taxpayers up to \$1000 per qualifying child. See: <link link> #IRS

DYK a grandchild, niece or nephew may qualify for the #IRS Child #Tax Credit? Learn more with this #IRSTaxTip: <link link>

### **TT-17-12 (Feb. 9) PENDING SHORT URL**

#IRSTaxTip: Guide to community-based free #tax prep. <link link> #IRS #VITA

#IRSTaxTip: Need help with an #IRS return? Volunteers offer free #tax prep every year. <link link> #VITA

#IRS-sponsored programs help millions to file their #tax returns for free. <link link>

#IRSTaxTip #VITA

#IRS works with community groups training volunteers to offer free #tax preparation services. <link link> #VITA #IRSTaxTip

#IRSTaxTip: Community groups offer free #tax prep, often to those with disabilities or limited English. <link link> #VITA

#IRSTaxTip: Volunteers offer free #tax prep to eligible taxpayers who earn \$54K or less. <link link> #VITA #IRS

#IRSTaxTip: Groups like @AARP offer free #tax help focusing on issues unique to seniors. <link link> #SeniorLiving

#IRSTaxTip: Many bases offer free #tax help to #military, focusing on special benefits, like those for combat zones. <link link> #IRS

#IRSTaxTip: Many #tax prep sites offer free software to people who made < \$64K to do their own returns. <link link> #VITA #IRS

## **Visual Education and Communications**

### **Internal Programs**

#### **1. Video to Desk-top – Live or Recorded Events:**

NTA 2016 Annual Report to Congress – Rebroadcast - Live Stream (02/09)

Topic: The National Taxpayer Advocate will discuss her 2016 Annual Report to Congress along with attorney advisors.

Audience: All TAS employees

#### **2. SABA Sessions (Captioning):**

PDB - Risk Management (02/07)

Audience: The audience is a vast variety of Communicators throughout the Service. Informational/Training

IT - Many Generations but Only One Workplace (02/09)

Audience: The audience is Information Technology employees (all grade levels) and managers who are located nationwide.

Informational/Training

3. Other Projects: (i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)

ASL YouTube Tax Tips – FCP Edit (02/07-02/09)

- Tax Scams via VRS
- IRA/Retirement Plan 60-Day Rollover Waivers
- Retirement Plan and IRA Rollovers
- Your Taxes in the Sharing Economy

English YouTube Tax Tips – FCP Edit (02/07-02/09)

- Your Taxes In the Sharing Economy

Avid Edit: Criminal Investigation (CI) Lab Videos (02/06-02/09)

## External Programs

1. Videos Uploaded to IRS YouTube Channels:

- ASL Videos:
  - Tax Scams via Video Relay Services (VRS)
- English Videos:
  - Retirement Plan and IRA Rollovers
  - IRA/Retirement Plan 60-Day Rollover Waivers
  - Your Taxes In the Sharing Economy

2. Servicewide Video Editorial Board (SVEB) – External:

Request #536 – SBSE Practicing before the IRS - Circular 230 A to Z

Target Audience: External. Tax practitioner community; CPE credits = two – ethics.

Past OPR webinars have drawn approximately 4,000 viewers.

Educational/Informational message

Request #537 – SBSE – Appeals Update via Webcast

Target Audience: External - Tax practitioner community; Approximately 4,000 viewers

Educational/Informational message

Request #538 – IT EOPS Town Hall/All Employee Meeting via Webcast

Target Audience: Internal/External: IRS employees nationwide and IRS IT contractors that do not have access to SABA - approximately 2000 viewers nationwide.

- Educational/Informational message

## **TIGTA/GAO**

No reports announced.

## **Communications and Liaison – Weekly Activity Report**

### **Week of February 13, 2017**

#### **Internal Communications**

##### Headlines

- Complete a new Form W-4 before March 18 to stay tax exempt (HCO)
- The Family and Medical Leave Act can help you when you need it (HCO)
- Verify your IT equipment when requested via email (IT)
- Find the training resources you need in the Elements of Training e-newsletter (HCO)
- It's a UNAX violation to look up your own tax information on an internal computing system (PGLD)
- OS GetServices requests for locksmith services now require manager approval (AWSS)

##### Leaders' Alert

- Your employees who receive Special Act and Manager awards may only receive time off, not monetary awards (HCO)
- IRS documents process for responding to system, application data incidents (PGLD)
- Get emergency contact information when you need it (HCO)
- Register for Treasury Executive Institute's leadership training using TEI Connect (HCO)
- Only mark the TAPS/SETR final time and attendance, end day fields for separations (HCO)

##### In Other News

- IRS Cares: Communication is power (IT)

##### Poll Question

- Which is the best resource to find detailed information about IRS employee organizations and employee resource groups? (EDI)
- Which of the following is NOT a potential data loss incident that you must report within one hour of discovering it? (PGLD)

##### Spotlight

- Hidden no more (Feb is Black History Month) (IT)

##### Webbie

- Take a short survey to tell us how we're doing with veterans' employment (HCO)
- Use updated ethics form to report conflicts of interest (Counsel)

#### **Media Relations**

Potential news releases for this week:

##### MONDAY

- Dirty Dozen - Falsifying Income to Claim Tax Credits
- Avoid the Rush – President's Day Overview

##### TUESDAY

- Dirty Dozen - Offshore Tax Cheating
- Avoid the Rush – Be Prepared if you call

##### WEDNESDAY

- Dirty Dozen - Abusive tax structures, such as certain trusts

- Avoid the Rush – Refunds (WMR, EITC, ACTC)

#### THURSDAY

- Dirty Dozen - Warning Against Frivolous Tax Arguments
- Avoid the Rush – TAC Appointments

#### FRIDAY

- Dirty Dozen Recap
- Avoid the Rush – Saturday/Monday Service

Potential releases for coming weeks:

- Avoid the Rush – IRS Peak Day (February 21)
- Low Income Taxpayer Clinic; Report on Activities
- Tax Deadline Nears for Many Farmers and Fishermen
- IRS Direct Pay Tool Offers Easiest Way to E-Pay
- Tax Time Guide Continues: Online Tools; Pub 17

### **National Public Liaison**

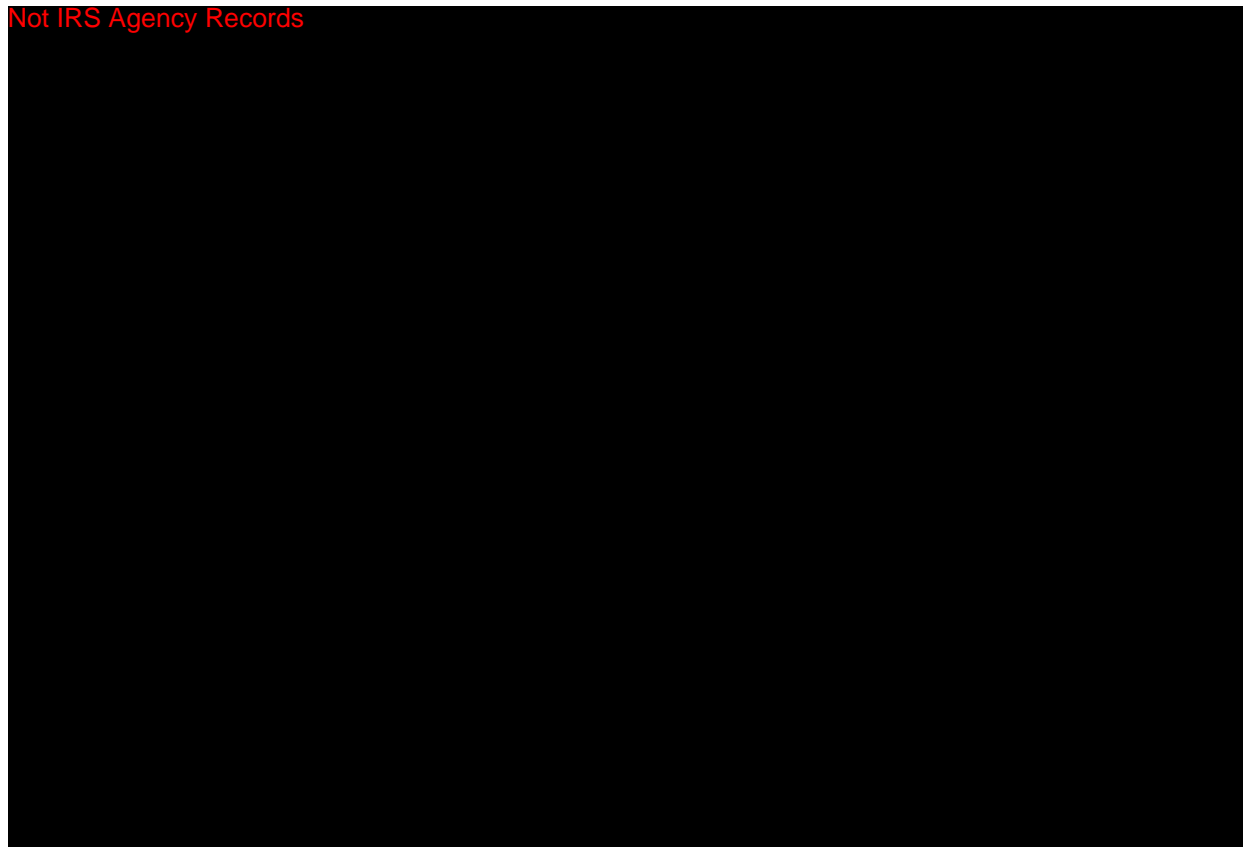
Weds. Feb. 15, 11:30 – 12:00 – Commissioner Koskinen meets with members of AICPA and other tax pro associations. (Willard Office Building, 1455 Pennsylvania Ave., NW, Washington, D.C. 10<sup>th</sup> Floor)

Thurs., Feb. 16, 9-12 – NPL Practitioner Meeting - Speakers will include Tammy Ripperda, SB/SE Deputy Commissioner. (1111 Constitution)

Weds. Feb. 22, 3:00 – Commissioner Koskinen and LB&I, Appeals and Counsel leadership meet with Tax Executives Institute. (Room 3313)

### **Legislative Affairs**

Not IRS Agency Records





UPCOMING HEARINGS:  
Currently, there are no hearings scheduled.

### **Social Media**

### **Visual Education and Communications**

#### Internal Programs

1. SABA Sessions (Captioning):

LBI - Workforce Status (02/14)  
Audience: LB&I Employees and Managers  
Informational/Training

HCO - Division Leader Chat: Project Management Office (02/14)  
Audience: This session is open to all HCO employees  
Informational/Training

LBI - Policy Statement on Fairness Briefings (02/15)  
Audience: LB&I Employees  
Informational/Training

TEGE - Lunch and Learn: CCR Documentation (02/15)  
Audience: IRS Employees  
Informational/Training

TEGE - FY17 TEGE CPE, Interviews and Information Gathering (02/16)  
Audience: IRS Employees  
Informational/Training

EDI - Embracing Change (02/16)  
Audience: All Levels of Employees  
Informational/Training

LBI - Transfers of Intangible Property to Foreign Partnerships (02/17)  
Informational/Training

2. Other Projects: (i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)

ASL YouTube Tax Tips – FCP Edit (02/14, 02/16-02/17)

- Tax Scams via VRS
- IRA/Retirement Plan 60-Day Rollover Waivers
- Retirement Plan and IRA Rollovers
- Your Taxes in the Sharing Economy

Avid Edit: Criminal Investigation (CI) Lab Videos (02/13-02/16)

3. Servicewide Video Editorial Board (SVEB) – Internal:

Request #539 – SBSE – Leadership Town hall March 8, 2017 via Webcast  
Target Audience: Internal Audience – All SB/SE managers, approximately 2200 nationwide  
Informational/educational message

#### External Programs

1. Videos Uploaded to IRS YouTube Channels:

- ASL Videos:
  - Tax Scams via Video Relay Services (VRS) – (Pending Approval)

2. Servicewide Video Editorial Board (SVEB) – External:

YouTube Request #134 – 2017 National Tax Forums  
Target Audience: External - Tax Practitioner Community. Approximately 15,000+  
Informational/educational message

Request #536 – SBSE – OPR's Annual Presentation: Practicing before the IRS - Circular 230 A to Z  
Target Audience: External. Tax practitioner community; Past OPR webinars have drawn approximately 4,000 viewers.  
Informational/educational message

Request #537 – SBSE – Appeals Update via Webcast  
Target Audience: External - Tax practitioner community; approximately 4,000 viewers  
Informational/educational message

## **Communications and Liaison – Weekly Activity Report Week of February 20, 2017**

### **Internal Communications**

#### Headlines

- View online tutorial on emailing taxpayers, stakeholders (PGLD)
- Verify your contact information in HR Connect (HCO)
- Follow these tips to resolve technology- based work stoppages (IT)

#### Leaders' Alert

- Support Microsoft Windows 10 upgrade underway now for new, refreshed and replacement computers (IT)
- Use revised Servicewide delegation order on absence and leave (HCO)
- Bring your own device program available to eligible bargaining unit employees (IT)

#### Poll Question

- IRS publishes IRS Publication 1, Your Rights as a Taxpayer, in how many languages? (C&L)

#### Spotlight

- Are you practicing good office etiquette? (Multiple)

#### Webbie

- [10 reasons to review your IRM annually](#) (RAAS)
- Accessible tax products are available on IRWeb, IRS.gov (W&I)
- IRS2Go gives you tax tools at your fingertips (W&I)

### **Media Relations**

#### Potential news releases for this week:

- Tips for peak tax-time filers
- Criminal Investigation Annual Report
- Free File options available
- IRS.gov tax assistance available
- Filing & payment options reminder for farmers & fisherman (March 2 tax deadline)

#### Potential releases for coming weeks:

- Refund Update (Feb. 27)
- Free Tax Help Available Nationwide

### **National Public Liaison**

Weds. Feb. 22, 3:00 p.m. – Commissioner Koskinen and LB&I, Appeals and Counsel leadership meet with Tax Executives Institute. Room 3313.

Tues. Feb. 28, 10:00 a.m. to 11:30 a.m. - Small Business Forum @ National Federation of Independent Business - Mary Beth Murphy, Commissioner, SB/SE will discuss SB/SE priorities for 2017.

Friday March 3, 6:00 p.m. – Federal Bar Association presents Commissioner Koskinen with the Kenneth Lyles Award. Reagan Building.

**Legislative Affairs**

Not IRS Agency Records



UPCOMING HEARINGS:  
Currently, there are no hearings scheduled.

### **Social Media**

### **Visual Education and Communications**

#### Internal Programs

#### 1. SABA Sessions (Captioning):

TEGE - CLP Discussion for EO Exam Closing Function (02/22)  
Audience: IRS Employees

## Informational/Training

TEGE - Audit Hour - February 2017 (02/22)

Audience: IRS Employees

Informational/Training

TEGE - FSLG - Return Related Penalties (02/23)

Audience: IRS Employees

Informational/Training

TEGE - FSLG - Reasonable Cause for Penalty Relief (02/23)

Audience: IRS Employees

Informational/Training

2. Other Projects: (i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)

ASL YouTube Tax Tips – FCP Edit (02/22)

- Tax Scams via VRS
- IRA/Retirement Plan 60-Day Rollover Waivers
- Retirement Plan and IRA Rollovers
- Your Taxes in the Sharing Economy

Avid Edit: Criminal Investigation (CI) Lab Videos (02/21-02/23)

3. Servicewide Video Editorial Board (SVEB) – Internal:

YouTube Request #136 – CI Refund Crimes – Tax Professionals: How to Establish a Cyber Security Plan

Target Audience: Internal and External; this video is primarily intended for external audiences and would be made to be posted on YouTube and other appropriate social media outlets. Based on the viewership of similar videos on the IRS YouTube Channel we estimate 10,000 -100,000 views.

Informational/Educational message

YouTube Request #137 – CI Refund Crimes – What To Do When Your Computer Has Been Breached?

Target Audience: Internal and External; this video is primarily intended for external audiences and would be made to be posted on YouTube and other appropriate social media outlets. Based on the viewership of similar videos on the IRS YouTube Channel we estimate 10,000 -100,000 views.

Informational/Educational message

## External Programs

1. Videos Uploaded to IRS YouTube Channels:

- ASL Videos:
  - Tax Scams via Video Relay Services (VRS) – (Pending Approval)

- Retirement Plan and IRA Rollover
- IRA and Retirement Plan 60-Day rollover Waivers

# **Communications and Liaison – Weekly Activity Report**

## **Week of February 27, 2017**

### **Internal Communications**

#### Headlines

- Windows 10 upgrade underway for new, refreshed and replacement computers (IT)
- New menu options connect you faster when calling the Employee Resource Center (HCO)
- Your feedback drives our engagement efforts (HCO)

#### Leaders' Alert

- Bring your own device program available to eligible bargaining unit employees (IT)
- 2016 Managers CPE closeout event is available for online viewing (HCO)
- IR Payband focus groups begin next week (HCO)
- Protect IRS: Collect Smart IDs, security items when employees separate or enter non-work status (AWSS)

#### Poll Question

- It's Women's History Month. When did the first woman graduate from the IRS Executive Development Program? (RAAS)
- What year did the IRS launch the IRS2Go mobile application to taxpayers? (Online Services)

#### Spotlight

- Best in show (IT)

#### Webbie

- Check the status of your refund with Where's My Refund? (W&I)
- Working together to make EITC Awareness Day a success (W&I)
- Frequently asked questions available on Public Trust and Employee Safety program (SBSE)
- Lift like a superhero: Prevent back injuries in the workplace (AWSS)
- Know how to obtain a corrected IRS Form 1095-B, Health Coverage(HCO)
- Commissioner answers questions, shares customer service praise (C&L)

### **Media Relations**

#### Potential news releases for this week:

- Free File options available
- IRS Criminal Investigation annual report
- IRS issues 100<sup>th</sup> ebook to help taxpayers
- Online tools available to help taxpayers choose a preparer
- Free tax help is available through Voluntary Income Tax Assistance (VITA) sites
- Updated comprehensive tax guide for individuals: Publication 17
- Unclaimed Refunds

#### Potential releases for coming weeks:

- Reminder: Secure Personal Information
- Tax Scams Reminder



## **National Public Liaison**

Friday March 3, 6:00 p.m. – Federal Bar Association presents Commissioner Koskinen with the Kenneth Lyles Award. Max Stier and Bill Wilkins will make remarks. Reagan Building.

## **Legislative Affairs**

Not IRS Agency Records



Not IRS Agency Records



#### **UPCOMING HEARINGS:**

On Wednesday, March 8, 2017, a hearing is scheduled to be held before the House Committee on Oversight and Government Reform on customer service issues at IRS. The hearing is scheduled for 2:00 pm, in room 2154 of the Rayburn House Office Building.

Witnesses:

- John Dalrymple, Deputy Commissioner for Services and Enforcement and Corbin Ken Corbin, Commissioner Wage & Investment Division
- Nina Olson, National Taxpayer Advocate
- Russell George, Treasury Inspector General for Tax Administration

#### **Social Media**

#### **Visual Education and Communications**

Internal Programs

1. SABA Sessions (Captioning):

HCO - Leadership Behavior Session (02/28)

Audience: The session is for employees that wish to become managers or advance in management. It includes managers, Leadership Succession Review participants at all grade levels.

Informational/Training

EDI - EDI All Staff Meeting (02/28)

Informational/Training

TEGE - Exam CPE - Private Inurement (03/02)

Audience: IRS Employees

Informational/Training

TEGE - Exam CPE - Focused Audit Procedures (03/02)

Audience: IRS Employees

Informational/Training

2. Other Projects: (i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)

ASL YouTube Tax Tips – FCP Edit (TBD)

- Secure Access to IRS Self-Help Tools Protects Your Data - Landline

Avid Edit: Criminal Investigation (CI) Lab Videos (02/27-03/02)

Casting Call for PGLD – UNAX (02/28-03/02)

Topic: Annual UNAX Awareness Briefing Videos Casting Call

Audience: All IRS employees. Approximately 80,000-85,000.

3. Servicewide Video Editorial Board (SVEB) – Internal:

AMENDED Request #538 – IT EOPS Town Hall/All Employee Meeting via Webcast

Target Audience: Internal. IRS employees nationwide and IRS IT contractors (do not have access to SABA), approximately 700 – 1700+ viewers

Informational/Educational message

External Programs

1. Videos Uploaded to IRS YouTube Channels:

- ASL Videos:
  - ASL's Your Taxes in the Sharing Economy

2. Servicewide Video Editorial Board (SVEB) - External

YT Request #130 –TAS CL – Choosing a Tax Preparer (2017 Refresh Video for the TAS YouTube Channel)

Target Audience: External

Informational/Educational message

# **Communications and Liaison – Weekly Activity Report**

## **Week of March 6, 2017**

### **Internal Communications**

#### Headlines

- Follow these tips to resolve technology-based work stoppages (IT)
- Choose the right provider for your payroll and HR Connect questions (HCO)
- Looking for information on employee organizations and resource groups? (EDI)
- If you have restored annual leave, you'll get a status report to help manage it (HCO)

#### Leaders' Alert

- Make sure your employees use only secure websites to send PII (PGLD)
- Diversity training available for managers (EDI)
- Assign a SETR proxy before you're out of the office (HCO)

#### Poll Questions

- Which of these Social Security Number Elimination and Reduction (SSN ER) solutions doesn't reduce risk in IRS forms, correspondence or systems? (PGLD)
- About how many times have IRS employees used Integrated Automation Technologies tools? (W&I)

#### Spotlight

- National Women's History Month (C&L)
- Hearing what isn't spoken (Multiple)

#### Webbie

- Campus VITA offers free tax filing services through 3/31 (W&I)
- IRS reaches 100th eBook milestone, helps advance Future State efforts (W&I)
- Daylight saving time begins 3/12 (HCO)

### **Media Relations**

#### Potential news releases for this week:

- Second Quarter Interest Rates (and related revenue ruling)
- Taxpayer Assistance Centers By Appointment -- Reminder
- Reminder: Secure Personal Information
- Tax Scams Targeting the Elderly; General Scams Reminder

#### Potential releases for coming weeks:

- Easy Electronic Payment and Payment Agreement Options Available to People Who Owe
- Still Time to Contribute to IRA for 2016
- Reminder: Where's My Refund Best Resource For Refund Status

### **National Public Liaison**

Wednesday March 8, 1 p.m. – Monthly education and outreach leadership call.

Friday March 10, 1 p.m. – Security Summit Communications Group call.

Thursday March 16, 9 a.m. – Monthly NPL Practitioner Meeting. Room 2140.

### **Legislative Affairs**

Not IRS Agency Records

Not IRS Agency Records

#### UPCOMING HEARINGS:

On Wednesday, March 8, 2017, a joint hearing is scheduled to be held before the Subcommittee on Government Operations and Subcommittee on Health Care, Benefits and Administrative Rules, House Committee on Oversight and Government Reform on customer service issues at the IRS. The hearing is scheduled for 2:00 pm, in room 2154 of the Rayburn House Office Building.

#### Witnesses:

- John Dalrymple, Deputy Commissioner for Services and Enforcement
- Russell George, Treasury Inspector General for Tax Administration

#### **Social Media**

#### **Visual Education and Communications**

##### Internal Programs

##### 1. Video to Desk-top – Live or Recorded Events:

SBSE Executive Town Hall – Live Stream (03/08)

Topics: SB/SE managers including introduction of new leadership team, priorities, future state, achievements and recognition of employees.

Audience: All SB/SE managers nationwide -approximately 1600.

EOPS Town Hall/All Employee Meeting – Onstream/NCFB (03/09)

Topics: Future State and How IT Fits into Delivery's, What is the Business of IT, EOPS Standard Stack, Q&A driven by NCFB, by ACIO EOps.

Audience: Internal audience - IRS employees, and Contractors that do not have access to Saba Approximately 700-1700 attendees.

##### 2. SABA Sessions (Captioning):

IT - IT Connections Hour: Knowledge Management (03/09)

Audience: The audience is Information Technology employees (all grade levels) and managers who are located nationwide.

Informational/Training

HCO - Veterans Town Hall (03/09)

Audience: IRS employees who are veterans of US military service throughout the country.

Informational/Training

TEGE - TE/GE iManage Overview for Acting Managers (03/10)

Audience: IRS Employees

Informational/Training

TEGE - TE/GE RCCMS Overview for Acting Managers (03/10)

Audience: IRS Employees

Informational/Training

3. Other Projects: *(i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)*

Avid Edit: Criminal Investigation (CI) Lab Videos (03/06-03/09)

4. Servicewide Video Editorial Board (SVEB) – Internal:

YouTube Request #136 – CI Refund Crimes – Tax Professionals: How to Establish a Cyber Security Plan

Target Audience: Internal and External; the video is primarily intended for external audiences and would be made to be posted on YouTube and other appropriate social media outlets. Based on the viewership of similar videos on the IRS YouTube Channel we estimate 10,000 -100,000 views.

Informational/educational message

YouTube Request #137 – CI Refund Crimes – What To Do When Your Computer Has Been Breached?

Target Audience: Internal and External; the video is primarily intended for external audiences and would be made to be posted on YouTube and other appropriate social media outlets. Based on the viewership of similar videos on the IRS YouTube Channel we estimate 10,000 -100,000 views.

Informational/educational message

Request #540 – CC Enhancing the Associate/Field Office Relationship via Webcast

Target Audience: Internal. The target audience includes all attorneys and attorney managers in both the field and associate offices. The expected audience size is up to 1500. In addition, group-viewing

Employee Training

## **Communications and Liaison – Weekly Activity Report Week of March 13, 2017**

### **Internal Communications**

#### Commissioner News

- Commissioner Koskinen receives a lifetime achievement award (C&L)
- John Dalrymple presented with the Robert E. Wenzel Excellence in Service Award (C&L)

#### IRS Headlines

- Provide reasonable accommodations for taxpayers with disabilities (EDI)
- Sunshine Week celebrates open government (PGLD)
- IT to begin office 365 ProPlus software and email upgrade rollout in April (IT)
- Report to Employees, fiscal year 2016 highlights accomplishments, challenges (CFO)

#### Highlights from Services and Enforcement

- Use the IRS Tax Map to find the tax information you need (DCSE)

#### Leaders' Alert

- Your employees must comply with the Leave Sharing Program rules (HCO)
- Tax compliance resources can help your employees understand their obligations (HCO)
- You can change some part-time work schedules without a Personnel Action Request (HCO)

#### Poll Question

- What does Sunshine Week promote? (PGLD)

#### Spotlight

- An unexpected source of inspiration (National Women's History Month) (RPO)

#### Daily News (webbies)

- Learn how to report an injury, safety incident or accident (AWSS)

### **Media Relations**

#### Potential news releases for this week:

- Electronic payment options for taxpayers
- IRA contribution reminder
- "Where's My Refund?" reminder for taxpayers
- Taxpayer Advocacy Panel: new members solicitation
- Tax scams targeting the elderly warning
- Deadline to take required minimum distributions approaching

#### Potential releases for coming weeks:

- FreeFile for filing extensions
- Free tax help for military
- Top 10 ID Theft Cases

### **National Public Liaison**

Thursday March 16 – AICPA hosts follow up to Feb. 16 meeting with association partners.

Friday March 17, 2:30 pm ET – SBSE Commissioner Murphy discusses estate lien issues with American Bar Association Tax Section. This is a follow up to the Dec. 15



ABA Courtesy Meeting with Commissioner Koskinen and IRS leadership. Conference call.

Tues. March 21, 12:45 p.m. – Commissioner Koskinen delivers keynote address at Tax Executives Institute Midyear Conference. Grand Hyatt.

**Legislative Affairs**

Not IRS Agency Records



## **Social Media**

## **Visual Education and Communications**

### **Internal Programs**

#### **1. SABA Sessions (Captioning):**

TEGE - TE/GE Required Systems - 5081 Process for Acting Managers (03/13)  
Audience: IRS Employees  
Informational/Training

TEGE - TE/GE Employee Drop Files Overview for Acting Managers (03/13)  
Audience: IRS Employees  
Informational/Training

TEGE - TE/GE IDRS Overview for Acting Managers (03/13)  
Audience: IRS Employees  
Informational/Training

PDB - The Brain and Change: Implications for Communicators (03/14)  
Audience: The audience is a vast variety of Communicators throughout the Service.  
Informational/Training

TEGE - TE/GE RCCMS Overview for Acting Managers (03/15)  
Audience: IRS Employees  
Informational/Training

TEGE - TE/GE LR-Temp Hardships Overview for Acting Managers (03/15)  
Audience: IRS Employees  
Informational/Training

TEGE - TE/GE Life as a Manager for Acting Managers (03/15)  
Audience: IRS Employees  
Informational/Training

TEGE - TE/GE TEDS Overview for Acting Managers (03/15)  
Audience: IRS Employees  
Informational/Training

EDI - Many Generations but Only One Workforce (03/16)  
Audience: All Levels of Employee's  
Informational/Training

TEGE - EP 2017 CPE the New RAP Under Rev. Proc. 2016-37 (03/17)  
Audience: IRS Employees  
Informational/Training

TEGE - TE/GE 1204 Overview for Acting Managers (03/17)  
Audience: IRS Employees  
Informational/Training

TEGE - TE/GE Performance Overview for Acting Managers (03/17)  
Audience: IRS Employees  
Informational/Training

TEGE - TE/GE WebETS Overview for Acting Managers (03/17)  
Audience: IRS Employees  
Informational/Training

TEGE - TE/GE HR Connect Overview for Acting Managers (03/17)  
Audience: IRS Employees  
Informational/Training

2. Other Projects: *(i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)*

Avid Edit: Criminal Investigation (CI) Lab Videos (03/13-03/16)

PGLD UNAX Training Taping (03/13-03/17)  
Topic: Annual UNAX Awareness Briefing Videos to develop three new scenarios for UNAX training.  
Audience: All IRS employees. Approximately 80,000-85,000

# **Communications and Liaison – Weekly Activity Report**

## **Week of March 20, 2017**

### **Internal Communications**

#### Highlights from Services and Enforcement

- Online Services works to transform IRS.gov content (DCSE)

#### IRS Headlines

- Records Radar: Managing email according to Capstone approach (PGLD)
- Know what to do to help keep your fellow employees safe from threatening taxpayers (PGLD)
- Alternative Work Schedules can help you balance work, personal responsibilities (HCO)
- New Leadership Succession Review cycle begins this month (HCO)
- You make the call: Avoid unauthorized access (PGLD)

#### Leaders' Alert

- Review and update your organization's policy statements and delegation orders (RAAS)
- Receive your career service, performance certificates and plaques on time (HCO)
- Health and life insurance certification forms are available for seasonal employees (HCO)
- Manager, management official mid-year reviews due by April 30 (HCO)

#### Poll questions

- When a tax preparer falsifies information on tax returns in order to generate larger refunds, this is called: (CI)
- What was the government's most recently reported median tax loss for prosecuted tax fraud offenses? (SBSE)

#### Spotlight

- National Nutrition Month (C&L)

#### Webbie

- Outlook email upgrade coming soon (IT)
- Listen to, learn best practices for working remotely across time zones (HCO)
- Make sure your tax return is filed properly (HCO)
- Get documents translated into other languages (W&I)
- Planning, Programming and Audit Coordination Office joins CFO (DCOS)
- The IRS is transforming Taxpayer Digital Communications (C&L)

### **Media Relations**

#### Potential news releases for this week:

- Tax scams targeting the elderly warning
- FreeFile for filing extensions
- Top 10 ID Theft Cases

#### Potential releases for coming weeks:

- Private Debt Collection
- IRS Releases 2016 Data Book

- Common Errors to Avoid
- Free Tax Help—VITA/TCE
- Reminder – IRS Taxpayer Assistance Centers by Appointment

### **National Public Liaison**

Mon. March 20, 2 p.m. – Educational dialog on Sec. 7216 requirements with new entrant in the online tax prep market.

Tues. March 21, 12:45 p.m. – Commissioner Koskinen delivers keynote address at Tax Executives Institute Midyear Conference. Grand Hyatt.

Fri. March 24, 1 p.m. – Security Summit Communications Group Call.

### **Legislative Affairs**

Not IRS Agency Records



## **NEW HEARINGS:**

On Thursday April 6, 2017, a hearing is scheduled to be held before the Senate Finance Committee on the filing season. The hearing is tentatively scheduled for 10:00 am, room number is TBD. The hearing location will be the Dirksen Senate Office Building.

Witness: Commissioner, John Koskinen is scheduled to testify

## **Social Media**

## **Visual Education and Communications**

### **Internal Programs**

#### **1. Video to Desk-top – Live or Recorded Events:**

Chief Counsel Town Hall – Live Stream (03/23)

Topic: This informational session is to strengthen the advisory process by further developing the relationship between the Chief Counsel Associate and Field Offices. The panel will discuss the issues and misconceptions that caused the disconnect between the offices during the advisory process.

Audience: Includes all attorneys and attorney managers in both the field and associate offices. The expected audience size is up to 1500. Group viewing locations will be in the national office and 50 field offices, resulting in an anticipated 200 or fewer individual streams to desktop.

#### **2. SABA Sessions (Captioning):**

TEGE - EP 2017 CPE Tax Effect of Plan Disqualification (03/20)

Audience: IRS Employees  
Informational/Training

TEGE - Issue Price Regulations (03/21)

Audience: IRS Employees  
Informational/Training

TEGE - EP 2017 CPE UBI - How to Identify and Pursue (03/22)

Audience: IRS Employees  
Informational/Training

HCO - Division Leaders Chat: Leadership Education & Delivery Services (03/22)

Audience: This session is open to all HCO Employees  
Informational/Training

LB I - No Transcript - Statue Management and Preparing a Case for Statutory Deficiency (03/22)

Audience: LB&I Employees  
Informational/Training

TEGE - TE/GE Welcome to Management Expectations for Acting Managers (03/23)

Audience: IRS Employees

Informational/Training

HCO - Leadership Behavior Session (03/23)

Audience: The session is for employees that wish to become managers or advance in management. It includes managers, Leadership Succession Review participants at all grade levels.

Informational/Training

PDB - Communicating Change (03/23)

Audience: The audience is a vast variety of Communicators throughout the Service.

Informational/Training

TEGE - EP 2017 CPE Update on New Legislation (03/24)

Audience: IRS Employees

Informational/Training

RGS Refresher Training (03/24)

Audience: IRS Employees

Informational/Training

3. Other Projects: *(i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)*

PGLD UNAX Training Taping (03/20-03/22)

Topic: Annual UNAX Awareness Briefing Videos to develop three new scenarios for UNAX training.

Audience: All IRS employees. Approximately 80,000-85,000

English YouTube Taping @1111 (03/21)

Avid Edit - English YouTube Video (03/22-03/23)

Audio Recording - SBSE: Account Product Captivate Video (03/22)

Objective: The IRS recently rolled out an online account tool that allows taxpayers to view their current balance and make payments. Available on IRS.gov, this new and secure tool allows taxpayers to view their IRS tax account, which includes the amount they owe in taxes, penalties and interest. After viewing their balance, taxpayers may take advantage of the various online payment options available including: Direct Pay, Pay by Card and Online Payment Agreement.

Audience: Internal SB/SE audience to keep them updated on this new development.

External Programs

1. Servicewide Video Editorial Board (SVEB) - External

YouTube Request #135 – Small Business Week Campaign

Target Audience: External audience – all small business owners and self-employed individuals

Informational/educational message

Request #542 – TEGE Community Health Needs Assessment for Charitable Hospital Organizations – Section 501(r)(3) Webinar using Audio Webcast  
Target Audience: External audience, charitable hospital organizations  
Informational/educational message



# **Communications and Liaison – Weekly Activity Report**

## **Week of March 27, 2017**

### **Internal Communications**

#### Employee Email

- We'd like your input on our Strategic Plan priorities (Commissioner)

#### IRS Headlines

- IRS releases 2017 Allowable Living Expense standards (SB/SE)
- Properly use and store sensitive tax and personnel information (PGLD)
- Press option 4 to reach the HR Connect Help Desk when calling the Operations Support Customer Assistance Line (HCO)

#### Highlights from Services and Enforcement

- Cross-functional Baltimore project team uncovers complex foreign tax scheme

#### Leaders' Alert

- Familiarize yourself with the Strategic Plan framework documents and managers' toolkit (CFO)
- Guidance for approving religious compensatory time (HCO)
- Let Outlook remind you of SETR deadlines (HCO)
- Review updated quick reference guide on excused absences (HCO)
- The ePerformance guidance webpage provides tools, resources (HCO)

#### Poll Question

- What is not included in the Taxpayer Bill of Rights' Right to Quality of Service? (C&L)
- According to the IRS Style Guide, how should the term "acting" appear in the following? (C&L)

#### Spotlight

- Naming rights (Celebrate Your Name Week) (Multiple)

#### Daily News (Webbies)

- Take your virtual presentation from boring to soaring (HCO)
- Countdown to 4/18: File and pay your taxes timely (W&I)
- Understand how to address tax-related identity theft (W&I)
- The future of taxpayer service continues to take shape (W&I)

### **Media Relations**

#### Potential news releases for this week:

- FreeFile tops 50 million users
- Top 10 ID theft cases from last year
- Private Debt Collection program begins
- Warning on phishing scams
- IRS releases 2016 data book

#### Potential releases for coming weeks:

- Common errors to avoid
- Free tax help—VITA/TCE
- Reminder – IRS Taxpayer Assistance Centers by appointment
- Use IRS.gov tools

### **National Public Liaison**

**Legislative Affairs**

Not IRS Agency Records



### **UPCOMING HEARINGS:**

On Thursday April 6, 2017, a hearing is scheduled to be held before the Senate Finance Committee on the filing season. The hearing is tentatively scheduled for 10:00 am, room number is TBD. The hearing location will be the Dirksen Senate Office Building.

Witness: Commissioner, John Koskinen is scheduled to testify

### **Social Media**

### **Visual Education and Communications**

#### **Internal Programs**

#### **1. SABA Sessions (Captioning):**

EDI - RA for LR Chiefs/Leads and NTEU Chapter Presidents (03/27)  
Informational/Training

TEGE - TEDS Overview for Acting Managers (03/27)  
Audience: IRS Employees  
Informational/Training

TEGE - CP 2017 CPE New RAP under Rev. Proc. 2016-37 (03/27)  
Audience: IRS Employees  
Informational/Training

TEGE - EP 2017 CPE Auditing Trust Assets (03/28)  
Audience: IRS Employees  
Informational/Training

EDI - EDI All Staff Meeting (03/28)  
Informational/Training

TEGE - EP 2017 CPE Risk Transfer & Notice 2015-49 (03/28)  
Audience: IRS Employees  
Informational/Training

TEGE - TE/GE Town Hall Meeting Highlighting LSS (03/29)  
Audience: IRS Employees  
Informational/Training

TEGE - ITG CPE: The Latest Outreach Tools and Training (03/29)  
Audience: IRS Employees  
Informational/Training

TEGE - Audit Hour - March 2017 (03/29)  
Audience: IRS Employees  
Informational/Training

TEGE - FSLG - Records Retention (03/30)  
Audience: IRS Employees  
Informational/Training

TEGE - FSLG - EDI - The Three Cs (03/30)  
Audience: IRS Employees  
Informational/Training

TEGE - EP 2017 CPE IRC 401(k) Safe Harbor – Overview (03/31)  
Audience: IRS Employees  
Informational/Training

TEGE - TE/GE Welcome to Management and Expectations (03/31)  
Audience: IRS Employees  
Informational/Training

2. Other Projects: *(i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)*

English YouTube Tax Tips – FCP Edit (03/27, 03/29)  
• Tax Forum 2017

Avid Edit: Criminal Investigation (CI) Lab Videos (03/28-03/31)

PGLD UNAX Training Taping (03/29)  
Topic: Annual UNAX Awareness Briefing Videos to develop three new scenarios for UNAX training.  
Audience: All IRS employees. Approximately 80,000-85,000.

Avid Edit - PGLD UNAX Training Video (03/30-03/31)

### 3. Servicewide Video Editorial Board (SVEB) – Internal:

Request #543 – W&I SPEC Virtual Partner Recognition Ceremony for Filing Season 2017

Target Audience: Internal/External. This webcast is primarily for external VITA/TCE partners. Since the “live” ceremony will only allow up to 1,000 participants, the recorded session will be made available to partners, volunteers and IRS employees who could not attend the actual event.  
Informational/Educational message

#### External Programs

##### 1. Videos Uploaded to IRS YouTube Channels:

- English Videos:  
Tax Forum 2017

# **Communications and Liaison – Weekly Activity Report**

## **Week of April 3, 2017**

### **Internal Communications**

#### Commissioner News

- DCSE Kirsten Wielobob visits KC campus (4/5-6) (Comm)

#### Headlines

- It's your responsibility to know about, prevent Unauthorized Access of taxpayer accounts (PGLD)
- Review Online 5081 guidance for submitting TAPS/SETR requests (HCO)
- Veterans town hall meetings promote community and camaraderie (HCO)
- Cybersecurity reminds you to keep your systems safe (IT)
- You may request time off for religious observances (HCO)
- You're responsible for the accuracy of your filed tax return (HCO)
- Let businesses, tax pros know how they should report data loss (W&I)

#### Highlights from Services and Enforcement

- Teamwork helps employees understand new refundable credit (DCSE)

#### Leaders' Alert

- EDI to host monthly cultural competency Q&A sessions (EDI)
- Don't put medical documentation in employee performance files (EDI)
- Prepare for SharePoint 2013 upgrade with these simple steps (IT)
- Granting administrative leave for employee organization conferences (EDI)

#### Other News

- Three from IRS recognized for excellence in IT in this year's Fed 100 winners (C&L)

#### Poll Question

- About how many IRS acronyms does the ReferenceNet Acronym Database contain? (RAAS)

#### Spotlight

- Witnessing history (Multiple)
- Fantastic facts and where to find them (What have you learned from Spotlight?) (C&L)
- My brother's keeper (organ donation) (CI)

#### Webbie

- Don't let your workstation be a pain in your neck (AWSS)
- Know your proper filing status (HCO)

Have a question about government ethics rules and how they apply to you? (Counsel)

### **Media Relations**

#### Potential news releases for this week:

- Unclaimed refunds reminder
- Common errors to avoid
- Private Debt Collection program begins
- Scams targeting people with Limited English
- Top 10 ID theft cases from last year
- Extended hours on IRS toll-free line -- last two Saturdays
- Free tax help -- VITA/TCE
- Use IRS.gov tools

#### Potential releases for coming weeks:

- Choosing a tax preparer
- Reminder – IRS Taxpayer Assistance Centers by appointment
- IRS reminds those with foreign assets of U.S. tax obligations
- Choose direct deposit for tax refunds
- FreeFile, extensions, payment options
- Tax filing guidance for victims of recent disasters

### **National Public Liaison**

Thu. April 6, 1 pm ET – Security Summit Tax Pros Group conference call.

Fri. April 7, 1 pm ET – Security Summit Communications Group conference call.

Nationwide Tax Forums Paid Registrations as of March 31, 2017:  
1,185, +32 percent versus 3/31/2016.

### **Legislative Affairs**

Not IRS Agency Records







### **UPCOMING HEARINGS:**

On Thursday, April 6, 2017, a hearing is scheduled to be held before the Senate Finance Committee on the filing season. The hearing is scheduled for 10:00 am, room number is TBD. The hearing location will be the Dirksen Senate Office Building.

Witness: Commissioner, John Koskinen is scheduled to testify

On Wednesday, April 26, 2017, a hearing is scheduled to be held before the Ways & Means Oversight Subcommittee, House Ways and Means Committee on the filing season. The hearing is scheduled for 2:00 pm, in room 1100 of the Longworth House Office Building.

Witness: Commissioner, John Koskinen is scheduled to testify

### **Social Media**

### **Visual Education and Communications**

#### **Internal Programs**

#### **1. Video to Desk-top – Live or Recorded Events:**

Chief Counsel: SBSE Town Hall @1111– Polycom/Stream (04/05)

Topic: Chief Counsel will host an SBSE Town Hall that will cover hot topics in SBSE

Audience: SBSE Tax Attorneys and Paralegals

#### **2. SABA Sessions (Captioning):**

HCO - Division Leaders Chat: Office of Executive Services (04/05)

Audience: This session is open to all HCO employees

Informational/Training

TEGE - CPE - Charitable Purposes (04/06)

Audience: IRS Employees

Informational/Training

TEGE - Non-Hospital Healthcare Organizations (04/06)

Audience: IRS Employees

## Informational/Training

3. Other Projects: (i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)

English YouTube Tax Tips – FCP Edit (04/03, 04/05)

- Getting Married

Avid Edit: Criminal Investigation (CI) Lab Videos (04/03-04/06)

Avid Edit - PGLD UNAX Training Video (04/03-04/07)

4. Servicewide Video Editorial Board (SVEB) – Internal:

Request VR#544 – IT UNS Town hall on May 9, 2017 via Webcast

Target Audience: Internal/External - UNS employees and UNS contractors. Approx. number of employees in attendance in auditorium is 300; approx. in attendance via Onstream 800. The cost includes up to Informational/educational message

Request VR#546 – IT AD Town hall on May 4, 2017 via Webcast

Target Audience: Internal and External Audience, IRS Employees from Applications Development (AD). Approximate audience size is 1,950 employees. Our contractors are also invited optionally. That is another approx. 1100 people. Based on historical statistics of Onstream views, we expect minimal views over 1000. For costing purposes, we estimate 100 views over the 1000 views included in the “additional video webcast” fee. Informational/educational message

## External Programs

1. Videos Uploaded to IRS YouTube Channels:

- English Videos:
  - Getting Married

2. Servicewide Video Editorial Board (SVEB) – External:

AMENDED YouTube Request VR#132 – SPEC Tax Term Vocabulary for Deaf and Hard of Hearing Taxpayers ASL Video

Target Audience: External: Deaf and Hard of Hearing Taxpayers across America. Informational/educational message

Request VR#547 – W&I Refundable Credits Audit Video

Target Audience: External - Tax practitioners and professionals community who will attend the 2017 Nationwide Tax Forums to receive continual education credit. We then will repurpose for use on EITC and Refundable Credit Website and IRS Video Portal. The approximate expected viewing audience is over 7,000. Informational/educational message

Request VR#548 – W&I Refundable Credits Due Diligence Video

Target Audience: External - Tax practitioners and professionals community who will attend the 2017 Nationwide Tax Forums to receive continual education credit. We then will repurpose for use on EITC and Informational/educational message

Request VR#549 – TEGE FSLG Payroll Reporting for Election Workers Captivate Video  
Target Audience: External audience (Federal, State and Local Government Entities)  
Informational/educational message

# **Communications and Liaison – Weekly Activity Report**

## **Week of April 10, 2017**

### **Internal Communications**

#### IRS Headlines

- Prepare for SharePoint 2013 upgrade with these simple steps (IT)
- Don't record it if it's not part of your official duties (HCO)
- New program on domestic violence, sexual assault provides education, support (HCO)
- Employee Personal Page implements additional security enhancements (HCO)

#### Highlights from Services and Enforcement

- Joint efforts protect millions in employee retirement benefits (DCSE)

#### Leaders' Alert

- You may grant time off for volunteer activities (HCO)
- You're responsible for reporting injuries, incidents and accidents in the workplace (AWSS)
- Hold your annual consolidated ethics discussions with your employees (HCO)
- You don't need to submit a Records Management Checklist for certain temporary appointments (PGLD)
- Get more direct access to your CareerConnector hiring certificates (HCO)
- Learn how to review and approve travel documents in ConcurGov (CFO)
- Attend ePerformance 6850 BU/NBU training for managers and proxies (HCO)

#### Poll Question

- Which of the following taxpayers would NOT meet Potentially Dangerous Taxpayer criteria? (PGLD)
- As an IRS employee, what are the consequences of not being tax compliant? (HCO)

#### Spotlight

- Sharing our knowledge abroad (International Visitors' Program) (LB&I)

#### Daily News (webbies)

- Use electronic payment options to pay your taxes (W&I)
- Interim guidance affects some long-term travel, train travel, car rental (CFO)
- Reminder: Take the Strategic Plan survey by 4/14 (CFO)
- Put your best foot forward (protect your feet at work) (AWSS)
- IRS highlights Taxpayer Bill of Rights (C&L)

### **Media Relations**

#### Potential news releases for this week:

- Scams targeting people with Limited English
- Top 10 ID theft cases from last year
- Choosing a tax preparer
- IRS reminds those with foreign assets of U.S. tax obligations
- Choose direct deposit for tax refunds
- Reminder for: FreeFile, extensions, payment options
- Tax filing guidance for victims of recent disasters

#### Potential releases for coming weeks:

- Don't miss tax filing deadline
- Filing season wrap-up/filing statistics/Where's My Refund?

### **National Public Liaison**

Tue. April 11, 3 pm – Conversation between Tax Executives Institute (TEI) and Accounts Management Director Kevin Morehead on EIN issue.

Wed. April 12, 1 pm – Monthly Education & Outreach call.

### **Legislative Affairs**

NOT IRS AGENCY RECORDS



### **UPCOMING HEARINGS:**

On Wednesday, April 26, 2017, a hearing is scheduled to be held before the Ways & Means Oversight Subcommittee, House Ways and Means Committee on the filing season. The hearing is scheduled for 2:00 pm, in room 1100 of the Longworth House Office Building.

Witness: Commissioner, John Koskinen is scheduled to testify

### **Social Media**

### **Visual Education and Communications**

#### Internal Programs

#### 1. SABA Sessions (Captioning):

LBI - Employee Organizations (04/11)

Audience: Employees and Managers

Informational/Training

OLS - IRS.gov Transformation: Content Reduction and Content Freeze (04/12)

Audience: CMS Users from Business Units

Informational/Training

IT - IT Connections Hour: Team Building (04/13)

Audience: The audience is Information Technology employees (all grade levels) and managers who are located nationwide

Informational/Training

TEGE - Coordination between ITG and Collections (04/13)

Audience: IRS Employees

Informational/Training

TEGE - TE/GE Data Security 'Tips & Trends' (04/13)

Audience: IRS Employees

Informational/Training

#### 2. Other Projects: *(i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)*

English YouTube Tax Tips – FCP Edit (04/10-04/14)

- Getting Married
- SBSE Tax Center

Avid Edit: Criminal Investigation (CI) Lab Videos (04/10-04/13)

Avid Edit - PGLD UNAX Training Video (04/10-04/14)

Criminal Investigation (CI) YouTube Taping @1111 (04/11)

Avid Edit – Criminal Investigation (CI) YouTube Video – Private Collection of Overdue Taxes (04/12-04/13)

3. Servicewide Video Editorial Board (SVEB) – Internal:

Request VR#551 – HCO Ted Talks Seminar Series for WBP Leadership Development  
Target Audience: Internal. Interested HCO:WBP employees on a voluntary basis; Per HCO: “We have 140 employees in the division and we typically get anywhere from 10 – 20 folks patriating in the Leadership Development sessions. We anticipate the audience may be larger for the TED Talks sessions, due to the popularity of TED Talks.”

Informational/Educational Message

External Programs

1. Videos Uploaded to IRS YouTube Channels:

- English Videos:
  - Getting Married

2. Servicewide Video Editorial Board (SVEB) – External:

Request VR#552 – TEGE Corrections 941-X, W2c Captivate Video

Target Audience: External audience - Indian tribes

Informational/Educational Message

Request VR#553 – TEGE Electronic W-2s Captivate Video

Target Audience: External audience - Indian tribes

Informational/Educational Message

Request VR#554 – TEGE Form 940 – Federal Unemployment Tax Captivate Video

Target Audience: External audience - Indian tribes

Informational/Educational Message

Request VR#555 – TEGE Filing Form 941 Captivate Video

Target Audience: External audience - Indian tribes

Informational/Educational Message

Request VR#556 – TEGE Year End Reporting Captivate Video

Target Audience: External audience - Indian tribes

Informational/Educational Message

Request VR#557 – TEGE Travel and Other Business Expenses Captivate Video

Target Audience: External audience - Indian tribes

Informational/Educational Message

# **Communications and Liaison – Weekly Activity Report**

## **Week of April 10, 2017**

### **Internal Communications**

#### IRS Headlines

- Prepare for SharePoint 2013 upgrade with these simple steps (IT)
- Don't record it if it's not part of your official duties (HCO)
- New program on domestic violence, sexual assault provides education, support (HCO)
- Employee Personal Page implements additional security enhancements (HCO)

#### Highlights from Services and Enforcement

- Joint efforts protect millions in employee retirement benefits (DCSE)

#### Leaders' Alert

- You may grant time off for volunteer activities (HCO)
- You're responsible for reporting injuries, incidents and accidents in the workplace (AWSS)
- Hold your annual consolidated ethics discussions with your employees (HCO)
- You don't need to submit a Records Management Checklist for certain temporary appointments (PGLD)
- Get more direct access to your CareerConnector hiring certificates (HCO)
- Learn how to review and approve travel documents in ConcurGov (CFO)
- Attend ePerformance 6850 BU/NBU training for managers and proxies (HCO)

#### Poll Question

- Which of the following taxpayers would NOT meet Potentially Dangerous Taxpayer criteria? (PGLD)
- As an IRS employee, what are the consequences of not being tax compliant? (HCO)

#### Spotlight

- Sharing our knowledge abroad (International Visitors' Program) (LB&I)

#### Daily News (webbies)

- Use electronic payment options to pay your taxes (W&I)
- Interim guidance affects some long-term travel, train travel, car rental (CFO)
- Reminder: Take the Strategic Plan survey by 4/14 (CFO)
- Put your best foot forward (protect your feet at work) (AWSS)
- IRS highlights Taxpayer Bill of Rights (C&L)

### **Media Relations**

#### Potential news releases for this week:

- Scams targeting people with Limited English
- Top 10 ID theft cases from last year
- Choosing a tax preparer
- IRS reminds those with foreign assets of U.S. tax obligations
- Choose direct deposit for tax refunds
- Reminder for: FreeFile, extensions, payment options
- Tax filing guidance for victims of recent disasters

#### Potential releases for coming weeks:

- Don't miss tax filing deadline
- Filing season wrap-up/filing statistics/Where's My Refund?



### **National Public Liaison**

Tue. April 11, 3 pm – Conversation between Tax Executives Institute (TEI) and Accounts Management Director Kevin Morehead on EIN issue.

Wed. April 12, 1 pm – Monthly Education & Outreach call.

### **Legislative Affairs**

Not IRS Agency Records



### **UPCOMING HEARINGS:**

On Wednesday, April 26, 2017, a hearing is scheduled to be held before the Ways & Means Oversight Subcommittee, House Ways and Means Committee on the filing season. The hearing is scheduled for 2:00 pm, in room 1100 of the Longworth House Office Building.

Witness: Commissioner, John Koskinen is scheduled to testify

### **Social Media**

### **Visual Education and Communications**

#### Internal Programs

#### 1. SABA Sessions (Captioning):

LBI - Employee Organizations (04/11)

Audience: Employees and Managers

Informational/Training

OLS - IRS.gov Transformation: Content Reduction and Content Freeze (04/12)

Audience: CMS Users from Business Units

Informational/Training

IT - IT Connections Hour: Team Building (04/13)

Audience: The audience is Information Technology employees (all grade levels) and managers who are located nationwide

Informational/Training

TEGE - Coordination between ITG and Collections (04/13)

Audience: IRS Employees

Informational/Training

TEGE - TE/GE Data Security 'Tips & Trends' (04/13)

Audience: IRS Employees

Informational/Training

#### 2. Other Projects: *(i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)*

English YouTube Tax Tips – FCP Edit (04/10-04/14)

- Getting Married
- SBSE Tax Center

Avid Edit: Criminal Investigation (CI) Lab Videos (04/10-04/13)

Avid Edit - PGLD UNAX Training Video (04/10-04/14)

Criminal Investigation (CI) YouTube Taping @1111 (04/11)

Avid Edit – Criminal Investigation (CI) YouTube Video – Private Collection of Overdue Taxes (04/12-04/13)

3. Servicewide Video Editorial Board (SVEB) – Internal:

Request VR#551 – HCO Ted Talks Seminar Series for WBP Leadership Development  
Target Audience: Internal. Interested HCO:WBP employees on a voluntary basis; Per HCO: “We have 140 employees in the division and we typically get anywhere from 10 – 20 folks patriating in the Leadership Development sessions. We anticipate the audience may be larger for the TED Talks sessions, due to the popularity of TED Talks.”

Informational/Educational Message

External Programs

1. Videos Uploaded to IRS YouTube Channels:

- English Videos:
  - Getting Married

2. Servicewide Video Editorial Board (SVEB) – External:

Request VR#552 – TEGE Corrections 941-X, W2c Captivate Video

Target Audience: External audience - Indian tribes

Informational/Educational Message

Request VR#553 – TEGE Electronic W-2s Captivate Video

Target Audience: External audience - Indian tribes

Informational/Educational Message

Request VR#554 – TEGE Form 940 – Federal Unemployment Tax Captivate Video

Target Audience: External audience - Indian tribes

Informational/Educational Message

Request VR#555 – TEGE Filing Form 941 Captivate Video

Target Audience: External audience - Indian tribes

Informational/Educational Message

Request VR#556 – TEGE Year End Reporting Captivate Video

Target Audience: External audience - Indian tribes

Informational/Educational Message

Request VR#557 – TEGE Travel and Other Business Expenses Captivate Video

Target Audience: External audience - Indian tribes

Informational/Educational Message

# **Communications and Liaison – Weekly Activity Report**

## **Week of April 24, 2017**

### **Internal Communications**

#### Employee email

- Your feedback is important: Please take the Federal Employee Viewpoint Survey (C&L)

#### IRS Headlines

- Counsel provides Hatch Act guidance on candidates seeking reelection (Counsel)
- Public Service Recognition Week is May 7-13 (HCO)
- Review your Personal Benefits Statement for 2016 (HCO)
- Follow ethics rules, protect taxpayer rights to keep your job (HCO)
- Your SmartID card will expire if you don't re-enroll when notified (AWSS)

#### Leaders' Alert

- Encourage your employees to use plain language resources (C&L)
- Review Anti-Harassment Policy and processes (EDI)
- Thanks for participating in the IRS payband survey and focus groups (HCO)
- Encourage your employees to take the Federal Employee Viewpoint Survey (HCO)
- Additional guidance clarifies when to notify CFO to prevent financial reporting issues (CFO)

#### Poll questions

- When should medical documents be included in an Employee Performance File? (EDI)

#### Spotlight

- Never the same day twice (Administrative Professionals Day) (CI)

### **Media Relations**

#### Potential news releases for this week:

- Tips If you missed the April 18<sup>th</sup> deadline
- IRS thanks tax volunteers
- Top 10 ID theft cases from last year
- IRSAC recruitment period begins
- IRS highlights small business products (Small Business Week)

#### Potential releases for coming weeks:

- IRS accepting applications for 2018 LITC
- Small businesses urged to utilize WOTC
- Small businesses can benefit from research credit
- Deducting your home office
- IRS marks national military appreciation month

### **National Public Liaison**

- IRPAC Working Session – April 25 & 26 – Washington, DC

**Legislative Affairs**

Not IRS Agency Records



## **UPCOMING HEARINGS:**

On Wednesday, April 26, 2017, a hearing is scheduled to be held before the Ways & Means Oversight Subcommittee, House Ways and Means Committee on the filing season. The hearing is scheduled for 2:00 pm, in room 1100 of the Longworth House Office Building.

Witnesses: Kirsten Wielibob, Deputy Commissioner for Services and Enforcement is scheduled to testify. GAO and TIGTA are scheduled to testify as well.

On Wednesday, May 3, 2017, a hearing is scheduled to be held before the House Committee on Oversight and Government Reform. The hearing will examine the cybersecurity incident that has affected the Data Retrieval Tool (DRT) and the information assurance practices of the FAFSA application. The hearing is scheduled for 9:30 am, in room 2154 of the Rayburn House Office Building.

Witnesses: Ken Corbin, Commissioner, Wage and Investment and Gina Garza, Chief Information Officer are scheduled to testify.

## **Social Media**

## **Visual Education and Communications**

### Internal Programs

#### 1. SABA Sessions (Captioning):

OLS - Live Forum for CMS Users (04/24)

Audience: CMS Users, OLS  
Informational/Training

IT - KISAM Change Coordinator Change Role Training (04/26)

Audience: KISAM users include IT, Non-IT areas  
Informational/Training

TEGE - Reviewing IDRS Reports in VC (04/26)

Audience: IRS Employees  
Informational/Training

TEGE - FSLG - Back to Basics Pt I - Pre Audit & Initial IDR (04/27)

Audience: IRS Employees  
Informational/Training

HCO - Leadership Behavior Session (04/27)

Audience: The session is for employees that wish to become managers or advance in management. It includes managers, Leadership Succession Review participants at all grade levels.  
Informational/Training

C&L - PDB: Internal Communications: a SharePoint Guide for Communicators (04/27)

Audience: The audience is a vast variety of Communicators throughout the Service.  
Informational/Training

TEGE - FSLG - Back to Basics Pt 2 - The Initial Interview (04/27)

Audience: IRS Employees  
Informational/Training

2. Other Projects: (i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)

Spanish YouTube Tax Tips – FCP Edit (04/24)

- Private Debt Collection

Criminal Investigation Video Taping @1111 (04/26)

Chief Counsel Ethics Vignettes Taping @NCFB (04/27)

Criminal Investigation (CI) YouTube Taping: Security for Tax Professionals@1111 (04/27)

Topic: Why Tax Professionals Need a Security Plan presented by CI.

Audience: Tax Professionals

3. Servicewide Video Editorial Board (SVEB) – Internal:

Request #560 – LB&I Straddle Challenges CPA CPE (Intermediate Issues) via Saba Meeting

Target Audience: Internal. Audience is LB&I revenue agents, specifically targeting those working financial product revenue agent issues, expected audience size: up to 750.

Purpose: Employee training

Request #561– EDI Mandatory Briefings ASL Videos - Pilot Project

Target Audience: Internal. IRS deaf or hard of hearing employees who learn ASL as a first language, a second language, and bilingually

PURPOSE: Mandatory employee training

External Programs

1. Videos Uploaded to IRS YouTube Channels:

- English Videos:
  - Private Debt Collection
  - SB/SE Tax Center
- Spanish Videos:
  - Private Debt Collection

**Stakeholder Liaison Field**

Small Business Forums: Held with organizations representing small business owners including Chambers of Commerce, BBB, NFIB, specific industry groups like construction, hospitality, etc. The participants also include governmental organizations including the SBA, SSA, SCORE, and the SBDCs. (Congressional members named FYI only. They do not attend)

- Wed. April 26: Indianapolis. IN.
  - Congressman Andre' Carson
  - Topics: New Entrepreneurs Initiative, Identity Theft and Phishing , PDC, Sharing Economy, Small Business Week
- Thurs. April 27: Columbia, SC.
  - Congressmen Joe Wilson and James Clayburn
  - Topics: Collection User Fees, Identity Theft and Phishing Tax Security Awareness, Future State, Online Payment Agreements, Small Business Week

Practitioner Liaison Meeting (PLMs): Meetings held with practitioner organization leadership and representatives of key IRS functions. Provides a venue for sharing IRS key messages as well as practitioner concerns. Formal meeting notes are captured by SLF, leveraged through the organizations to their membership. Oftentimes, IRMS issues are developed from these meetings. (Congressional members named FYI only. They do not attend)

- Fri. April 28: Albuquerque, NM:
  - Congresswoman Michelle Lujan Ghisham.
  - Topics: Conservation Tax Easement Audit Technique Guide, Employer Tax Withholding Responsibilities, E-Services Authentication Process; ITIN Outreach - Path Act; Practitioner Data Breaches; Private Debt Collection; Reporting abusive tax promotions and/or promoters - LDC, Sharing Economy
- Thurs. May 4: Las Vegas, NV:
  - Congresswoman Dina Titus.
  - Topics: Collection User Fees, Field Audit (Exam), PDC, Online Payment Agreements, and Practitioner Data Breaches

Governmental Liaison - Congressional: Meetings at Federal level often in conjunction with the LTA. May include Congressional Roundtable events or topic-specific events.

- Wed, April 26: Philadelphia.PA.
  - Eastern PA TAS Local Taxpayer Advocates Brenda Lackey (Philadelphia East) and Victor Juarez (Philadelphia West) co-sponsor annual workshop for PA Congressional and Senatorial staff. Attendees are Congressional staff members who work in constituent services and interact with TAS.
  - SLF Topics: Data Breach, ID Theft, Secure Access Online Accounts, Payment Options, Tax Scheme Awareness and Small Business Week
- Thurs. April 27: St. Louis, MO.
  - Event is hosted by Danielle Douglass (STL LTA TP Advocate). Annual meeting with the Congressional Staff in Missouri. Representatives from the IRS Taxpayer Advocate Office, Stakeholder Liaison, and Appeals will present organizational information. Other presenters include the Low Income Tax Clinic.
  - SLF Topics: Dirty Dozen, Online Payment Agreements/Payment Options, Identity Theft and Phishing, PDC, Small Business Week



## **Communications and Liaison – Weekly Activity Report**

### **Week of May 1, 2017**

#### **Internal Communications**

##### IRS Headlines

- Tech Tip: Getting popups? These self-help steps can prevent network access lockout (IT)
- You make the call: Responding to taxpayer emails containing personally identifiable information (PGLD)
- Is it really the IRS calling? (W&I)
- Build your privacy knowledge, get training credits (PGLD)
- Seasonal employees can use pay statements when applying for unemployment benefits (HCO)
- Use the Elements of Training as a resource for learning (HCO)
- Press option 4 to reach the HR Connect Help Desk when calling the Operations Support Customer Assistance Line (HCO)

##### Leaders' Alert

- Submit documentation, not personnel action requests, when employees receive orders or attend training for military service (HCO)
- Document seasonal employees' requests to stay in non-pay status (HCO)
- Alert employees who use TTY/TDD to IT help desk change (IT)
- Separating Employee Clearance conference call for managers and proxies set for May 17 (HCO)
- Apply to Executive Readiness Program May 15-26 (HCO)
- Review travel vouchers for accuracy before you approve (CFO)

##### Poll questions

- Your chiropractor submits your visits to your insurance company as physical therapy. When you ask about it, they say it's to increase the number of covered sessions you can receive. This is potentially... (CI)

##### Spotlight

- Honing your hobby (W&I)
- Benefits of water (C&L)

##### Daily news (webbies)

- Prevent a spill, a slip and a hospital trip (AWSS)
- Reminder: Don't fall victim to phishing scams (IT)
- Enterprise Service Desk no longer supports TTY/TDD as of 4/30 (IT)

#### **Media Relations**

##### Potential news releases for this week:

- IRS accepting applications for 2018 LITC
- Small businesses urged to utilize WOTC
- Small businesses can benefit from research credit
- Deducting your home office
- IRS marks national military appreciation month

##### Potential releases for coming weeks:

- May 15 Tax Filing Reminder for Tax Exempt Orgs
- IRS Seeking applications for Volunteer Tax Assistance Programs
- Spring 2017 Statistics of Income Bulletin Now Available
- 2017 IRS Nationwide Tax Forums

### **National Public Liaison**

- Tue. May 9 and Wed. May 10 – Electronic Tax Administration Advisory Committee (ETAAC) meets for final working session before June 28 Public Meeting. IRS HQ or VIRTUAL.
- Thu. May 11 – AICPA IRS Practice and Procedures Committee Annual Meeting: 9 a.m. - LB&I Commissioner O'Donnell; 10 a.m. – W&I Commissioner Corbin; 11 a.m. – SBSE Commissioner Murphy; 1 p.m. – Appeals Deputy Commissioner Flax; 2 p.m. – OLS Director Mamo. 1155 F St., NW, Washington, D.C.
- Thu. May 11 – Sat. May 13 – American Bar Association Section of Taxation May Meeting. Various IRS and Chief Counsel speakers. Grand Hyatt.

### **Legislative Affairs**

Not an IRS Agency Record

### **UPCOMING HEARINGS:**

On Wednesday, May 3, 2017, a hearing is scheduled to be held before the House Committee on Oversight and Government Reform. The hearing will examine the cybersecurity incident that has affected the Data Retrieval Tool (DRT) and the information assurance practices of the FAFSA application. The hearing is scheduled for 9:30 am, in room 2154 of the Rayburn House Office Building.

Witnesses: Ken Corbin, Commissioner, Wage and Investment and Gina Garza, Chief Information Officer are scheduled to testify.

### **Social Media**

### **Visual Education and Communications**

#### **Internal Programs**

#### **1. Video to Desk-top – Live or Recorded Events:**

Chief Counsel: Tax Practice 1 – Live Stream (05/03)

Topic: Chief Counsel 2017 Tax Practice and Ethics Series - Tax Practice 1.

The Electronically Stored Information IVT will discuss E-discovery generally, Tax Court Rule 70, 72, 104 and Federal Rules of Civil Procedure 16, 26 and 37, the definition of records in the government, triggering events, what to preserve, computer based methods for searching, sanctions, Rule 37(e), logistical considerations, and Mock 26(f) conference with the Department of Justice.

Audience: All Chief Counsel attorneys and paralegals, maximum of 600 viewers.

Applications Development Town Hall – Polycom/Onstream (05/04)

Topic: Welcome new employees Highlights of FS 2017 Panel of Strategy team members will give an update Discussion on Dev Ops Employee awards.

Audience: ADs Internal/External Audience will include AD Employees and contractors. The approximate audience size is 1,950 employees. Sites include NCFB, Martinsburg, Austin, Dallas, Ogden and Detroit. Our contractors who work remotely will view via On-Stream. The audience will consist of software professionals who range in grades GS7-GS15, FLMs SMs and Executives.

#### **2. SABA Sessions (Captioning):**

EDI - David Fram: FMLA Overview and Overlap Issues (05/02)

Audience: IRS managers and employees from the Disability Office located in various PODs around the country  
Informational/Training

EDI - David Fram: Update ADA Reasonable Accommodation Issues (05/03)

Audience: IRS managers and employees from the Disability Office located in various PODs around the country  
Informational/Training

TEGE - CPE - Auditing Techniques (05/04)

Audience: IRS Employees  
Informational/Training

TEGE - CPE - Accounting Review (05/04)

Audience: IRS Employees  
Informational/Training

3. Other Projects: (i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)

English YouTube Tax Tips – FCP Edit (05/02, 05/04)

- Commercial Test

Avid Edit: Criminal Investigation (CI) Videos (05/01-05/04)

Chief Counsel Executive Taping (05/02)

Topic: Executive Intro for 2017 Ethics IVT

Audience: Chief Counsel Employees/Tax Attorneys

### **Stakeholder Liaison Field**

Small Business Forums:

- Mon., May 8, Baton Rouge, LA.
  - Congressman Garrett Graves
  - Topics: Changes to OIC Policy; Correspondence Exams; Field Audit Process; Payment Options and Other Online Tools; Private Debt Collection; Tax Scheme Awareness; Taxpayer Digital Communications (TDC); Identity Theft and Phishing, Online Payment Agreements; Sharing Economy
- Mon., May 8, Albuquerque, NM
  - Congresswoman Michelle Lujan Ghisham
  - Topics: Payment Options and Other Online Tools; Private Debt Collection; Tax Scheme Awareness; Taxpayer Digital Communications (TDC); Dirty Dozen; Identity Theft and Phishing; Practitioner Data Breaches.
- Fri., May 12, La Plata, MD
  - Congressman Steny Hoyer
  - Topics: Business Resources Forum
- Wed., May 17, Nashville, TN

- Congressman John Cooper and Congresswoman Marsha Blackburn
- Topics: Correspondence Exams; Field Audit Process; Payment Options and Other Online Tools; Private Debt Collection; Tax Scheme Awareness; Taxpayer Digital Communications (TDC); Dirty Dozen; Identity Theft and Phishing
- Thurs., May 18, Florence, SC
  - Congressman Tom Rice
  - Online Payment Agreements; Future State; Identity Theft and Phishing

Practitioner Liaison Meeting (PLMs):

- Wed., May 10, Birmingham, AL
  - Congresswoman Terri Fewell
  - Topics: Collection User Fees; Dirty Dozen; Online Payment Agreements
- Wed., May 10, Chicago, IL
  - Congressmen Danny Davis, Daniel Lipinski, Luis Gutierrez and Mike Quigley
  - Topics: Automated Underreporter Program (AUR); OIC; Correspondence Exams; Field Audit Process; Payment Options and Other Online Tools; EITC and Refundable Credits Returns; Private Debt Collection; Tax Scheme Awareness; Taxpayer Digital Communications (TDC)
- Wed., May 10, Sioux Falls, SD
  - Congresswoman Christy Noem
  - Topics: Correspondence Exams; Taxpayer Digital Communications (TDC); 5000A: Individual Shared Responsibility Provision; Collection User Fees; Direct Pay; Future State; Identity Theft and Phishing; Online Payment Agreements; Practitioner Data Breaches
- Thurs., May 11, Kansas City, MO
  - Congressman Emanuel Cleaver II
  - Topics: Correspondence Exams; Private Debt Collection; Direct Pay; Dirty Dozen; E-Services Authentication Process; Future State; Identity Theft and Phishing; Payment Options; Practitioner Data Breaches; Reporting abusive tax promotions and/or promoters
- Fri., May 12, Richmond, VA
  - Congressman Donald McEachin
  - Topics: Correspondence Exams; Private Debt Collection; Identity Theft and Phishing; Payment Options; Practitioner Data Breaches; ACA, AUR.
- Tues., May 16, Maitland, FL
  - Congresswoman Stephanie Murphy
  - Topics: Identity Theft and Phishing; Private Debt Collection
- Tues., May 16, Rochester, NY
  - Congresswoman Louise Slaughter
  - Topics: Collection User Fees; Dirty Dozen; Online Payment Agreements; Practitioner Data Breaches; Sharing Economy
- Tues., May 16, Brentwood, TN

- Congresswoman Marsha Blackburn and Congressman John Cooper
  - Topics: Automated Underreporter Program (AUR); Changes to OIC Policy; Correspondence Exams; Field Audit Process; Payment Options and Other Online Tools; Practitioners Filing Accurate EITC and Refundable Credits Returns; Private Debt Collection; Collection User Fees; Online Payment Agreements; Payment Options; Practitioner Data Breaches
- Thurs., May 18, Bethpage, NY
  - Congressmen Thomas Suozzi, Lee Zeldin, Pete King and Congresswoman Kathleen Rice
  - Topics: Collection User Fees; Dirty Dozen; Online Payment Agreements; Practitioner Data Breaches; Sharing Economy
- Thurs., May 18, Columbus, OH
  - Congresswoman Joyce Betty
  - Topics: Identity Theft and Phishing; Practitioner Data Breaches; Tax Security Awareness; Private Debt Collection
  - Exam and Collection will discuss how Identity Theft and Practitioner Data Breaches affects their programs

GL/SLF Coordinated Governmental Liaison - Congressional:

- Tues. May 9, Pittsburgh, PA (LTA Sponsored) (MR)
  - Congressmen Mike Kelly, Tim Murphy and Keith Rothfus
  - Western Pennsylvania Congressional Staff
  - Topics: Private Debt Collection

Practitioner Symposium/Working Together: These events feature IRS (including SLF) speakers as well as practitioner speakers on a variety of technical and procedural topics. Often these events are co-sponsored by one or more practitioner organizations.

- Thurs., May 11, Lincoln, NE
  - Congressman Jeff Hortenberry
  - Topics: Private Debt Collection; Collection User Fees; Leveraged SB Tax Workshops; New Entrepreneurs Initiative; Payment Options; Sharing Economy; Tax Security Awareness.

SLF Coordinated WebConference: These events are SLF nationwide events virtually held to impact either practitioner groups or industry organizations.

- Thurs. May 11, Nationwide.
  - Topics: Correspondence Exams
- Thurs. May 18, Nationwide.
  - Topics: Automated Underreporter Program

# **Communications and Liaison – Weekly Activity Report**

## **Week of May 8, 2017**

### **Internal Communications**

#### IRS Headlines

- Sign up for the Worklife and Wellness Newsletter (HCO)
- Add multiple email addresses to Employee Personal Page (HCO)
- Double check, validate your time and attendance in SETR (HCO)

#### Leaders' Alert

- Promptly complete separation actions when employees leave IRS (HCO)

#### Poll Questions

- IRS.gov can be viewed in how many Asian languages? (EDI)
- Which IRWeb feature highlights letters from taxpayers where employees or teams made a difference? (C&L)

#### Spotlight

- There's honor in public service (Public Service Recognition Week) (W&I)
- Honoring our military (National Military Appreciation Month) (Multiple)

#### Webbie

- Send an e-Card or Shout Out! to thank your colleagues during Public Service Recognition Week (HCO)

### **Media Relations**

#### Potential news releases for this week:

- May 15 tax filing reminder for tax exempt orgs
- IRS reminds taxpayers to prepare for disasters/hurricanes

#### Potential releases for coming weeks:

- IRS marks national military appreciation month
- Spring 2017 statistics of income bulletin now available

### **National Public Liaison**

Tue. May 9 – Reporting Agent Forum at NCFB.

Tue. May 9 and Wed. May 10 – Electronic Tax Administration Advisory Committee (ETAAC) meets for final working session before June 28 Public Meeting. IRS HQ.

Tue. May 9, 2 p.m. ET – OPR Director Steve Whitlock discusses “Ethics and Standards for Tax Practitioners – Circular 230 Overview” on Tax Talk Today. Other guests include Roger Harris, Padgett Business Services, and Kevin Huston, Blue Ridge Tax Advisors.

Wed. May 10, 1 p.m. – Monthly Outreach and Education call.

Thu. May 11 – NCCPAP Annual Courtesy Meeting at IRS HQ.

Thu. May 11 – AICPA IRS Practice and Procedures Committee Annual Meeting: - 9 a.m. LB&I Commissioner O'Donnell; 10 a.m. – W&I Commissioner Corbin; 11 a.m. – SBSE Commissioner Murphy; 1 p.m. – Appeals Deputy Commissioner Flax; 2 p.m. – OLS Director Mamo. 1155 F St., NW, Washington, D.C.

Thu. May 11 – Sat. May 13 – American Bar Association Section of Taxation May Meeting. OPR Director Whitlock, SBSE Deputy Commissioner Ripperda and other IRS and Chief Counsel speakers. National Taxpayer Advocate Nina Olsen receives ABA's Distinguished Service Award. Grand Hyatt.

Thu. May 18 – CERCA Spring Conference. Commissioner Koskinen, W&I Commissioner Corbin, RICS Director Beebe, Online Services Director Mamo and ISAC Executive Egaas speak. Marriott Crystal Gateway, Arlington.

### **Legislative Affairs**

Not an IRS Agency Record





## UPCOMING HEARINGS:

Currently, there are no hearings scheduled.

## **Social Media**

### FRONT PAGE

Featured Video: Disaster

Rotating Spotlight:

- Mon changes:
  - Replace “Small Business Week” with “After Deadline”
  - Update “Tax Exempt” spotlight with deadline reminder
- Wed changes:
  - Replace “After Deadline” with “Disaster”

News section

- Mon change: Tax Forums replace PDC

### TWITTER

Topics include:

- Disasters
- LITC grants
- Tax Forums
- Military Appreciation (possible)
- EO May 15 Deadline
- After Deadline Messages: WMR, IRS letter, 1040X, OIC, etc.
- EIN

### FB/TUMBLR

Featured video: “Disaster”

Add tab: Get IRS info for FAFSA

## **Visual Education and Communications**

### Internal Programs

#### 1. Video to Desk-top – Live or Recorded Events:

Chief Counsel: Tax Practice 1 – Rebroadcast (05/10)

Tax Practice 1 Rebroadcast – May 10

Topic: Chief Counsel 2017 Tax Practice and Ethics Series - Tax Practice 1.

The Electronically Stored Information IVT will discuss E-discovery generally, Tax Court Rule 70, 72, 104 and Federal Rules of Civil Procedure 16, 26 and 37, the definition of records in the government, triggering events, what to preserve, computer based methods for searching, sanctions, Rule 37(e), logistical considerations, and Mock 26(f) conference with the Department of Justice.

Audience: All Chief Counsel Attorneys and paralegals, maximum of 600 viewers.

2017 Commissioner's Award Program @1111-Polycom/Stream (05/11)

Topic: Presentation of Commissioner's Awards to off-site participants.

Audience: Estimated 700 online participants

Chief Counsel: Tax Practice 2 – Live Stream (05/11)

Tax Practice 2 – May 11

Tax Practice 2 Rebroadcast – May 17

Topic: Chief Counsel 2017 Tax Practice and Ethics Series - Tax Practice 2.

Program will cover updates on amendments to the Federal Rules of Civil Procedure; Law of the Case Doctrine; Rule of mandate; re-hearings at the appellate level; discovery; Jurisdiction when notice mailed before the actual date listed on the notice; venue for appeals from decisions of the Tax Court; Section 7482(b), the Golsen Rule, prior opportunity to dispute such tax liability in a CDP case; and dismissal of standalone innocent spouse case without entering a decision.

Audience: All Chief Counsel Attorneys and Paralegals, maximum of 600 viewers.

2. SABA Sessions (Captioning):

Appeals - Appeals Connected! Virtual Town Hall (05/09)

Audience: All employees will be invited to this event. We have roughly 1,400 employees

Informational/Training

LBI - EEO Compliance (05/09)

Audience: LB&I Employees and Managers

Informational/Training

HCO - Division Leaders Chat: Strategy, Finance & Engagement (05/10)

Audience: This session is open to all HCO employees

Informational/Training

IT Connections Hour: Employee Engagement (05/11)

Audience: The audience is Information Technology employees (all grade levels) and managers who are located nationwide

Informational/Training

3. Other Projects: *(i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)*

Avid Edit - PGLD UNAX 2017 Training Video (05/08-5/10)

Avid Edit: Criminal Investigation (CI) Videos (05/09-05/11)

Avid Edit: Records Management Voiceover (05/08-05/12)

4. Servicewide Video Editorial Board (SVEB) – Internal:

Request VR#562 – RAAS All Employee Meetings via Webcast

Target Audience: Internal, all RAAS employees. The audience will also include new employees, and senior level employees. The audience size is approximately 300 employees. All but one of the employees is a RAAS employee; the one non-RAAS IRS employee is Bruce Nolan who will help as facilitator. Of the 300 employees, 45 are traveling and 265 are local (from K St or Main IR POD). Approximately 12 employees will participate from their computers via the live streaming. Per RAAS: “12 are planned but I imagine that a few more may ultimately attend via webcast if they can’t travel last minute, can’t be away from home, are sick, other reasons that may make getting to DC difficult for some handful of people.”

Informational message

## **Stakeholder Liaison Field**

### Small Business Forums (SBFs)

(Congressional members named FYI only. They do not attend)

- Mon., May 8, Baton Rouge, LA.
  - Congressman Garrett Graves
  - Topics: Changes to OIC Policy; Correspondence Exams; Field Audit Process; Payment Options and Other Online Tools; Private Debt Collection; Tax Scheme Awareness; Taxpayer Digital Communications (TDC); Identity Theft and Phishing, Online Payment Agreements; Sharing Economy  
CEC
- Mon., May 8, Albuquerque, NM (GT)
  - Congresswoman Michelle Lujan Ghisham
  - Topics: Payment Options and Other Online Tools; Private Debt Collection; Tax Scheme Awareness; Taxpayer Digital Communications (TDC); Dirty Dozen; Identity Theft and Phishing; Practitioner Data Breaches.
- Fri., May 12, La Plata, MD (DY)
  - Congressman Steny Hoyer
  - Topics: Business Resources Forum
  - Topics: Identity Theft and Phishing; New Entrepreneurs & Schedule C Initiative; Independent Contractor or Employee; Employer Tax Withholding Responsibilities/Issues; Payment Options; Collection User Fees; Sharing Economy
- Wed., May 17, Nashville, TN
  - Congressman John Cooper and Congresswoman Marsha Blackburn
  - Topics: Correspondence Exams; Field Audit Process; Payment Options and Other Online Tools; Private Debt Collection; Tax Scheme Awareness; Taxpayer Digital Communications (TDC); Dirty Dozen; Identity Theft and Phishing  
CEC
- Thurs., May 18, Florence, SC (DY)
  - Congressman Tom Rice
  - Online Payment Agreements; Future State; Identity Theft and Phishing

### Practitioner Liaison Meeting (PLMs)

(Congressional members named FYI only. They do not attend)

- Wed., May 10, Birmingham, AL
  - Congresswoman Terri Fewell
  - Topics: Collection User Fees; Dirty Dozen; Online Payment Agreements  
Collection User Fees; Dirty Dozen; Online Payment Agreements  
CEC
- Wed., May 10, Chicago, IL
  - Congressmen Danny Davis, Daniel Lipinski, Luis Gutierrez and Mike Quigley
  - Topics: Automated Underreporter Program (AUR); OIC; Correspondence Exams; Field Audit Process; Payment Options and Other Online Tools;

EITC and Refundable Credits Returns; Private Debt Collection; Tax Scheme Awareness; Taxpayer Digital Communications (TDC)

CEC

- Wed., May 10, Sioux Falls, SD (KW)
  - Congresswoman Christy Noem
  - Topics: Correspondence Exams; Taxpayer Digital Communications (TDC); 5000A: Individual Shared Responsibility Provision; Collection User Fees; Direct Pay; Future State; Identity Theft and Phishing; Online Payment Agreements; Practitioner Data Breaches
- Thurs., May 11, Kansas City, MO
  - Congressman Emanuel Cleaver II
  - Topics: Correspondence Exams; Private Debt Collection; Direct Pay; Dirty Dozen; E-Services Authentication Process; Future State; Identity Theft and Phishing; Payment Options; Practitioner Data Breaches; Reporting abusive tax promotions and/or promoters

CEC
- Fri., May 12, Richmond, VA (DY)
  - Congressman Donald McEachin
  - Topics: Correspondence Exams; Private Debt Collection; Identity Theft and Phishing; Payment Options; Practitioner Data Breaches; ACA, AUR.
- Tues., May 16, Maitland, FL (GT)
  - Congresswoman Stephanie Murphy
  - Topics: Identity Theft and Phishing; Private Debt Collection
- Tues., May 16, Rochester, NY (DY)
  - Congresswoman Louise Slaughter
  - Topics: Collection User Fees; Dirty Dozen; Online Payment Agreements; Practitioner Data Breaches; Sharing Economy
- Tues., May 16, Brentwood, TN
  - Congresswoman Marsha Blackburn and Congressman John Cooper
  - Topics: Automated Underreporter Program (AUR); Changes to OIC Policy; Correspondence Exams; Field Audit Process; Payment Options and Other Online Tools; Practitioners Filing Accurate EITC and Refundable Credits Returns; Private Debt Collection; Collection User Fees; Online Payment Agreements; Payment Options; Practitioner Data Breaches

CEC
- Thurs., May 18, Bethpage, NY (DY)
  - Congressmen Thomas Suozzi, Lee Zeldin, Pete King and Congresswoman Kathleen Rice
  - Topics: Collection User Fees; Dirty Dozen; Online Payment Agreements; Practitioner Data Breaches; Sharing Economy
- Thurs., May 18, Columbus, OH (KW)
  - Congresswoman Joyce Betty
  - Topics: Identity Theft and Phishing; Practitioner Data Breaches; Tax Security Awareness; Private Debt Collection

- Exam and Collection will discuss how Identity Theft and Practitioner Data Breaches affects their programs

GL/SLF Coordinated Governmental Liaison - Congressional:

- Tues. May 9, Pittsburgh, PA (LTA Sponsored) (MR)
  - Congressmen Mike Kelly, Tim Murphy and Keith Rothfus
  - Western Pennsylvania Congressional Staff
  - Topics: Private Debt Collection

Practitioner Symposium/Working Together: These events feature IRS (including SLF) speakers as well as practitioner speakers on a variety of technical and procedural topics. Often these events are co-sponsored by one or more practitioner organizations. (Congressional members named FYI only. They do not attend)

- Thurs., May 11, Lincoln, NE
    - Congressman Jeff Hortenberry
    - Topics: Private Debt Collection; Collection User Fees; Leveraged SB Tax Workshops; New Entrepreneurs Initiative; Payment Options; Sharing Economy; Tax Security Awareness.
- CEC

SLF Coordinated WebConference: These events are SLF nationwide events virtually held to impact either practitioner groups or industry organizations.

- Thurs. May 11, Nationwide.
  - Topics: Correspondence Exams *DG*
- Thurs. May 18, Nationwide.
  - Topics: Automated Underreporter Program *DG*

# **Communications and Liaison – Weekly Activity Report**

## **Week of May 15, 2017**

### **Internal Communications**

#### Headlines

- Do you need to adjust your tax withholding? (HCO)
- Strategic Plan priorities survey: Results so far show confidence in goals and objectives (CFO)
- Tips for seasonal employees going into nonpay status (HCO)
- Do you have Thrift Savings Plan questions? (HCO)
- Self-Help Online Tutorials provide just-in-time help in three minutes or less (HCO)
- Know the policy on participating in training events (HCO)

#### Leaders' Alert

- Employees may qualify for additional emergency military leave (HCO)
- HR Connect to get an upgrade; submit your personnel action requests timely (HCO)
- Ensure employees' compensatory time earned and used for travel is reported accurately (HCO)
- Apply to Executive Readiness Program by May 26 (HCO)

#### Poll Question

- Which is an Employee Resource Group (ERG) that promotes a culture of inclusion, openness and collaboration among the IRS's next generation of leaders? (C&L)

#### Spotlight

- Safe and secure (Building Safety Month) C&L

#### Webbie

- EDI joins Deputy Commissioner for Operations Support organization (EDI)

### **Media Relations**

#### Potential news releases for this week:

- IRS marks national military appreciation month
- Get transcript feature available in online accounts

#### Potential releases for coming weeks:

- Now available spring 2017 statistics of income bulletin
- IRS appeals program pilots virtual service
- Tax professionals can earn CPE credits at the 2017 IRS nationwide tax forums

### **National Public Liaison**

Thu. May 18, 8:30 – 12 noon – NPL Monthly Practitioner Meeting. Agenda highlights: Cybersecurity issues: Michael Anthony; OPR update, Steve Whitlock.

Thu. May 18 – CERCA Spring Conference. Commissioner Koskinen, W&I Commissioner Corbin, RICS Director Beebe, Online Services Director Mamo and ISAC Executive Egaas speak. Marriott Crystal Gateway, Arlington.

Thu. May 18, 7 p.m. – NAEA May Meeting – NPL Director Mel Hardy speaks at officer installation. Hyatt Crystal City.

Tue. May 23, Wed. May 24 – Internal Revenue Service Advisory Council (IRSAC) working session at IRS headquarters.

Tues. May 23 – Small Business Forum @ NFIB – Mark Gillen and Jeff Wallbaum are attending the forum to discuss Future State with key small business industry parnters.

**Legislative Affairs**

Not an IRS Agency Record



## UPCOMING HEARINGS:

Currently, there are no hearings scheduled.

## **Social Media**

### FRONT PAGE

Featured Video: Replace “Preparing for Disaster” with “Military Tax Tips”

Rotating Spotlight:

- Mon changes:
  - Replace “After Deadline” with Military Appreciation: NR; Mil Center; Veterans (Thru 5/23)
- Tue changes:
  - Update “Tax Exempt” spotlight replacing the 5/15 deadline reminder with Select Check

News section

- Mon change: Disasters replace After the Deadline

VIDEO TIP (List Serv): “Military Tax Tips”

### TWITTER

Topics include:

- EO May 15 Deadline (*thru Mon*)
- Tips for taxpayers who owe *\*New*
- Get Transcript feature – online accounts (*potential: depending on NR*)
- Understanding your notice (*potential: depending on WI response*)
- LITC grant applications; IRPAC applications (thru 5/21 deadline)
- Military appreciation month
- Disaster preparation
- Tax Forums
- After Deadline Messages: WMR, IRS letter, 1040X, OIC, etc.
- Business Tips: Tax Centers, EIN

FB/TUMBLR/YT

Featured video: “Military Tax Tips”

## **Visual Education and Communications**

### Internal Programs

#### 1. Video to Desk-top – Live or Recorded Events:

Innovation Seminar – Polycom/Streaming/SABA (05/16)

Topic: Paul Mamo, Director, Office of Online Services will facilitate a panel discussion on the latest news about Taxpayer Digital Communications and Online Accounts.



Audience: All IRS Employees

RAAS All Hands Meeting @1111 – Live Stream (05/17)

Topic: The purpose of the meeting is to bring everyone together in person, to build our new organization. The meeting will include: A Town Hall with Ben Herndon and the Division Directors; Presentations about RAAS' role in the IRS Future State; current RAAS projects; the roles and missions of RAAS Divisions; Interactive networking sessions; and Division-specific break-out sessions.

Audience: Many of the participants perform research, analytics, mathematical, and economic duties, as well as various other duties. Some are new employees, however most are senior level employees.

Chief Counsel: Tax Practice 2 – Rebroadcast Live Stream (05/17)

Tax Practice 2 – May 11

Tax Practice 2 Rebroadcast – May 17

Topic: Chief Counsel 2017 Tax Practice and Ethics Series - Tax Practice 2.

Program will cover updates on amendments to the Federal Rules of Civil Procedure; Law of the Case Doctrine; Rule of mandate; re-hearings at the appellate level; discovery; Jurisdiction when notice mailed before the actual date listed on the notice; venue for appeals from decisions of the Tax Court; Section 7482(b), the Golsen Rule, prior opportunity to dispute such tax liability in a CDP case; and dismissal of standalone innocent spouse case without entering a decision.

Audience: All Chief Counsel Attorneys and Paralegals, maximum of 600 viewers.

Chief Counsel: Tax Practice 3 – Live Stream (05/18)

Tax Practice 3 – May 18

Tax Practice 3 Rebroadcast – May 25

Ethics – May 24

Ethics Rebroadcast – June 1 – 12:30pm -3:00pm EST (PER UNION)

Ethics Rebroadcast – June 5 – 11:00am -1:30pm EST (PER UNION)

Topic: Chief Counsel 2017 Tax Practice and Ethics Series - Tax Practice 3.

Program will cover Passport Program with Laurence K. Williams, Chris Jones Thomas M. Rath, Lisa Lafferty and Private Debt Collection with Francis M. McCormick, Jason Bremer, Aaron D. Gregory and Whistleblower with Kevin Gillin Robert T. Wearing.

Audience: All Chief Counsel Attorneys and paralegals, maximum of 600 viewers.

## 2. SABA Sessions (Captioning):

BFC - CFO FM Virtual Conference (05/16)

Informational/Training

OLS - LSR Demo for OLS (05/17)

Audience: Participants are majority managers and program analysts (Series GS-343-01s and GS-301s (Grades 12 thru 15). Majority of participants are located in the Washington, D.C. area. Current knowledge of audience ranges from Project Management to Web Producers.

Informational/Training

LBi - No transcript - High Value Services: Technical and Marketing Services - Inbound (05/17)

Audience: LB&I Employees

Informational/Training

HCO - Leadership Behavior Session (05/18)

Audience: The session is for employees that wish to become managers or advance in management. It includes managers, Leadership Succession Review participants at all grade levels.

Informational/Training

LBI - No transcript - Auditor's Workbench Transfer Pricing/GELU (05/18)

Audience: LB&I Employees

Informational/Training

TEGE - FY17 TEGE CPE, Rules of Evidence in Tax Court (05/18)

Audience: IRS Employees

Informational/Training

3. Other Projects: *(i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)*

ASL EDI Mandatory Briefings Taping (05/16-05/18)

Topic: 2017 EDI Mandatory Briefings Video Pilot Project to include ethics, privacy, PIPD and records management.

Audience: IRS deaf and hard of hearing employees

Avid Edit: 2017 Commissioner's Award Program (05/16-05/17)

Avid Edit: ASL Mandatory Briefing Project (05/17-05/19)

Avid Edit: Chief Counsel (CC) Managers Opening (05/17)

Criminal Investigation (CI) Video Taping (05/18-05/19)

4. Servicewide Video Editorial Board (SVEB) – Internal:

Request VR#563 – TAS Videos: Most Litigated Issues

Target Audience: Internal - all TAS employees nationwide.

Employee Training

Request VR#564 – Deputy Commissioner Awards Joint Ceremony 2017

Target Audience: Internal audience – IRS employees

Informational message

### **Stakeholder Liaison Field**

#### **Small Business Forums (SBF's)**

(Congressional members named FYI only. They do not attend)

- Wed., May 17, Nashville, TN (Virtual) - **CEC**
  - Congressman John Cooper and Congresswoman Marsha Blackburn
  - Topics: Correspondence Exams; Field Audit Process; Payment Options and Other Online Tools; Private Debt Collection; Tax Scheme Awareness; Taxpayer Digital Communications (TDC); Dirty Dozen; Identity Theft and Phishing
- Thurs., May 18, Florence, SC (F2F) - **DRY**
  - Congressman Tom Rice

- Online Payment Agreements; Future State; Identity Theft and Phishing
- Tues., May 23, Columbia, SC. - **DRY**
  - Congressmen Joe Wilson and James Clayburn
  - Topics: Collection User Fees; Future State; Identity Theft and Phishing; Online Payment Agreements
- Tues., May 23, Orlando, FL. **edl**
  - Congresswoman Stephanie Murphy and Congressman Ron Desantis
  - Topics: Future State; Identity Theft and Phishing
- Thurs., May 25, Indianapolis, IN. (Virtual) **SER**
  - Congressmen Andre' Carson ,Todd Rokita, Luke Messer, and Congresswoman Susan Brooks
  - Topics: Private Debt Collection; Identity Theft and Phishing; New Entrepreneurs Initiative; Sharing Economy

### **Practitioner Liaison Meeting (PLM's)**

(Congressional members named FYI only. They do not attend)

- Tues., May 16, Maitland, FL (F2F) **edl**
  - Congresswoman Stephanie Murphy
  - Topics: Identity Theft and Phishing; Private Debt Collection
- Tues., May 16, Rochester, NY (F2F) - **DRY**
  - Congresswoman Louise Slaughter
  - Topics: Collection User Fees; Dirty Dozen; Online Payment Agreements; Practitioner Data Breaches; Sharing Economy, Private Debt Collection
- Tues., May 16, Brentwood, TN (F2F) - **CEC**
  - Congresswoman Marsha Blackburn and Congressman John Cooper
  - Topics: Automated Underreporter Program (AUR); Changes to OIC Policy; Correspondence Exams; Field Audit Process; Payment Options and Other Online Tools; Practitioners Filing Accurate EITC and Refundable Credits Returns; Private Debt Collection; Collection User Fees; Online Payment Agreements; Payment Options; Practitioner Data Breaches
- Thurs., May 18, Bethpage, NY (F2F) - **DRY**
  - Congressmen Thomas Suozzi, Lee Zeldin, Pete King and Congresswoman Kathleen Rice
  - Topics: Collection User Fees; Dirty Dozen; Online Payment Agreements; Practitioner Data Breaches; Sharing Economy
- Thurs., May 18, Columbus, OH (F2F and Virtual) **SER**
  - Congresswoman Joyce Betty
  - Topics: Identity Theft and Phishing; Practitioner Data Breaches; Tax Security Awareness; Private Debt Collection
  - Exam and Collection will discuss how Identity Theft and Practitioner Data Breaches affects their programs
- Tues., May 23, El Monte, CA
  - Congressman David Valadao and Congresswoman Grace Napolitano
  - Topics: Future State; Identity Theft and Phishing; New Secure Access Process for Get Transcript

- Wed., May 24, Troy, MI (F2F and Virtual) **SER**
  - Congressmen Dave Trott, John Conyers, Jr and Congresswomen Debbie Dingell and Brenda Lawrence
  - Topics: Private Debt Collection, Practitioner Data Breaches, Identity Theft & Phishing
- Thurs., May 25, Philadelphia, PA (F2F and Virtual) MAR
  - Congressmen Lloyd Smucker, Robert Brady, Dwight Evans, Ryan Costello, and Mike Kelly
  - Topics: Payment Options; Practitioner Data Breaches; Tax Security Awareness, Private Debt Collection

### **Practitioner Symposium/Working Together**

(Congressional members named FYI only. They do not attend)

- Wed., May 24, Malvern, PA (F2F) MAR
  - Congressmen Lloyd Smucker, Robert Brady, Dwight Evans, Ryan Costello, and Mike Kelly
  - Topics: Automated Underreporter Program (AUR); Changes to OIC Policy; Correspondence Exams; Field Audit Process; Payment Options and Other Online Tools; Practitioners Filing Accurate EITC and Refundable Credits Returns; Private Debt Collection; Tax Scheme Awareness; Appeals Judicial Approach and Culture (AJAC); Identity Theft and Phishing; New Secure Access Process for Get Transcript; Online Payment Agreements; Practitioner Data Breaches; Practitioner Priority Service

**SLF Coordinated WebConference:** These events are SLF nationwide events virtually held to impact either practitioner groups or industry organizations.

- Thurs. May 18, Nationwide.
  - Topics: Automated Underreporter Program

## **Communications and Liaison – Weekly Activity Report Week of May 22, 2017**

### **Internal Communications**

#### Headlines

- New features available when you view your tax account (W&I)
- HR Connect gets an upgrade this summer (HCO)
- If you're retiring soon, use the new retirement application tool (HCO)
- Treasury is requesting your feedback (Treasury)

#### Leaders' Alert

- Outlook upgrade will automate much of the email records management process (PGLD)

#### Other News

- Being a CSR is a calling (W&I)

#### Poll Question

- Whom do you call if you can't reset your HR Connect password? (HCO)
- Which program allows for a secure online exchange of information with the IRS and taxpayers without the use of special software? (C&L)

#### Spotlight

- Summer staycation (C&L)

#### Webbie

- Treasury Leadership Legacy Honors go to 15 IRS executive and senior managers (HCO)
- SharePoint will have limited access Memorial Day weekend (IT)
- Be the Terminator – say hasta la vista to workplace hazards (AWSS)
- Be prepared for emergencies that may require you to shelter in place (AWSS)

### **Media Relations**

#### Potential news releases for this week:

- Now available spring 2017 statistics of income bulletin
- New features available in online accounts
- Tax professionals can earn CPE credits at the 2017 IRS nationwide tax forums

#### Potential releases for coming weeks:

- N/A

### **National Public Liaison**

Tue. May 23 – Small Business Forum @ NFIB – Mark Gillen and Jeff Wallbaum are attending the forum to discuss Future State with key small business industry partners. New partners from the Small Business Administration will attend the meeting.

### **Legislative Affairs**

Not an IRS Agency Record

## UPCOMING HEARINGS:

Currently, there are no hearings scheduled.

## **Social Media**

### FRONT PAGE

Featured Video: Replace “Military Tax Tips” with Part-Time and Summer Jobs  
Rotating Spotlight:

- Replace “After Deadline” with Military Appreciation: NR; Mil Center; Veterans (if NR is issued)

News section

- New features available in online accounts (if NR is issued)

VIDEO TIP (List Serv): “Summer Jobs”

### TWITTER

Topics include:

- Understanding your notice *\*New*
- IRS Publications (*potential*)
- Tips for taxpayers who owe
- Tax Forums
- Student Loan tax info – FAFSA (*pinned tweet*)
- Business Tips: Tax Centers
- Get Transcript feature – online accounts (*potential: depending on NR*)
- Military appreciation month
- After Deadline Messages: WMR, IRS letter, 1040X, OIC, etc.

FB/TUMBLR/YT

Featured video: “Summer Jobs”

## **Visual Education and Communications**

### Internal Programs

#### 1. Video to Desk-top – Live or Recorded Events:

Live Stream - Chief Counsel: Ethics (05/24)

Ethics – May 24

Ethics Rebroadcast – June 1 – 12:30pm -3:00pm EST (PER UNION)

Ethics Rebroadcast – June 5 – 11:00am -1:30pm EST (PER UNION)

Topic: Chief Counsel 2017 Tax Practice and Ethics Series - Ethics.

Program will cover Ethics on May 24 with Kenneth W. Gaul, David Taube, Hilary March Hap Trice, Emily Lesniak, Michael Franklin and Vikramsing Barad.  
Audience: All Chief Counsel Attorneys and paralegals, maximum of 600 viewers.

Chief Counsel: Tax Practice 3 – Rebroadcast Live Stream (05/25)

Tax Practice 3 – May 18

Tax Practice 3 Rebroadcast – May 25

Ethics – May 24

Ethics Rebroadcast – June 1 – 12:30pm -3:00pm EST (PER UNION)

Ethics Rebroadcast – June 5 – 11:00am -1:30pm EST (PER UNION)

Topic: Chief Counsel 2017 Tax Practice and Ethics Series - Tax Practice 3.

Program will cover Passport Program with Laurence K. Williams, Chris Jones

Thomas M. Rath, Lisa Lafferty and Private Debt Collection with Francis M.

McCormick, Jason Bremer, Aaron D. Gregory and Whistleblower with Kevin Gillin

Robert T. Wearing.

Audience: All Chief Counsel Attorneys and paralegals, maximum of 600 viewers.

## 2. SABA Sessions (Captioning):

LBi - No Transcript - Direct, Indirect and Constructive Ownership Rules for International Information Returns (05/22)

Audience: LB&I Employees

Informational/Training

SBSE - Virtual Leadership and Collaboration (05/23)

Audience: All levels of managers in SBSE Operations Support. About 80 managers total. Most managers are highly experienced. Examples of grade and series: IR-340-1 and IR-343-4. There will be unscripted discussion and questions throughout the presentations.

Informational/Training

LBi - NO TRANSCRIPT - EEO Compliance for Managers (05/23)

Audience: LB&I Employees and Managers

Informational/Training

SBSE - Change the Constant (05/23)

Audience: All levels of managers in SBSE Operations Support. About 80 managers total. Most managers are highly experienced. Examples of grade and series: IR-340-1 and IR-343-4. There will be unscripted discussion and questions throughout the presentations.

Informational/Training

SBSE - The Role of a Customer Service Operation (05/24)

Audience: All levels of managers in SBSE Operations Support. About 80 managers total. Most managers are highly experienced. Examples of grade and series: IR-340-1 and IR-343-4. There will be unscripted discussion and questions throughout the presentations.

Informational/Training

TEGE - Audit Hour - May 2017 (05/24)

Audience: IRS Employees

Informational/Training

SBSE - How to Create Performance Plans and Set Performance Expectations (05/24)

Audience: All levels of managers in SBSE Operations Support. About 80 managers total. Most managers are highly experienced. Examples of grade and series: IR-340-1 and IR-343-4. There will be unscripted discussion and questions throughout the presentations.

Informational/Training

TEGE - FSLG - Back to Basics Pt 3 - Preparing Lead Sheets & Workpapers (05/25)

Audience: IRS Employees

Informational/Training

3. Other Projects: *(i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)*

Avid Edit: ASL Mandatory Briefing Project (05/22-05/25)

Criminal Investigation (CI) Senior Leadership Media Training Taping @1111 (05/23-05/24)

Topic: This is a quarterly visit by 1/3 of CI's most senior leaders from around the country. We would like to take advantage of the opportunity to conduct media training in the scenario. For this visit, we will only be conducting one scenario, a stand-up TV interview. CI personnel will act as the media members and ask questions.

Audience: CI SACs and ASACs--most senior leaders in the field.

Avid Edit: Criminal Investigation (CI) YouTube Videos (05/23-05/26)

External Programs

1. Servicewide Video Editorial Board (SVEB) – External:

- YouTube Request VR#140 – Can't pay all the tax you owe? Consider a Payment Plan  
Target Audience: External taxpayers  
Informational message
- Request VR#565 – National Tax Forums Video  
Target Audience: External, audience of tax practitioners across five trade shows. The Audience size of up to 1500 at each of 5 locations.  
Informational message
- Request VR#566 – TEGE Captivate Video - Individual Indian Tax Issues – Tip Compliance  
Target Audience: External, members of Indian Tribal Governments, Per POC: "ITG has a video series entitled "Individual Indian Tax Issues..." posted under the "Tribes" index on the IVP. Therefore, although intended for tribal members, it is available for anyone to view: <https://www.tax.gov/Governments/Tribes>  
Informational message
- Request VR#567 – TEGE Captivate Video - Individual Indian Tax Issues – Self-Employed  
Target Audience: External, members of Indian Tribal Governments, Per POC: "ITG has a video series entitled "Individual Indian Tax Issues..." posted under the "Tribes" index on the IVP. Therefore, although intended for tribal members, it is available for anyone to view - <https://www.tax.gov/Governments/Tribes>  
Informational message



## **Stakeholder Liaison Field**

### **Small Business Forums (SBF's)**

(Congressional members named FYI only. They do not attend)

- Tues., May 23, Columbia, SC (F2F)
  - Congressmen Joe Wilson and James Clyburn
  - Topics: Collection User Fees; Future State; Identity Theft and Phishing; Online Payment Agreements
- Tues., May 23, Orlando, FL (F2F)
  - Congresswoman Stephanie Murphy and Congressman Ron Desantis
  - Topics: Future State; Identity Theft and Phishing
- Thurs., May 25, Indianapolis, IN (Virtual). Event for MI & OH stakeholders
  - All Congress persons for the States of Michigan and Ohio
  - Topics: Private Debt Collection; Identity Theft and Phishing; New Entrepreneurs Initiative; Sharing Economy

### **Practitioner Liaison Meeting (PLM's)**

(Congressional members named FYI only. They do not attend)

- Tues., May 23, El Monte, CA (F2F)
  - Congressman David Valadao and Congresswoman Grace Napolitano
  - Topics: Future State; Identity Theft and Phishing; New Secure Access Process for Get Transcript
- Wed., May 24, Troy, MI (F2F and Virtual)
  - Congressmen Dave Trott, John Conyers, Jr and Congresswomen Debbie Dingell and Brenda Lawrence
  - Topics: Private Debt Collection, Changes in OIC Policy, Practitioner Data Breaches, Tax Schemes Awareness, Overview of Field Audit Process
- Thurs., May 25, Philadelphia, PA (F2F and Virtual)
  - Congressmen Lloyd Smucker, Robert Brady, Dwight Evans, Ryan Costello, and Mike Kelly
  - Topics: Payment Options; Practitioner Data Breaches; Tax Security Awareness
- Thurs., June 1, Tampa, FL (F2F)
  - Congresswoman Kathy Castor, Congressman Dennis Ross and Charlie Christ
  - Topics: Changes to OIC Policy; Practitioners Filing Accurate EITC/Refundable Credits Returns; Private Debt Collection; Tax Scheme Awareness
- Thurs., June 1, San Bernardino, CA (F2F)
  - Congressman Pete Aguilar and Congresswoman Grace Napolitano
  - Topics: Practitioner Data Theft; Private Debt Collection; Taxpayer Digital Communication; OIC Policy Change

### **Practitioner Symposium/Working Together**

(Congressional members named FYI only. They do not attend)

- Wed., May 24, Malvern, PA (F2F)
  - Congressmen Lloyd Smucker, Robert Brady, Dwight Evans, Ryan Costello, and Mike Kelly
  - Topics: Automated Underreporter Program (AUR); Changes to OIC Policy; Correspondence Exams; Field Audit Process; Payment Options and Other Online Tools; Practitioners Filing Accurate EITC and Refundable Credits Returns; Private Debt Collection; Tax Scheme Awareness; Appeals Judicial Approach and Culture (AJAC); Identity Theft and Phishing; New Secure Access Process for Get Transcript; Online Payment Agreements; Practitioner Data Breaches; Practitioner Priority Service
- Thurs., June 1, Glassboro, NJ (F2F)
  - Congressman Donald NoCross
  - Topics: Automated Underreporter Program (AUR); Changes to OIC Policy; Correspondence Exams; Field Audit Process; Payment Options and Other Online Tools; Practitioners Filing Accurate EITC and Refundable Credits Returns; Private Debt Collection; Tax Scheme Awareness; Appeals Judicial Approach and Culture (AJAC); Identity Theft and Phishing; New Secure Access Process for Get Transcript; Online Payment Agreements; Practitioner Data Breaches; Practitioner Priority Service

#### **Other Stakeholder Liaison Field Events**

(Congressional members named FYI only. They do not attend)

- Monday, May 22, Birmingham, AL: Alabama Society of Enrolled Agents 2016 Spring Seminar (FTF)
  - Congressman Terri Sewell.
  - Topics: Automated Underreporter Program (AUR), Correspondence Exams, Payment Options and Other Online Tools, Private Debt Collection, Tax Scheme Awareness, Practitioner Data Breaches
- Wednesday, May 24, Waltham, MA: The 23rd Annual IRS Town Meeting at Bentley University (FTF)
  - Congresswoman Katherine Clark.
  - Topics: Correspondence Exams, Private Debt Collection, Collection User Fees, Early Interaction Initiative - FTD Alerts, Future State, Identity Theft and Phishing, Independent Contractor or Employee, Practitioner Data Breaches, Sharing Economy

## **Communications and Liaison – Weekly Activity Report Week of May 30, 2017**

### **Internal Communications**

#### Headlines

- New features available when you view your tax account (W&I)
- HR Connect gets an upgrade this summer (HCO)
- If you're retiring soon, use the new retirement application tool (HCO)
- Treasury is requesting your feedback (Treasury)

#### Leaders' Alert

- Outlook upgrade will automate much of the email records management process (PGLD)

#### Other News

- Being a CSR is a calling (W&I)

#### Poll Question

- Whom do you call if you can't reset your HR Connect password? (HCO)
- Which program allows for a secure online exchange of information with the IRS and taxpayers without the use of special software? (C&L)

#### Spotlight

- Summer staycation (C&L)

#### Webbie

- Treasury Leadership Legacy Honors go to 15 IRS executive and senior managers (HCO)
- SharePoint will have limited access Memorial Day weekend (IT)
- Be the Terminator – say hasta la vista to workplace hazards (AWSS)
- Be prepared for emergencies that may require you to shelter in place (AWSS)

### **Media Relations**

#### Potential news releases for this week:

- Now available spring 2017 statistics of income bulletin
- New features available in online accounts
- Tax professionals can earn CPE credits at the 2017 IRS nationwide tax forums

#### Potential releases for coming weeks:

- N/A

### **National Public Liaison**

Tue. May 23 – Small Business Forum @ NFIB – Mark Gillen and Jeff Wallbaum are attending the forum to discuss Future State with key small business industry partners. New partners from the Small Business Administration will attend the meeting.

### **Legislative Affairs**

Not an IRS Agency Record

## UPCOMING HEARINGS:

Currently, there are no hearings scheduled.

## **Social Media**

### FRONT PAGE

Featured Video: Replace “Military Tax Tips” with Part-Time and Summer Jobs

Rotating Spotlight:

- Replace “After Deadline” with Military Appreciation: NR; Mil Center; Veterans (if NR is issued)

News section

- New features available in online accounts (if NR is issued)

VIDEO TIP (List Serv): “Summer Jobs”

### TWITTER

Topics include:

- Understanding your notice *\*New*
- IRS Publications (*potential*)
- Tips for taxpayers who owe
- Tax Forums
- Student Loan tax info – FAFSA (*pinned tweet*)
- Business Tips: Tax Centers
- Get Transcript feature – online accounts (*potential: depending on NR*)
- Military appreciation month
- After Deadline Messages: WMR, IRS letter, 1040X, OIC, etc.

FB/TUMBLR/YT

Featured video: “Summer Jobs”

## **Visual Education and Communications**

### Internal Programs

#### 1. Video to Desk-top – Live or Recorded Events:

Live Stream - Chief Counsel: Ethics (05/24)

Ethics – May 24

Ethics Rebroadcast – June 1 – 12:30pm -3:00pm EST (PER UNION)

Ethics Rebroadcast – June 5 – 11:00am -1:30pm EST (PER UNION)

Topic: Chief Counsel 2017 Tax Practice and Ethics Series - Ethics.

Program will cover Ethics on May 24 with Kenneth W. Gaul, David Taube, Hilary March Hap Trice, Emily Lesniak, Michael Franklin and Vikramsing Barad.  
Audience: All Chief Counsel Attorneys and paralegals, maximum of 600 viewers.

Chief Counsel: Tax Practice 3 – Rebroadcast Live Stream (05/25)

Tax Practice 3 – May 18

Tax Practice 3 Rebroadcast – May 25

Ethics – May 24

Ethics Rebroadcast – June 1 – 12:30pm -3:00pm EST (PER UNION)

Ethics Rebroadcast – June 5 – 11:00am -1:30pm EST (PER UNION)

Topic: Chief Counsel 2017 Tax Practice and Ethics Series - Tax Practice 3.

Program will cover Passport Program with Laurence K. Williams, Chris Jones

Thomas M. Rath, Lisa Lafferty and Private Debt Collection with Francis M.

McCormick, Jason Bremer, Aaron D. Gregory and Whistleblower with Kevin Gillin

Robert T. Wearing.

Audience: All Chief Counsel Attorneys and paralegals, maximum of 600 viewers.

## 2. SABA Sessions (Captioning):

LBi - No Transcript - Direct, Indirect and Constructive Ownership Rules for International Information Returns (05/22)

Audience: LB&I Employees

Informational/Training

SBSE - Virtual Leadership and Collaboration (05/23)

Audience: All levels of managers in SBSE Operations Support. About 80 managers total. Most managers are highly experienced. Examples of grade and series: IR-340-1 and IR-343-4. There will be unscripted discussion and questions throughout the presentations.

Informational/Training

LBi - NO TRANSCRIPT - EEO Compliance for Managers (05/23)

Audience: LB&I Employees and Managers

Informational/Training

SBSE - Change the Constant (05/23)

Audience: All levels of managers in SBSE Operations Support. About 80 managers total. Most managers are highly experienced. Examples of grade and series: IR-340-1 and IR-343-4. There will be unscripted discussion and questions throughout the presentations.

Informational/Training

SBSE - The Role of a Customer Service Operation (05/24)

Audience: All levels of managers in SBSE Operations Support. About 80 managers total. Most managers are highly experienced. Examples of grade and series: IR-340-1 and IR-343-4. There will be unscripted discussion and questions throughout the presentations.

Informational/Training

TEGE - Audit Hour - May 2017 (05/24)

Audience: IRS Employees

Informational/Training

SBSE - How to Create Performance Plans and Set Performance Expectations (05/24)

Audience: All levels of managers in SBSE Operations Support. About 80 managers total. Most managers are highly experienced. Examples of grade and series: IR-340-1 and IR-343-4. There will be unscripted discussion and questions throughout the presentations.

Informational/Training

TEGE - FSLG - Back to Basics Pt 3 - Preparing Lead Sheets & Workpapers (05/25)

Audience: IRS Employees

Informational/Training

3. Other Projects: *(i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)*

Avid Edit: ASL Mandatory Briefing Project (05/22-05/25)

Criminal Investigation (CI) Senior Leadership Media Training Taping @1111 (05/23-05/24)

Topic: This is a quarterly visit by 1/3 of CI's most senior leaders from around the country. We would like to take advantage of the opportunity to conduct media training in the scenario. For this visit, we will only be conducting one scenario, a stand-up TV interview. CI personnel will act as the media members and ask questions.

Audience: CI SACs and ASACs--most senior leaders in the field.

Avid Edit: Criminal Investigation (CI) YouTube Videos (05/23-05/26)

External Programs

1. Servicewide Video Editorial Board (SVEB) – External:

- YouTube Request VR#140 – Can't pay all the tax you owe? Consider a Payment Plan  
Target Audience: External taxpayers  
Informational message
- Request VR#565 – National Tax Forums Video  
Target Audience: External, audience of tax practitioners across five trade shows. The Audience size of up to 1500 at each of 5 locations.  
Informational message
- Request VR#566 – TEGE Captivate Video - Individual Indian Tax Issues – Tip Compliance  
Target Audience: External, members of Indian Tribal Governments, Per POC: "ITG has a video series entitled "Individual Indian Tax Issues..." posted under the "Tribes" index on the IVP. Therefore, although intended for tribal members, it is available for anyone to view: <https://www.tax.gov/Governments/Tribes>  
Informational message
- Request VR#567 – TEGE Captivate Video - Individual Indian Tax Issues – Self-Employed  
Target Audience: External, members of Indian Tribal Governments, Per POC: "ITG has a video series entitled "Individual Indian Tax Issues..." posted under the "Tribes" index on the IVP. Therefore, although intended for tribal members, it is available for anyone to view - <https://www.tax.gov/Governments/Tribes>  
Informational message

## **Stakeholder Liaison Field**

### **Small Business Forums (SBF's)**

(Congressional members named FYI only. They do not attend)

- Tues., May 23, Columbia, SC (F2F)
  - Congressmen Joe Wilson and James Clyburn
  - Topics: Collection User Fees; Future State; Identity Theft and Phishing; Online Payment Agreements
- Tues., May 23, Orlando, FL (F2F)
  - Congresswoman Stephanie Murphy and Congressman Ron Desantis
  - Topics: Future State; Identity Theft and Phishing
- Thurs., May 25, Indianapolis, IN (Virtual). Event for MI & OH stakeholders
  - All Congress persons for the States of Michigan and Ohio
  - Topics: Private Debt Collection; Identity Theft and Phishing; New Entrepreneurs Initiative; Sharing Economy

### **Practitioner Liaison Meeting (PLM's)**

(Congressional members named FYI only. They do not attend)

- Tues., May 23, El Monte, CA (F2F)
  - Congressman David Valadao and Congresswoman Grace Napolitano
  - Topics: Future State; Identity Theft and Phishing; New Secure Access Process for Get Transcript
- Wed., May 24, Troy, MI (F2F and Virtual)
  - Congressmen Dave Trott, John Conyers, Jr and Congresswomen Debbie Dingell and Brenda Lawrence
  - Topics: Private Debt Collection, Changes in OIC Policy, Practitioner Data Breaches, Tax Schemes Awareness, Overview of Field Audit Process
- Thurs., May 25, Philadelphia, PA (F2F and Virtual)
  - Congressmen Lloyd Smucker, Robert Brady, Dwight Evans, Ryan Costello, and Mike Kelly
  - Topics: Payment Options; Practitioner Data Breaches; Tax Security Awareness
- Thurs., June 1, Tampa, FL (F2F)
  - Congresswoman Kathy Castor, Congressman Dennis Ross and Charlie Christ
  - Topics: Changes to OIC Policy; Practitioners Filing Accurate EITC/Refundable Credits Returns; Private Debt Collection; Tax Scheme Awareness
- Thurs., June 1, San Bernardino, CA (F2F)
  - Congressman Pete Aguilar and Congresswoman Grace Napolitano
  - Topics: Practitioner Data Theft; Private Debt Collection; Taxpayer Digital Communication; OIC Policy Change

### **Practitioner Symposium/Working Together**

(Congressional members named FYI only. They do not attend)

- Wed., May 24, Malvern, PA (F2F)
  - Congressmen Lloyd Smucker, Robert Brady, Dwight Evans, Ryan Costello, and Mike Kelly
  - Topics: Automated Underreporter Program (AUR); Changes to OIC Policy; Correspondence Exams; Field Audit Process; Payment Options and Other Online Tools; Practitioners Filing Accurate EITC and Refundable Credits Returns; Private Debt Collection; Tax Scheme Awareness; Appeals Judicial Approach and Culture (AJAC); Identity Theft and Phishing; New Secure Access Process for Get Transcript; Online Payment Agreements; Practitioner Data Breaches; Practitioner Priority Service
- Thurs., June 1, Glassboro, NJ (F2F)
  - Congressman Donald NoCross
  - Topics: Automated Underreporter Program (AUR); Changes to OIC Policy; Correspondence Exams; Field Audit Process; Payment Options and Other Online Tools; Practitioners Filing Accurate EITC and Refundable Credits Returns; Private Debt Collection; Tax Scheme Awareness; Appeals Judicial Approach and Culture (AJAC); Identity Theft and Phishing; New Secure Access Process for Get Transcript; Online Payment Agreements; Practitioner Data Breaches; Practitioner Priority Service

#### **Other Stakeholder Liaison Field Events**

(Congressional members named FYI only. They do not attend)

- Monday, May 22, Birmingham, AL: Alabama Society of Enrolled Agents 2016 Spring Seminar (FTF)
  - Congressman Terri Sewell.
  - Topics: Automated Underreporter Program (AUR), Correspondence Exams, Payment Options and Other Online Tools, Private Debt Collection, Tax Scheme Awareness, Practitioner Data Breaches
- Wednesday, May 24, Waltham, MA: The 23rd Annual IRS Town Meeting at Bentley University (FTF)
  - Congresswoman Katherine Clark.
  - Topics: Correspondence Exams, Private Debt Collection, Collection User Fees, Early Interaction Initiative - FTD Alerts, Future State, Identity Theft and Phishing, Independent Contractor or Employee, Practitioner Data Breaches, Sharing Economy



# **Communications and Liaison – Weekly Activity Report**

## **Week of June 5, 2017**

### **Internal Communications**

#### Employee email

- Help feed the hungry through the Feds Feed Families food drive (DCOS)

#### IRS Headlines

- Use new IDRS tool to help with Affordable Care Act-related cases (ACA)
- Stay up-to-date with the Office of Servicewide Penalties through quarterly discussion sessions (SBSE)
- Report incidents to the Situational Awareness Management Center to protect yourself, co-workers (AWSS)
- Reminder: Take the Federal Employee Viewpoint Survey by June 13 (HCO)

#### Leaders' Alert

- SETR's field helps employees manage their biweekly salary cap limit (HCO)
- Interactive graphs help you visualize your workforce (HCO)
- Help your employees get ready for the Office 365 ProPlus and email upgrade with these resources (IT)
- Prepare to use the new Servicewide Knowledge Management site (HCO)

#### Poll questions

- How often should you access and review your online Statement of Earnings and Leave? (HCO)
- What secure tool lets taxpayers see how much they owe in taxes, penalties and interest, and apply online payment options in one place? (C&L)

#### Spotlight

- The art of listening (Effective Communications Month) (TAS)
- Bragging rights (Multiple)
- World Blood Donor Day (SBSE)

#### Webbie

- Starting 6/14, provide a reason in ConcurGov if you don't have lodging (CFO)
- Offices awaiting distribution of official presidential portraits (AWSS)

### **Media Relations**

#### Potential news releases for this week:

- Scams reminder – new scam involving EFTPS
- New features available in online accounts

#### Potential releases for coming weeks:

- Interest rates remain the same for the third quarter of 2017
- IRS appeals program pilots virtual service

### **National Public Liaison**

Thu. June 15 – Monthly Practitioner Meeting.

Tue. June 20 – Wed. June 21 – Information Reporting Program Advisory Committee (IRPAC) working session.

Tue. June 27 – Electronic Tax Administration Advisory Committee (ETAAC) working session.

Wed. June 28 – ETAAC Public Meeting.

### **Legislative Affairs**

NOT IRS AGENCY RECORDS



#### **UPCOMING HEARINGS:**

Currently, there are no hearings scheduled.

### **Social Media**

### **Visual Education and Communications**

#### **Internal Programs**

##### **1. Video to Desk-top – Live or Recorded Events:**

Chief Counsel: Ethics – Rebroadcast Stream (06/05)

Ethics – May 24

Ethics Rebroadcast – June 1 – 12:30pm -3:00pm EST (PER UNION)

Ethics Rebroadcast – June 5 – 11:00am -1:30pm EST (PER UNION)

Topic: Chief Counsel 2017 Tax Practice and Ethics Series - Ethics.

Program will cover Ethics on May 24 with Kenneth W. Gaul, David Taube, Hilary March Hap Trice, Emily Lesniak, Michael Franklin and Vikramsing Barad.

Audience: All Chief Counsel Attorneys and paralegals, maximum of 600 viewers.

FMSS: Random Access Screening Program Town Hall @1111 –

Polycom/SABA/Stream (06/07)

Topic: FMSS will host a Random Access Screening Program via Town Hall.

Audience: The audience is the entire population of Main IR including contractors.

##### **2. SABA Sessions (Captioning):**

HCO - IT Connection: Click It, Learn It! (06/08)

Audience: The audience is Information Technology employees (all grade levels) and managers who are located nationwide.

Informational/Training

HCO - Veterans Town Hall (06/08)

Audience: Audience consists of veterans employed by IRS across the country.

Informational/Training

3. Other Projects: *(i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)*

Avid Edit: ASL Mandatory Briefing Project (06/05-06/09)

Avid Edit: YouTube Short Version (06/05, 06/07)

Avid Edit: Criminal Investigation (CI) YouTube Videos (06/06-06/09)

SBSE: OPR Webinar Taping (06/08)

Topic: Webinar will provide the last OPR updates for 2017

Audience: External Tax Practitioners and Small Business Owners

4. Servicewide Video Editorial Board (SVEB) – Internal:

Request #573 – IT Enterprise Field Operations (EFO) Town Hall via Webcast

Target Audience: Internal. EFO employees and contractors, approx. 550+

Informational Employee Message

External Programs

1. Servicewide Video Editorial Board (SVEB) – External:

Request #574 – TEGE Captivate video - Applying for Exemption with a Focus on Form 1023-EZ

Target Audience: External. Taxpayers nationwide

Informational/Educational message

**Stakeholder Liaison Field**

**Small Business Forums (SBF's)**

(Congressional members named FYI only. They do not attend)

- Tues., June 13, Kansas City, MO (F2F) **CEC**
  - Congressmen Emmanuel Cleaver II, Sam Graves, Billy Long, and Congresswoman Vicky Hartzler
  - Topics: Direct Pay; Employment Tax Issues; Identity Theft and Phishing; Independent Contractor or Employee; New Entrepreneurs Initiative; Sharing Economy; Small Business Recordkeeping
- Tues., June 13, Rocky Mountain SBF (Virtual) (ID, MT, WY, CO, and UT) **KH**
  - All Idaho Congressmen and MT, WY, CO, and UT
  - Topics: Private Debt Collection; Identity Theft and Phishing
- Thurs., June 15, Downers Grove, IL (Virtual) **CEC**
  - All Illinois Congressmen
  - Topics: Automated Underreporter Program (AUR); Changes to OIC Policy; Correspondence Exams; Field Audit Process; Payment Options and Other Online Tools; Private Debt Collection; Tax Scheme Awareness; Dirty Dozen; Online Payment Agreements; Payment Options

**Practitioner Liaison Meeting (PLM's)**

(Congressional members named FYI only. They do not attend)

- Wed., June 7, NH & MA (Virtual) **MCP**
  - All Congressmen for both NH & MA
  - Topics: Changes to OIC Policy; Private Debt Collection; Tax Scheme Awareness; Taxpayer Digital Communications (TDC); E-Services Authentication Process; Future State; Identity Theft and Phishing; New Secure Access Process for Get Transcript; Practitioner Data Breaches; Practitioner Priority Service; Rules of Representation (RPO); Social Media; Tax Security Awareness
- Wed., June 7, Augusta, ME (Virtual) **MAR**
  - Congressmen for the state of Maine
  - Topics: ACA Other; Future State; Identity Theft and Phishing; Practitioner Data Breaches
- Wed., June 7, Sacramento, CA (F2F)
  - Congressmen Ami Bera and Tom McClintock. Congresswoman Doris Matsui
  - Topics: Early Interaction Initiative - FTD Alerts; Foreign Bank and Financial Accounts (FBAR); Online Payment Agreements
- Thurs, June 8, St. Paul, MN (F2F) **KW**
  - Congresswoman Betty McCollum. Congressman Keith Ellison, Erik Paulsen, Jason Lewis
  - Topics: Collection User Fees; Identity Theft and Phishing; Practitioner Data Breaches; Private Debt Collection
- Tues, June 13, State of Alaska (Virtual from Seattle, WA) **KH**
  - All Alaskan Congressmen
  - Topics: Automated Underreporter Program (AUR); Changes to OIC Policy; Correspondence Exams; Payment Options and Other Online Tools; Private Debt Collection; Tax Scheme Awareness
- Tues., June 13, Atlanta, GA (F2F) **GT**
  - Congressman John Lewis, Hank Johnson, Drew Ferguson, and Rob Wooddall
  - Topics: Retirement Plans Made Easy and Correspondence Exam.
- Wed., June 14, Portland, OR(F2F) **KH**
  - Congresswoman Suzanne Bonaci and Congressmen Greg Walden, Earl Blumenauer, Kurt Scherder
  - Topics: Automated Underreporter Program (AUR); Changes to OIC Policy; Correspondence Exams; Payment Options and Other Online Tools; Private Debt Collection; Tax Scheme Awareness
- Thurs., June 15, Indianapolis, IN (F2F & Virtual) **KW**
  - Congressmen Andre' Carson, Todd Rokita, Luke Messer, and Congresswoman Susan Brooks
  - Topics: Private Debt Collection; Automated Underreporter Program (AUR); Identity Theft and Phishing; ITIN Outreach - Path Act; Practitioner Data Breaches
- Thurs., June 15, New Haven, CT (F2F) **MAR**
  - Congresswomen Rosa DeLauro, Elizabeth Esty and Congressmen James Himes, John Larson
  - Topics: Identity Theft and Phishing; Practitioner Data Breaches
- Thurs., June 15, Salt Lake City, UT (F2F) **KH**

- Congressmen Robert Bishop, Chris Stewart, Jason Chaffetz and Congresswoman Mia Love
- Topics: ACA Provision 4980H - Employer Shared Responsibility Provisions; Changes to OIC Policy; Private Debt Collection
- Thurs., June 15, Waukesha, WI (F2F) **CEC**
  - Congressman James Sensenbrenner Jr., Paul Ryan, and Congresswoman Gwen Moore
  - Topics: CAF - Third Party Authorizations; Collection User Fees; Identity Theft and Phishing; Online Payment Agreements; Practitioner Data Breaches
- Thurs., June 15, Dallas, TX (F2F & Virtual) **GT**
  - Congresswoman Eddie Bernice Johnson and Congressmen Pete Sessions and Jeb Hensarling
  - Topics: Collection User Fees; Dirty Dozen; Online Payment Agreements; Refundable Credits PATH Due Diligence and Tax Law changes TBD; CAF - Third Party Authorizations; Identity Theft and Phishing; Payment Options; Practitioner Data Breaches; Practitioner Priority Service; Private Debt Collection; Tax Security Awareness; Taxpayer Digital Communications (TDC)

### **Coordinated Web Conference**

- Thurs., June 15, Nationwide (Virtual)
  - All U.S. Congressmen
  - Topics: Role of Form 8300 in Combating Money Laundering, Form 8300 Filing Requirements, Recordkeeping Requirements, and IRS Resources.

# **Communications and Liaison – Weekly Activity Report**

## **Week of June 12, 2017**

### **Internal Communications**

#### Employee email

- Future State developments for taxpayers and employees (Multiple)

#### Headlines

- New FAQs help determine if use of Social Security numbers is necessary (PGLD)
- Get ready for the Office 365 ProPlus and email upgrade with these resources (IT)
- Use the new Servicewide Knowledge Management site (HCO)
- Your Federal Employee Group Life Insurance premium may increase as you age (HCO)
- Be prepared: Summer may bring bad weather (AWSS)
- IRS.gov home page getting a new, user-friendly look (Online Services)
- Posting overtime, nonpay hours in the same pay period may affect your paycheck (HCO)

#### Poll Questions

- Which of these colors is not on the lesbian, gay, bisexual and transgender (LGBT) Pride flag? (EDI)
- What does the acronym ELMS stand for? (C&L)

#### Spotlight

- Proud, 2017 (Lesbian, Gay, Bisexual and Transgender, Pride Month) (Appeals)

#### Webbies

- Random screening of IRS Headquarters occupants, visitors begins on 6/14 (AWSS)
- IT Security Tip: Follow mobile device access rules when traveling internationally (IT)
- All IRS logistics programs consolidated within Facilities Management and Security Services (AWSS)

### **Media Relations**

#### Potential news releases for this week:

- Scams reminder – new scam involving EFTPS
- New features available in online accounts
- Reminder to file – failure to file penalties
- Reminder about June 15 deadline for overseas tax filers

#### Potential releases for coming weeks:

- IRS appeals program pilots virtual service
- Understanding employment taxes

### **National Public Liaison**

- Tue. June 13, 2 pm ET – Tax Talk Today: Small Business Tax Primer
- Wed. June 14, 1 pm ET – Outreach & Education Leadership call
- Thu. June 15 – Monthly Practitioner Meeting

- Wed. June 28, 9 am ET – Electronic Tax Administration Advisory Committee  
Public Meeting

### **Legislative Affairs**

Not an IRS Agency Record



On June 26, [6 p.m. to 8 p.m.], Anabel Marquez, Media Relations on behalf of Legislative Affairs & Doris Ward, TAS will participate in a Federal Assistance Information Session for constituents, sponsored by Rep. Ed Royce (CA 39) in Buena Park, CA.  
Subject: ID Theft Overview

On July 7, 2017 [9 a.m. to 12 p.m.], Anabel Marquez, Media Relations on behalf of Legislative Affairs and Linda Lowrey of CI will participate in a Senior Fair, sponsored by Rep. Pete Aguilar (CA-31), in Colton, CA. Subject: identity theft and the IRS phone scam

## **HEARINGS:**

On Wednesday, July 26, 2017, a hearing is tentatively scheduled to be held before the Subcommittee on Financial Services and General Government, Senate Appropriations Committee on the Fiscal Year 2018 budget. The hearing time and location are TBD.  
Witness: Commissioner, John Koskinen is scheduled to testify

## **Social Media**

## **Visual Education and Communications**

### **Internal Programs**

#### **1. SABA Sessions (Captioning):**

LB&I - No transcript - Straddle Challenges and Applications in Tax Examinations (06/13)

Audience: LB&I Employees  
Informational/Training

TEGE - SR TEQMS Lunch and Learn Improvement Opportunities (06/13)

Audience: IRS Employees  
Informational/Training

LB&I - No Transcript - Inversion Regulations Part 1 (06/14)

Audience: LB&I Employees  
Informational/Training

LB&I - No Transcript - Inversion Regulations Part 2 (06/14)

Audience: LB&I Employees  
Informational/Training

EDI - David Fram: Collecting Medical Information under the ADA & FMLA (06/15)

Audience: IRS managers and employees from the Disability Office located in various PODs around the country.  
Informational/Training

LB&I - No Transcript - Inversion Regulations Part 3 (06/15)

Audience: LB&I Employees  
Informational/Training

#### **2. Other Projects: (*i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.*)**



Avid Edit: ASL Mandatory Briefing Project (06/12-06/16)

Avid Edit: Criminal Investigation (CI) YouTube Videos (06/13-06/16)

YouTube: English/Spanish on ITIN Taping @1111 (06/13)

Topic: ITIN video now and audio of digits for future edits.

Audience: Taxpayers who use ITINs

### External Programs

#### 1. Servicewide Video Editorial Board (SVEB) – External:

YouTube Request #144 – New Rules for ITINs

Target Audience: External. Taxpayers

Informational message

Request #575 – CI Special Agent Entry Level Hiring Writing Sample Video

Target Audience: External. Applicants applying to become Special Agents within the IRS

Informational message

### Stakeholder Liaison Field

Small Business Forums (SBF's)

(Congressional members named FYI only. They do not attend)

- Tues., June 13, Kansas City, MO (F2F) CEC
  - Congressmen Emmanuel Cleaver II, Sam Graves, Billy Long, and Congresswoman Vicky Hartzler
  - Topics: Direct Pay; Employment Tax Issues; Identity Theft and Phishing; Independent Contractor or Employee; New Entrepreneurs Initiative; Sharing Economy; Small Business Recordkeeping; Tax Scheme Awareness
- Tues., June 13, Las Vegas, NV (F2F) AMS for DG
  - Congresswoman Dina Titus
  - Topics: Payment Options and Other Online Tools; Private Debt Collection; New Secure Access Process for Get Transcript
- Tues., June 13, Rocky Mountain SBF (ID, MT, WY, UT and CO) KH (Virtual)
  - All Idaho Congressmen plus those from MT, WY, UT and CO
  - Topics: Private Debt Collection; Identity Theft and Phishing
- Thurs., June 15, Downers Grove, IL (Virtual) CEC
  - All Illinois Congressmen
  - Topics: Automated Underreporter Program (AUR); Changes to OIC Policy; Correspondence Exams; Field Audit Process; Payment Options and Other Online Tools; Private Debt Collection; Tax Scheme Awareness; Dirty Dozen; Online Payment Agreements; Payment Options
- Tues., June 20, Milwaukee, WI (F2F) CEC
  - Congressman James Sensenbrenner Jr., Paul Ryan, and Congresswoman Gwen Moore

- Topics: Automated Underreporter Program (AUR); Changes to OIC Policy; Correspondence Exams; Payment Options and Other Online Tools; Private Debt Collection; Tax Scheme Awareness; Dirty Dozen; Online Payment Agreements; Payment Options
- Wed., June 21, Jackson, MS (F2F) CEC
  - Congressmen Roger Wicker
  - Topics: Future State; Identity Theft and Phishing; Tax Scheme Awareness; Payment Options and Other Online Tools; Private Debt Collection
- Wed., June 21, Jacksonville, FL (F2F) GT
  - Congressmen John Rutherford, Al Lawson
  - Topics: Payment Options and Tax Schemes
- Wed., June 21, Phoenix, AZ (F2F)
  - Congressmen Rueben Gallego, David Schweikert, Andy Biggs, Trenton Franks, and Paul Gosar, and Congresswoman Krysten Sinema
  - Topics: Private Debt Collection; Tax Scheme Awareness; Sharing Economy

#### Practitioner Liaison Meeting (PLM's)

(Congressional members named FYI only. They do not attend)

- Tues, June 13, State of Alaska (Virtual from Seattle, WA) KH
  - All Alaskan Congressmen
  - Topics: Automated Underreporter Program (AUR); Changes to OIC Policy; Correspondence Exams; Payment Options and Other Online Tools; Private Debt Collection; Tax Scheme Awareness
- Tues., June 13, Atlanta, GA (F2F) GT
  - Congressman John Lewis, Hank Johnson, Drew Ferguson, and Rob Wooddall
  - Topics: Retirement Plans Made Easy and Correspondence Exam.
- Wed., June 14, Portland, OR(F2F) KH
  - Congresswoman Suzanne Bonaci and Congressmen Greg Walden, Earl Blumenauer, Kurt Scherder
  - Topics: Automated Underreporter Program (AUR); Changes to OIC Policy; Correspondence Exams; Payment Options and Other Online Tools; Private Debt Collection; Tax Scheme Awareness
  -
- Thurs., June 15, Indianapolis, IN (F2F & Virtual) KW
  - Congressmen Andre' Carson, Todd Rokita, Luke Messer, and Congresswoman Susan Brooks
  - Topics: Private Debt Collection; Identity Theft and Phishing; ITIN Outreach - Path Act; Practitioner Data Breaches; Reporting abusive tax promotions and/or promoters - Lead Development Center
- Thurs., June 15, New Haven, CT (F2F) MR
  - Congresswomen Rosa DeLauro, Elizabeth Esty and Congressmen James Himes, John Larson
  - Topics: Identity Theft and Phishing; Practitioner Data Breaches

- Thurs., June 15, Salt Lake City, UT (F2F) KH
  - Congressmen Robert Bishop, Chris Stewart, Jason Chaffetz and Congresswoman Mia Love
  - Topics: ACA Provision 4980H - Employer Shared Responsibility Provisions; Changes to OIC Policy; Private Debt Collection
- Thurs., June 15, Waukesha, WI (F2F) CEC
  - Congressman James Sensenbrenner Jr., Paul Ryan, and Congresswoman Gwen Moore
  - Topics: CAF - Third Party Authorizations; Collection User Fees; Identity Theft and Phishing; Online Payment Agreements; Practitioner Data Breaches
- Thurs., June 15, Dallas, TX (F2F & Virtual) GT
  - Congresswoman Eddie Bernice Johnson and Congressmen Pete Sessions and Jeb Hensarling
  - Topics: Collection User Fees; Dirty Dozen; Online Payment Agreements; Refundable Credits PATH Due Diligence and Tax Law changes TBD; CAF - Third Party Authorizations; Identity Theft and Phishing; Payment Options; Practitioner Data Breaches; Practitioner Priority Service; Private Debt Collection; Tax Security Awareness; Taxpayer Digital Communications (TDC)
- Mon., June 19, Maitland, FL (Virtual) GT
  - All Florida Congressmen
  - Topics: Future State; Identity Theft and Phishing
- Wed., June 21, Boise, ID (F2F) KH
  - Congressman Michael Simpson
  - Topics: Identity Theft and Phishing; Practitioner Priority Service
- Wed., June 21, Warwick, RI (Virtual) MR
  - All Rhode Island Congressman
  - Topics: Tax Professional Data Theft and Protection, Identity Theft and Phishing, Payment Options & Other Online Tools, ACA Other, IMRS
- Thurs., June 22, Brooklyn, NY (Virtual) MCP
  - All NY Congressmen
  - Topics: Data Breaches; Identify Theft; Overview of CAS/RICS; TDC, PTIN
  - Local Tax Professional also to speak on his experiences with Data Breaches

#### Working Together - KW

- Wed., June 21, Livonia, MI (F2F)
  - Congressmen Dave Trott, John Conyers, Jr and Congresswomen Debbie Dingell and Brenda Lawrence
  - Topics: Data Breech, E-Payments, PTIN, EFIN, Taxpayer Digital Pilot, Private Debt Collection, Schedule D, S-Corp, SBSE Updates, Data Breech

#### National Webinars

- Thurs., June 15, Nationwide (Virtual) AMS for DG

- All U.S. CongressmenTopics: Role of Form 8300 in Combating Money Laundering, Form 8300 Filing Requirements, Recordkeeping Requirements, and IRS Resources

# **Communications and Liaison – Weekly Activity Report**

## **Week of June 19, 2017**

### **Internal Communications**

#### Headlines

- Your Federal Employee Group Life Insurance premium may increase as you age (HCO)
- Check Disclosure Virtual Library for answers to your disclosure-related questions (PGLD)
- Posting both overtime, nonpay hours in the same pay period may affect your paycheck (HCO)
- Let's clear the air – be part of the solution not the pollution (AWSS)
- All videos, webinars, IVTs require advance approval (C&L)
- Records Radar: Sign up for demonstration to see new Outlook in action (PGLD)

#### Highlights from Services and Enforcement

- Cross-functional team fights one of the IRS's "Dirty Dozen" tax schemes (DCSE)

#### Leaders' Alert

- Remember to make taxpayer burden reduction part of project planning (SBSE)
- Register for Treasury Executive Institute's summer leadership training (HCO)
- You must sign a printed copy of any ePerformance document your proxy created, reviewed or approved (HCO)

#### Poll Question

- What online IRS Tax Calendar tasks can you do from a mobile device? (SBSE)

#### Spotlight

- Proud, 2017 (Lesbian, Gay, Bisexual and Transgender, Pride Month) (Appeals)

#### Webbies

- This, not that: Learn what items are prohibited within federal facilities (AWSS)
- IRS voluntary recycling program with U.S. Postal Service is available to employees (AWSS)

### **Media Relations**

#### Potential news releases for this week:

- ITIN renewal reminder
- Info for those who failed to file and owe tax
- Small business Thursday/understanding employment taxes
- IRS appeals program pilots virtual service
- Scams reminder – common scams

#### Potential releases for coming weeks:

- ETAAC 2017 Annual Report

### **National Public Liaison**

Wed. June 28, 9 a.m. – The Electronic Tax Administration Advisory Committee (ETAAC) presents its annual report to Commissioner Koskinen and IRS executives. Melrose Suites Hotel, Washington, D.C.

Information Reporting Program Advisory Committee (IRPAC): June 20-21, 2017, representatives from Wage, LB&I, TEGE, SB/SE, and Counsel will attend the IRPAC working session in Washington, D.C. Dialogues will focus on information reporting issues of mutual concern to the private sector and the federal government. These discussions encouraged the advisory members to provide feedback on methods to improve tax compliance and information reporting.

### **Legislative Affairs**

Not an IRS Agency Record



On June 26, [6 p.m. to 8 p.m.], Anabel Marquez, Media Relations on behalf of Legislative Affairs & Doris Ward, TAS will participate in a Federal Assistance Information Session for constituents, sponsored by Rep. Ed Royce (CA 39) in Buena Park, CA.  
Subject: ID Theft Overview

Not an IRS Agency Record



On July 7, 2017 [9 a.m. to 12 p.m.], Anabel Marquez, Media Relations on behalf of Legislative Affairs and (b) (6) will participate in a Senior Fair, sponsored by Rep. Pete Aguilar (CA-31), in Colton, CA. Subject: identity theft and the IRS phone scam

#### UPCOMING HEARINGS:

On Wednesday, July 26, 2017, a hearing is tentatively scheduled to be held before the Subcommittee on Financial Services and General Government, Senate Appropriations Committee on the Fiscal Year 2018 budget. The hearing time and location are TBD. Witness: Commissioner, John Koskinen is scheduled to testify

On Thursday, June 29, 2017, the House Ways and Means Committee will hold a joint hearing of the Oversight Subcommittee and the Social Security Subcommittee on states and municipalities and the FICA tax (Time TBD). The Committee is inviting a witness from SSA (TBD), as well as a witness from the National Council for State Social Security Commissioner (TBD). The IRS witness will be Sunita Lough, Commissioner Tax Exempt/Government Entities. Location is yet to be determined.

### **Social Media**

### **Visual Education and Communications**

#### Internal Programs

##### 1. Video to Desk-top – Live or Recorded Events:

C&L Future State Seminar @1111 – Polycom/SABA (06/19)

Topic: A discussion with leadership Faith Bell, Acting Human Capital Officer accompanied by 2-3 panelists Ken Corbin, W&I Commissioner and Mary Beth Murphy, SB/SE Commissioner who will talk about the IRS Future State. Attendees will hear about the Future State in the context of their daily work and learn what actions they can take to give feedback and stay informed.

Audience: All IRS Employees

##### 2. SABA Sessions (Captioning):

HCO - Leadership Behavior Session (06/20)

Audience: The session is for employees that wish to become managers or advance in management. It includes managers, Leadership Succession Review participants at all grade levels.

Informational/Training

APPEALS - Insights from the Bench with Judge Paige Marvel (06/20)

Audience: All employees will be invited to this event.

Informational/Training

LBI - Conflict Of Interest Awareness (06/21)

Audience: LB&I Employees

Informational/Training

IT - AD PM Roundtable (06/21)

Audience: Audience includes Project Managers in Applications Development as well as managers.

Informational/Training

LB I - NO TRANSCRIPT - Remote Auditing Best Practices (06/22)

Audience: LB&I Employees

Informational/Training

TEGE - FY17 TEGE CPE, Employment Tax Update (06/22)

Audience: IRS Employees

Informational/Training

HCO - Division Leaders Chat: HR Customer Service (06/22)

Audience: This session is open to all HCO employees

Informational/Training

3. Other Projects: *(i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)*

Avid Edit: Criminal Investigation (CI) YouTube Videos (06/20-06/23)

Avid Edit: C&L Future State Seminar (06/20)

TAS: Most Litigated Issues - Session 1 Taping (06/20)

Topic: The National Taxpayer Advocate will discuss 4 Most Litigated Issues with an Attorney Advisor and an LTC Director. Topics and taping dates- Collection Due Process - (b) (6) Chris Duling, NTA and Penalties - Joe Kovacs, Andy Van Singel, NTA taping on June 20

Audience: All TAS Employees

PGLD UNAX Taping (06/20)

Avid Edit - YouTube: English ITIN (06/21-06/22)

Avid Edit - YouTube: Spanish ITIN (06/22-06/23)

4. Servicewide Video Editorial Board (SVEB) – Internal:

Request VR#576 – Future State Forums via Saba Sessions

Target Audience: Internal all IRS employees nationwide

Informational message

Request VR#577 – SBSE Estate & Gift Tax CPE 2017 via Webcast

Target Audience: Internal, IRS employees nationwide - Estate Tax Attorneys (ETA), Paralegals and other stakeholders, approximately 300 nationwide  
Employee Training

Request VR#578 – Risk Management Case Study

Target Audience: Internal. IRS executives, managers and employees, including CDP classes, who may participate in this case study exercise to be facilitated by the Chief Risk Officer. Initially, less than 100 – but could grow if case study is presented to additional groups.

Informational/educational message



## External Programs

### 1. Videos Uploaded to IRS YouTube Channels:

- English Videos:
  - ITIN (Pending Approval)
  - Why Tax Professionals Need a Security Plan (Pending Approval)
- Spanish Videos:
  - ITIN (Pending Approval)

## Stakeholder Liaison Field

### Small Business Forums (SBF's)

(Congressional members named FYI only. They do not attend)

- Tues., June 20, Milwaukee, WI (F2F) CEC
  - Congressman James Sensenbrenner Jr., Paul Ryan, and Congresswoman Gwen Moore
  - Topics: Automated Underreporter Program (AUR); Changes to OIC Policy; Correspondence Exams; Payment Options and Other Online Tools; Private Debt Collection; Tax Scheme Awareness; Dirty Dozen; Online Payment Agreements; Payment Options
- Wed., June 20, Jackson, MS (F2F) CEC
  - Congressmen Roger Wicker
  - Topics: Future State; Identity Theft and Phishing; Payment Options and Other Online Tools; Private Debt Collection; Tax Scheme Awareness;
- Wed., June 21, Jacksonville, FL (F2F) GT
  - Congressmen John Rutherford, Al Lawson
  - Topics: Payment Options and Tax Schemes
- Wed., June 21, Phoenix, AZ (F2F) GT
  - Congressmen Rueben Gallego David Schweikert, Andy Biggs, Trenton Franks, and Paul Gosar, and Congresswoman Krysten Sinema
  - Topics: Private Debt Collection; Tax Scheme Awareness; Sharing Economy
- Tues., June 27, Orlando, FL(F2F) GT
  - Congresswoman Stephanie Murphy and Congressman Ron Desantis
  - Topics: Future State; Identity Theft and Phishing

### Practitioner Liaison Meeting (PLM's)

(Congressional members named FYI only. They do not attend)

- Mon., June 19, Maitland, FL (Virtual) GT
  - All Florida Congressmen
  - Topics: Future State; Identity Theft and Phishing
- Wed., June 21, Boise, ID (F2FI)
  - Congressman Michael Simpson
  - Topics: Identity Theft and Phishing; Practitioner Priority Service

- Wed., June 21, Warwick, RI (Virtual) MAR
  - All Rhode Island Congressman
  - Topics: Tax Professional Data Theft and Protection, Identity Theft and Phishing, Payment Options & Other Online Tools, ACA Other, IMRS, PTIN
- Thurs., June 22, Brooklyn, NY (Virtual) MCP
  - All NY Congressmen
  - Topics: Tax Practitioner Data Theft, Tax Practitioner experience with Data Theft, Security Summit & Identify Theft Updates, Correspondence Exams & Taxpayer Digital Communications, Appeals overview
- Wed., June 28, Reno, NV (F2F)
  - Congresswomen Dina Titus and Jackey Rosen. Congressmen Mark AModei and Ruben Kihuen.
  - Payment Options and Other Online Tools; Private Debt Collection; Future State; Identity Theft and Phishing; ITIN Outreach - Path Act; Practitioner Data Breaches
- Thurs., June 29, Baltimore, MD (Virtual) DY
  - Congressmen Elijah Cummings and Jamie Raskin
  - Topics: Private Debt Collection; Dirty Dozen; Identity Theft and Phishing; Practitioner Data Breaches; Reporting abusive tax promotions and/or promoters - Lead Development Center; Sharing Economy

#### Working Together

- Wed., June 21, Livonia, MI (F2F) KW
  - Congressmen Dave Trott, John Conyers, Jr and Congresswomen Debbie Dingell and Brenda Lawrence
  - Topics: Data Breach, E-Payments, PTIN, EFIN, Taxpayer Digital Pilot, Private Debt Collection, Schedule D, S-Corp, SBSE Updates, Data Breach

# **Communications and Liaison – Weekly Activity Report**

## **Week of June 26, 2017**

### **Internal Communications**

#### Commissioner News

- Wielobob and Tribiano present the 2017 Deputy Commissioner's Awards (DCSE/DCOS)

#### Headlines

- Use taxpayer burden reduction tool for project and program planning (SB/SE)
- Tech Tip: Add IT to your pre-vacation planning (IT)
- End of year publishing requests due by July 14 (W&I)
- 2017 UNAX Awareness mandatory briefing available July 10 (PGLD)
- Shipping your packages correctly has never been easier (W&I)

#### Highlights from Services and Enforcement

- SB/SE identifies emerging issue involving family offices (SB/SE)

#### Leaders' Alert

- Talk with your employees about the retention standard (HCO)
- Managers and employees must certify elevated IT system privileges twice a year (IT)
- IR Payband high-risk review finds some errors in pay setting (HCO)
- View frequently asked questions about 2017 Bargaining Unit performance awards (HCO)
- Attend an HR Connect upgrade overview for managers and proxies (HCO)
- Know how to properly dispose employee performance files (HCO)

#### Poll Question

- Which is NOT a reason to use plain writing in government? (C&L)
- How many U.S. presidents have died on July 4? (C&L)

#### Spotlight

- Test your American civics knowledge (Independence Day) (C&L)

#### Webbie

- Understanding Fibromyalgia (EDI)
- Personality and temperament: understanding ourselves at work (EDI)
- Office 365 ProPlus upgrade begins to roll out in SB/SE (IT)
- Redesigned IRS.gov home page will launch in August (Online Services)
- Learn how Skillsoft training resources can enhance your career (HCO)

### **Media Relations**

#### Potential news releases for this week:

- Scams reminder – common scams
- IRS "Notices" in the mail to some taxpayers
- ETAAC 2017 Annual Report
- Missed the filing deadline? File soon

#### Potential releases for coming weeks:

- IRS appeals program pilots virtual service

## **National Public Liaison**

Mon. June 26 – 4 pm ET – Tamara Powell hosts practitioner feedback session on IRS transcript delivery.

Tue. June 27 – All Day – Electronic Tax Administration Advisory Committee (ETAAC) working session. (IRS HQ)

- Future State Session scheduled for 4 pm ET.

Wed. June 28 – 9 am – 12 noon – ETAAC Public Meeting. (Melrose Hotel)

## **Legislative Affairs**

NOT IRS AGENCY RECORDS



### **UPCOMING HEARINGS:**

On Thursday, June 29, 2017, at 10am the House Ways and Means Committee will hold a joint hearing of the Oversight Subcommittee and the Social Security Subcommittee on states and municipalities and the FICA tax (Time TBD). The Committee is inviting a witness from SSA, Marianna LaCanfora, Assistant Deputy Commissioner for Retirement and Disability Policy, as well as a witness from the National Council for State Social Security Commissioner (TBD). The IRS witness will be Sunita Lough, Commissioner, Tax Exempt/Government Entities. The hearing will be held at 10:00 am, in room 1100 Longworth House Office Building.

On Wednesday, July 26, 2017, a hearing is tentatively scheduled to be held before the Subcommittee on Financial Services and General Government, Senate Appropriations Committee on the Fiscal Year 2018 budget. The hearing time and location are TBD. Witness: Commissioner, John Koskinen is scheduled to testify

## **Social Media**

## **Visual Education and Communications**

### **Internal Programs**

#### **1. Video to Desk-top – Live or Recorded Events:**

Chief Counsel Criminal Tax Town Hall @1111 – Polycom/Stream Live (06/27)

Description: The Criminal Tax Town Hall will provide Criminal Tax (CT) attorneys/personnel information and updates regarding relevant administrative, substantive, and technical issues concerning CT matters, including the state of the IRS/Counsel/CT, hiring/staffing, employee engagement/outreach; policy issues; and work-product concerns/issues. The Town Hall panelists will include CT executives, Senior Level Counsel, as well as a guest executive speaker yet to be determined. 2017 CT Town Hall Outline I. Introduction (Ted) A. Word from Deputy Chief Counsel (Operations) Debra Moe II. Administrative Matters: A. General State of Criminal Tax 1. State of CT A. Use of Field Attorneys 2. Hiring/Staffing: A. Intro New Attorneys since Aug. 2015 Kansas City CT CLE i. San Diego Attorney Misty Cullen ii., Los Angeles Attorney Vanessa Hoppe iii. and Philadelphia Attorney Terra-Lynn Zentara B. Grade 15 Slots and C. Future Staffing 3. Employee Engagement/Outreach: A. Criminal Tax Connector Newsletter B. CT Suggestion Box ii. Employee suggestions/questions iii. Issues presented to ACAC C. Client Survey and D. Federal Employees Viewpoint (FEV).

Audience: The audience will be approximately 75 Chief Counsel attorneys in 35 locations. Participants will be attending in group viewing locations, and it's anticipated that there will only be 35-50 individual streams to desktop. A panel of 4 is expected, seated together on the stage (Ted Cronin; Rick Lunger; Martin Needle, and Debra Moe.

Deputy Commissioner Award Program 2017 @1111 – Live Polycom/Stream (06/28)

Topic: There will be an MC and the DCOS and DCSE will both speak. The Commissioner may speak as well. Topics will be limited to describing the awards being presented.

Audience: IRS Employees

#### **2. SABA Sessions (Captioning):**

EDI - Interpreting Demands and Control (06/27)

Audience: IRS manager and employees from the Disability Service located in various PODs around the country.

Informational/Training

TAS - TAS Career Learning Plan (CLP) (06/27)

Audience: General audience, all employees

Informational/Training

PDB - Servicewide Video Editorial Board Process (06/27)

Audience: The audience is a vast variety of Communicators throughout the Service.  
Informational/Training

HCO - At Your Service HCO Opening Session (06/28)

Audience: All HCO employees (potentially 1,600).  
Informational/Training

TEGE - Audit Hour - June 2017 (06/28)

Audience: IRS Employees  
Informational/Training

EDI - Fibromyalgia (06/28)

Audience: All levels of employment  
Informational/Training

TEGE - FY17 EO Awareness Training I (06/29)

Audience: IRS Employees  
Informational/Training

EDI - Personality and Temperament (06/29)

Audience: All levels of employment  
Informational/Training

TEGE - Lunch & Learn: Documenting Internal Controls (06/29)

Audience: IRS Employees  
Informational/Training

3. Other Projects: *(i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)*

Avid Edit - YouTube: English ITIN (06/26)

Avid Edit - YouTube: Spanish ITIN (06/26-06/29)

Avid Edit: YouTube Abbreviated Video Update (06/26, 06/28)

Avid Edit: Criminal Investigation (CI) YouTube Videos (06/27-06/30)

4. Servicewide Video Editorial Board (SVEB) – Internal:

Request VR#569 – LB&I Webinar - The ITIN Process

Target Audience: Internal/External. IRS employees and taxpayers, approx. 2000  
Informational message

Request VR#579 - IT Motivational/Informational YouTube Video During IT Live/Webcast Meeting on 7/24/17

Target Audience: Internal. UNS Senior Managers; approx. 40 Senior Managers  
Motivational/informational message

External Programs

1. Videos Uploaded to IRS YouTube Channels:

- English Videos:
  - ITIN
- Spanish Videos:
  - ITIN

### **Stakeholder Liaison Field**

#### Small Business Forums (SBF's)

(Congressional members named FYI only. They do not attend)

- Tues., June 27, Orlando, FL(F2F) GT
  - Congresswoman Stephanie Murphy and Congressman Ron Desantis
  - Topics: Future State; Identity Theft and Phishing

#### Practitioner Liaison Meeting (PLM's)

(Congressional members named FYI only. They do not attend)

- Wed., June 28, Reno, NV (F2F) AMS for DG
  - Congresswomen Dina Titus and Jackey Rosen. Congressmen Mark Amodei and Ruben Kihuen.
  - Payment Options and Other Online Tools; Private Debt Collection; Future State; Identity Theft and Phishing; ITIN Outreach - Path Act; Practitioner Data Breaches
- Thurs., June 29, Baltimore, MD (Virtual) DY
  - Congressmen Elijah Cummings and Jamie Raskin
  - Topics: Private Debt Collection; Dirty Dozen; Identity Theft and Phishing; Practitioner Data Breaches; Reporting abusive tax promotions and/or promoters - Lead Development Center; Sharing Economy

#### Congressional Meeting Sponsored by Los Angeles Local Taxpayer Advocate, Michael Shuler

- Thurs., June 29, Los Angeles (F2F) AMS for DG
  - Congresswomen Maxine Waters, Norma Flores, Mimi Walters, Grace Napolitano, Lucille Roybal-Allard. Congressmen Raul Ruiz, Dana Rohrabacher, J. Luis Correa, Alan Lowenthal, Pete Aguilar, Darrell Issa, Ken Calvert
  - Topics: Private Debt Collection; Tax Scheme Awareness; Identity Theft and Phishing; Practitioner Data Breaches; ITIN Outreach – Path Act

#### Other Practitioner Meetings

(Congressional members named FYI only. They do not attend)

- Mon., June 26, Moline, IL (F2F) CEC  
Event Title: 2017 IAAI Convention
  - Congresswomen Cheri Bustos and Congressman Rodney Davis
  - Topics: Sharing Economy, Correspondence Exams, Private Debt Collection, Payment Options and Other Online Tools

Wed., June 28, Reno, NV (F2F) AMS for DG

Event Title: 35th Annual California Society of Enrolled Agent Super Seminar

- Congresswomen Dina Titus and Jackey Rosen. Congressmen Mark Amodei and Ruben Kihuen.

- Topics: Automated Underreporter Program, Changes to OIC Policy; Payment Options and Other Online Tools, EITC and Refundable Credits Returns, Private Debt Collection, Tax Scheme Awareness, Annual Filing Season Program, Direct Pay, EITC Due Diligence, Form 8300, Identity Theft and Phishing, Office of Professional Responsibility, Payment Options, Practitioner Data Breaches, Reporting abusive tax promotions and/or promoters - Lead Development Center



# **Communications and Liaison – Weekly Activity Report**

## **Week of July 10, 2017**

### **Internal Communications**

#### IRS Headlines

- Mandatory briefings now available (HCO)
- When a widespread emergency hits, visit IRS.gov's Employee Emergency News page (AWSS)
- Join Leave Bank now through August 11 (HCO)
- HR Connect to get an upgrade on July 18 (HCO)
- Make sure you post night pay differential correctly (HCO)

#### Leaders' Alert

- Complete the Critical Job Elements Form 6774 annually with your employees (HCO)
- Prepare for July 18 HR Connect upgrade (HCO)
- Review telework criteria to ensure your employees are eligible to participate (HCO)
- Connecting personally owned mobile devices to IT resources is prohibited (IT)

#### Poll questions

- What resource links users to short, self-help video tutorials on common workplace technology? (IT)
- What is the resource that can help you identify level of burden when making changes to your programs or processes? (SB/SE)

#### Spotlight

- Night of Nights (C&L)
- Sister cities (C&L)

#### Daily News (webbies)

- See how workgroups around the Service engage their people (HCO)
- And we all fall down—Don't walk and text (AWSS)
- Protect taxpayers and yourself: Keep sensitive data locked up (AWSS)

### **Media Relations**

#### Potential news releases for this week:

- Missed the filing deadline? File soon
- Security Summit: Don't take the bait campaign begins

#### Potential releases for coming weeks:

- IRS notices/letters in the mail
- IRS appeals program pilots virtual service
- Additional LITC grant recipients announced
- Small business Thursday: employee vs. independent contractor
- Check your withholding

### **National Public Liaison**

Tue July 11, Wed July 12, Thu July 13 -- Orlando Nationwide Tax Forum. Hilton Orlando.

- W&I Commissioner Ken Corbin keynotes on Tuesday at 1:30 ET.

Wed July 12, 1 p.m. ET – Outreach and Education Leadership call.

Tue July 18, Wed July 19 – Security Summit Co-Leads Meeting. Room 3313.

- Commissioner Koskinen addresses summit Tuesday at 9 a.m. ET.
- CFO session on IRS Strategic Plan Tuesday at 10:15 a.m. ET.

Tue July 18, Wed July 19 – Internal Revenue Service Advisory Council (IRSAC) working session.

Thu July 20, 9 a.m. ET – Monthly NPL Practitioner Meeting – Special Session on Appeals Topics. Room 2116.

Commissioner Koskinen meets with group at 9 a.m. ET.

### **Legislative Affairs**

NOT IRS AGENCY RECORDS



### **UPCOMING MEETINGS:**

NOT IRS AGENCY RECORDS



### **DISTRICT CONGRESSIONAL LIAISON BRANCH MEETINGS:**

On July 10, 2017 [9 a.m. to 1 p.m.], Emma Sánchez, Legislative Affairs and representative of CI (TBD) will participate in a Senior Fair, sponsored by Rep. David Young (IA-03), in Waukegan, IA Subject: identity theft and the IRS phone scam.

#### UPCOMING HEARINGS:

On Wednesday, July 26, 2017, a hearing is tentatively scheduled to be held before the Subcommittee on Financial Services and General Government, Senate Appropriations Committee on the Fiscal Year 2018 budget. The hearing time and location are TBD. Witness: Commissioner, John Koskinen is scheduled to testify

#### **Social Media**

#### **Visual Education and Communications**

##### Internal Programs

##### 1. Video to Desk-top – Live or Recorded Events:

Criminal Investigation (CI) Virtual Town Hall – Live Stream (07/13)  
Topic: CI virtual town hall for CI Chief and Deputy Chief to address CI employees.  
Audience: All CI employees.

##### 2. SABA Sessions (Captioning):

LB I - Hidden Biases of Good People or Difficulty Conversations (07/11)  
Audience: LB&I Employees and Managers  
Informational/Training

LB&I - LB&I All Employee Campaign Meetings (07/12)  
Audience: LB&I Employees  
Informational/Training

IT - IT Connections Hour: Time Management Tools: To-do List, Calendars, Smartphones & More (07/13)  
Audience: The audience is Information Technology and other business unit employees (all grade levels) and managers who are located nationwide.  
Informational/Training

EDI - Leveraging Differences by Playing to Your Strengths (07/13)  
Audience: All Levels of Employment  
Informational/Training

3. Other Projects: *(i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)*

Avid Edit: Criminal Investigation (CI) YouTube Videos (07/11-07/14)

External Programs

1. Videos Uploaded to IRS YouTube Channels:

- English Videos:
  - ITIN (Pending Approval)
- Spanish Videos:
  - ITIN (Pending Approval)

**Stakeholder Liaison Field**

Small Business Forums (SBF's)  
(Congressional members named FYI only. They do not attend)

- Thur., July 13, Milwaukee, WI (F2F) MM for CEC
  - Congressman James Sensenbrenner Jr., Paul Ryan, and Congresswoman Gwen Moore
  - Topics: Automated Underreporter Program (AUR); Changes to OIC Policy; Correspondence Exams; Payment Options and Other Online Tools; Private Debt Collection; Tax Scheme Awareness; Dirty Dozen; Online Payment Agreements; Payment Options
- Wed., July 19, Pittsburgh, PA (Virtual) MR
  - Congressmen Mike Kelly, Tim Murphy and Keith Rothfus
  - Topics: Identity Theft & Phishing
- Wed., July 19, Portland, OR (F2F) KH
  - Congresswoman Suzanne Bonaci and Congressmen Greg Walden, Earl Blumenauer, Kurt Scherder
  - Topics: Dirty Dozen; Identity Theft and Phishing; Tax Security Awareness
- Fri., July 21, Tulsa, OK (Virtual & F2F) MM for CEC

- Congressman Jim Bridenstine
- Topics: Private Debt Collection; New Secure Access Process for Get Transcript; Online Tax Calendar; Sharing Economy; Technology (Utilized for Event)

#### Practitioner Liaison Meeting (PLM's)

(Congressional members named FYI only. They do not attend)

- Tues., July 11, Phoenix, AZ (F2F) GT
  - Congressmen Rueben Gallego David Schweikert, Andy Biggs, Trenton Franks, and Paul Gosar, and Congresswoman Krysten Sinema
  - Topics: Changes to OIC Policy; Field Audit Process; Private Debt Collection; Tax Scheme Awareness; Practitioner Data Breaches
- Thur., July 13, Charleston, WV (F2F & Virtual) MR
  - Congressman Alex Mooney
  - Topics: 9015: Additional Medicare Tax; Foreign Account Tax Compliance Act (FATCA); Identity Theft and Phishing; Technology (Utilized for Event); Third Party Payers, Data Theft
- Thur, July 13, Denver, CO (F2F) KH
  - Congresswoman Diana DeGette
  - Topics: Data Breach & Identity Theft
- Fri., July 14, Oklahoma City, OK (F2F) MM for CEC
  - Congressmen Steve Russell and Tom Cole
  - Topics: Changes to OIC Policy; Correspondence Exams; Field Audit Process; Payment Options and Other Online Tools; Private Debt Collection; Taxpayer Digital Communications (TDC); Annual Filing Season Program; Appeals Judicial Approach and Culture (AJAC); Collection User Fees; Direct Pay; E-Services Authentication Process; Foreign Account Tax Compliance Act (FATCA); Foreign Bank and Financial Accounts (FBAR); Form 8300 - Report of Cash Payments over \$10000 Received in a Trade or Business; Identity Theft and Phishing; New Secure Access Process for Get Transcript; Online Payment Agreements; Online Tax Calendar; Payment Options; Practitioner Data Breaches; Tax Security Awareness
- Wed, July 19, Des Moines, IA (F2F) JHL
  - Congressmen David Young
  - Topics: Correspondence Exams; Private Debt Collection; Taxpayer Digital Communications (TDC); Identity Theft and Phishing; Practitioner Data Breaches; Sharing Economy
- Thur, July 20, Columbus, OH (F2F) JHL
  - Congresswoman Joyce Betty
  - Topics: FY17 4th qtr. outreach priorities, W-2 Verification Pilot

## Other Practitioner Meetings

(Congressional members named FYI only. They do not attend)

- Mon., July 10, Little Rock, AR (F2F) MM for CEC  
Event Title: Central Chapter Arkansas CPA Society Monthly Meeting
  - Congressman French Hill
  - Topics: Practitioner Data Breaches; Practitioner Priority Services; Private Debt Collection
- Wed., July 19, Houston, TX (F2F)  
Event Title: Houston Regional Practitioner Meeting
  - Congresswoman Shelia Jackson Lee, Congressmen John Colberson, Ted Poe, Gene Green and Al Green
  - Topics: CAF - Third Party Authorizations; Identity Theft and Phishing; Practitioner Data Breaches; Refundable Credits PATH Due Diligence and Tax Law changes TBD; Third Party Payers

## Congressional

- Sat., July 15, Sanger, CA (F2F) KD for DG
  - Congressman David Valadao
  - Topics: Payment Options and Other Online Tools; Employment Tax Issues
- Wed., July 19, Harrisburg, PA (F2F)
  - Congressman Scott Perry
  - Topics: Independent Contractor or Employee

## National Webinars

(Congressional members named FYI only. They do not attend)

- Wed., July 19, (Virtual) KD for DG
  - All Congressmen and Congresswomen
  - Topics: Office of Professional Responsibility (OPR)

## SLF Coordinated Web Conferences

(Congressional members named FYI only. They do not attend)

- Thurs., July 20, (Virtual) KD for DG
  - All Congressmen and Congresswomen
  - Topics: Understanding Tax Scams and Abusive Schemes

# **Communications and Liaison – Weekly Activity Report**

## **Week of July 17, 2017**

### **Internal Communications**

#### IRS Headlines

- Make the switch to EEFax (IT)
- Connecting personally owned mobile devices to IT resources is prohibited (IT)
- Learn the annual leave rules that may apply to you (HCO)
- Plan ahead: SharePoint sites will be down 7/28-31 (IT)

#### Leaders' Alert

- Do your part: Participate in risk identification activities (CFO)
- Document when employees vacate workspace due to separation (HCO)
- Training available on the recently awarded asset and locator service (RAAS)
- Reminder: Take the cultural competency training (EDI)
- Encourage your employees to immediately re-enroll their SmartID card if notified (AWSS)

#### Poll questions

- Which item is a challenge to donate through Feds Feed Families? (AWSS)
- Will my SharePoint site be restricted due to the upcoming SharePoint 2013 upgrade? (IT)

#### Spotlight

- The circle of kindness (LB&I)

#### Daily News (webbies)

- HCO's Junior Analyst Cohort team provides valuable resources to organizations in need (HCO)

### **Media Relations**

#### Potential news releases for this week:

- Security Summit: Don't take the bait campaign continues
- Missed the filing deadline? File soon
- IRS notices/letters in the mail
- Small business Thursday: employee vs. independent contractor
- Check your withholding

#### Potential releases for coming weeks:

- Security Summit: Don't take the bait campaign continues
- IRS appeals program pilots virtual service
- Additional LITC grant recipients announced
- Understanding the estimated tax penalty
- Highway use tax return – reminder for truckers

### **National Public Liaison**

Tue. July 18, 9 am ET – Commissioner Koskinen welcomes Security Summit participants to co-leads meeting. Room 3313.

Thu. July 20, 9 am ET – Commissioner Koskinen meets with tax professional partners. Subject: Changes involving Appeals meetings. Room 2116.

Tue. July 25, 1:30 pm CT – Commissioner Koskinen delivers keynote address at Dallas IRS Tax Forum. Hilton Anatole.

- 11 am CT – Press availability with Commissioner. Hilton Anatole.

### **Legislative Affairs**

NOT IRS AGENCY RECORDS



### **UPCOMING MEETINGS:**

NOT IRS AGENCY RECORDS



### **UPCOMING HEARINGS:**

On Tuesday, July 25, 2017, the Oversight Subcommittee, House Ways and Means Committee will hold a hearing on IRS document retention. The hearing is scheduled for 10:00 am, in room 1100 of the Longworth House Office Building.

Witnesses:

Jeff Tribiano, Deputy Commissioner for Operations Support

Edward Killen, Chief Privacy Officer, Privacy, Governmental Liaison and Disclosure

Greg Coots from TIGTA will also testify.

On Wednesday, July 26, 2017, a hearing is scheduled to be held before the Subcommittee on Financial Services and General Government, Senate Appropriations Committee on the Fiscal Year 2018 budget. The hearing is scheduled for 10:00 am, in room 138 of the Dirksen Senate Office Building.

Witness: Commissioner, John Koskinen is scheduled to testify

### **Social Media**



## **Visual Education and Communications**

### **Internal Programs**

#### **1. SABA Sessions (Captioning):**

Appeals - Form 3870 Adjustments (07/18)

Audience: All Audience members will be GS-13/14 Settlement Officers with extensive knowledge of the subject. IRS jargon is appropriate.

Informational/Training

LBI - No Transcript - Losses and the Foreign Tax Credit (07/18)

Audience: LB&I Employees

Informational/Training

Appeals - APS CPE: OIC-Doubt as to Liability Carding In and Closing (07/19)

Audience: All attendees are Appeals Tax Examiners, GS-0592 -5/6/7/8 Appeals/IRS jargon is appropriate.

Informational/Training

HCO - Division Leaders Chat: Workforce Relations (07/19)

Audience: This session is open to all HCO employees

Informational/Training

LBI - No Transcript - Advance Pricing Agreements for Tangible Goods Transactions - Inbound Revenue Procedure 2015-41 (07/19)

Audience: LB&I Employees

Informational/Training

Appeals - APS CPE: OIC-Doubt as to Liability Carding In and Closing (07/20)

Audience: All attendees are Appeals Tax Examiners, GS-0592 -5/6/7/8 Appeals/IRS jargon is appropriate.

Informational/Training

HCO - Leadership Behavior Session (07/20)

Audience: The session is for employees that wish to become managers or advance in management. It includes managers, Leadership Succession Review participants at all grade levels.

Informational/Training

EDI - EEO Overview (07/20)

Audience: All levels of employment

Informational/Training

#### **2. Other Projects: *(i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)***

TAS - Most Litigated Issues - Session 2 Taping (07/17)

Topic: The National Taxpayer Advocate will discuss 4 Most Litigated Issues with an Attorney Advisor and an LITC Director. Topics and taping dates: Trade or Business- Megan, Bob Nassau, NTA and Gross income: Megan, Bob Nassau, NTA = July 17

Audience: All TAS employees

Avid Edit: Criminal Investigation (CI) YouTube Videos (07/18-07/21)

Avid Edit: TAS - Most Litigated Issues Video (07/18)

Avid Edit: YouTube Abbreviated Video Update (07/19)

### 3. Servicewide Video Editorial Board (SVEB) – Internal:

Request VR#580 – HCO Treasury Engagement Road Show with IRS Leadership  
Target Audience: Internal. IRS managers and executives – nationwide, approximately 7800  
Employee Training

Request VR#581 – 90th Anniversary Virtual Town Hall with Former Chiefs of Appeals Saba Session  
Target Audience: Internal. All Appeals employees nationwide; approx. 1000  
Informational message

Request VR#584 – CC Expert Witness training via Webcast  
Target Audience: The target audience includes all attorneys and attorney managers in both the field and associate offices. The expected audience size is up to 1500. However, group viewing locations will be established in the national office and 50 field offices, resulting in an anticipated 200 or fewer individual streams to desktop.  
Internal employee training

Request VR#585 – TAS Making a Difference Video Series (total of 9 videos)  
Target Audience: Internal Audience: All TAS employees  
Informational message

### External Programs

#### 1. Videos Uploaded to IRS YouTube Channels:

- English Videos:
  - ITIN
- Spanish Videos:
  - ITIN

#### 2. Servicewide Video Editorial Board (SVEB) – External:

Request VR#582 – SBSE Reporting Foreign Financial Accounts Webinar  
Target Audience: External – tax professionals, audience size: 3,000-5,000  
Educational message

Request VR#583 – CI Nationally Coordinated Investigations Unit SEC Microcap Training  
Target Audience: Attendees will include employees of IRS, IRS-CI, SEC, Department of Justice- Tax, US Postal Inspection Service, and FBI. Audience Size: Approximately 38 attendees and 40 remote participants who will view broadcast of training.  
Employee training

### **Stakeholder Liaison Field**

#### **Small Business Forums (SBF's)**

(Congressional members named FYI only. They do not attend)

- Wed., July 19, Portland, OR (F2F) **KH**
  - Congresswoman Suzanne Bonaci and Congressmen Greg Walden, Earl Blumenauer, Kurt Scherder
  - Topics: Dirty Dozen; Identity Theft and Phishing; Tax Security Awareness
- Fri., July 21, Pittsburgh, PA (Virtual) **MAR**
  - Congressmen Mike Kelly, Tim Murphy and Keith Rothfus
  - Topics: Identity Theft & Phishing
  - Area Wide SBF
- Fri., July 21, Tulsa, OK (Virtual & F2F) **CEC**
  - Congressman Jim Bridenstine
  - Topics: Private Debt Collection; New Secure Access Process for Get Transcript; Online Tax Calendar; Sharing Economy; Technology (Utilized for Event)

### **Practitioner Liaison Meeting (PLM's)**

(Congressional members named FYI only. They do not attend)

- Wed, July 19, Des Moines, IA (F2F) **KW**
  - Congressmen David Young
  - Topics: Correspondence Exams; Private Debt Collection; Passport Revocation; Identity Theft and Phishing; Practitioner Data Breaches; View Account Online; Charitable Contributions
- Thur, July 20, Columbus, OH (Virtual) **KW**
  - Congresswoman Joyce Betty
  - Topics: Online Account Information for Balance Due; "Don't Take The Bait", National Tax Security Summer Summit; Tax Practitioner Data Breach; F2290 due dates; W-2 Verification Pilot
- Tues, July 25, Fresno, CA (Partly Virtual) **JHB for DG**
  - Congressman David Valadao
  - Topics: Payment Options and Other Online Tools, Private Debt Collection

### **Other Practitioner Meetings**

(Congressional members named FYI only. They do not attend)

- Tues., July 18, Prescott, AZ (F2F) **GT**

**Event Title:** ASCPA North Central Chapter Meeting

  - Congressman Paul Gosar
  - Topics: CAF - Practitioner Data Breaches; Private Debt Collection; Tax Scheme Awareness
- Wed., July 19, Glen Mills, MD (F2F) **MAR**

**Event Title:** PSTAP Southeast Chapter Meeting

  - Congressmen Patrick Meehan, A. Dutch Ruppersberger
  - Topics: CAF - Identity Theft and Phishing; Practitioner Data Breaches; AUR; Correspondence Exam; Private Debt Collection
- Wed., July 19, Houston, TX (F2F) **GT**

**Event Title:** Houston Regional Practitioner Meeting

  - Congresswoman Shelia Jackson Lee, Congressmen John Colberson, Ted Poe, Gene Green and Al Green

- Topics: CAF - Third Party Authorizations; Identity Theft and Phishing; Practitioner Data Breaches; Refundable Credits PATH Due Diligence and Tax Law changes TBD; Third Party Payers
- Fri., July 21, San Luis Obispo, CA (F2F) **JHB for DG**
  - Event Title:** CalCPA Central Coast Chapter San Luis Obispo Roundtable
  - Congressman Salud Carbajal
  - Topics: Field Audit Process, Examination Process and other updates in Examination division
- Wed., July 26, Layton, UT (Virtual) **KH**
  - Event Title:** Automated Underreporter for CPAAcademy
  - Congressman Rob Bishop
  - Topics: Underreporter Program
- Thur., July 27, Santa Fe, NM (F2F) **GT**
  - Event Title:** Santa Fe Regional Practitioner Meeting
  - Congressman Ben Luján
  - Topics: CAF - Third Party Authorizations; Identity Theft and Phishing; Practitioner Data Breaches; Refundable Credits PATH Due Diligence and Tax Law changes TBD; Third Party Payers

### **National Webinars**

(Congressional members named FYI only. They do not attend)

- Wed., July 19, (Virtual) **JHB for DG**
  - All Congressmen and Congresswomen
  - Topics: Office of Professional Responsibility (OPR)
    - SLF Support: Moderator and Marketing, CE Credits, provide technical support.

### **SLF Coordinated Web Conferences JHB for DG**

(Congressional members named FYI only. They do not attend)

- Thurs., July 20, (Virtual)
  - All Congressmen and Congresswomen
  - Topics: Understanding Tax Scams and Abusive Schemes
    - 4000 registered so far.
    -

# **Communications and Liaison – Weekly Activity Report**

## **Week of July 24, 2017**

### **Internal Communications**

#### Commissioner News

- Commissioner Koskinen visits Dallas employees 7/24 (C&L)

#### Headlines

- Training available on the recently awarded asset and locator service contracts (RAAS)
- Updated Outside Employment system begins rollout on July 26 (HCO)
- Whistleblower Office collects \$3.4 billion, approves \$465 million to whistleblowers (WO)

#### Leaders' Alert

- Records Management Checklist required for exiting interns (PGLD)

#### Poll Question

- According to the National Taxpayer Advocate's FY 2018 Objectives Report to Congress, what are key priority issues TAS will address in fiscal year 2018? (TAS)

#### Spotlight

- Oh, the opportunities! (usefulness of apps) (IT)

#### Webbies

- Understand the reasonable accommodations process (EDI)
- Visit the Office 365 Resource Center for a video on importing your Outlook PST files (IT)

### **Media Relations**

#### Potential news releases for this week:

- IRS appeals program pilots virtual service
- Security Summit: Don't take the bait campaign continues

#### Potential releases for coming weeks:

- Security Summit: Don't take the bait campaign continues
- Additional LITC grant recipients announced
- Understanding the estimated tax penalty
- Highway use tax return – reminder for truckers

### **National Public Liaison**

Tuesday July 25 – Thursday July 27 – Dallas Nationwide Tax Forum. Hilton Anatole.

- 7/25: Commissioner Koskinen press conference at 11 a.m. CT.
- 7/25: Commissioner Koskinen delivers keynote address at 1:30 p.m. CT.

### **Legislative Affairs**

NOT IRS AGENCY RECORDS



## UPCOMING HEARINGS:

On Tuesday, July 25, 2017, the Oversight Subcommittee, House Ways and Means Committee will hold a hearing on IRS document retention. The hearing is scheduled for 10:00 am, in room 1100 of the Longworth House Office Building.

Witnesses:

Jeff Tribiano, Deputy Commissioner for Operations Support

Edward Killen, Chief Privacy Officer, Privacy, Governmental Liaison and Disclosure

Gregory Kutz, Assistant Inspector General for Audit Management Services and Exempt Organizations from TIGTA will also testify.

On Wednesday, July 26, 2017, a hearing is scheduled to be held before the Subcommittee on Financial Services and General Government, Senate Appropriations Committee on the Fiscal Year 2018 budget. The hearing is scheduled for 10:00 am, in room 138 of the Dirksen Senate Office Building.

Witness: Commissioner, John Koskinen is scheduled to testify

## **Social Media**

## **Visual Education and Communications**

### **Internal Programs**

#### 1. Video to Desk-top – Live or Recorded Events:

##### Chief Counsel Expert Witness – Live Stream (07/27)

Topic: Training is to give Chief Counsel Attorneys a comprehensive overview on the use of expert witnesses in a Tax Court trial. The IVT will emphasize the various rules implicated when using testifying experts in the Tax Court such as the Rules of Practice and Procedure of the United States Tax Court, the Federal Rules of Evidence and the Federal Rules of Civil Procedure. The panelists will discuss how to prepare an expert for trial including properly vetting that expert prior to trial. The panelists will also discuss some problems you may encounter with respect to the testifying expert including issues that may arise during the trial and potential solutions to these pitfalls. The IVT will also cover the process for hiring an expert. The panelists will explore the pros and cons of using an IRS employee as a testifying expert. They will also consider appropriate ways to handle the opposing party's expert on voir dire and cross examination.

Audience: Includes all attorneys and attorney managers in both the field and associate offices. The expected audience size is up to 1500.

#### 2. SABA Sessions (Captioning):

##### HCO - HCO Focus Day: Strategic Thinking (07/26)

Audience: All HCO Employees  
Informational/Training

IT - AD PM Roundtable: Cybersecurity (07/26)  
Audience: Project Managers in Applications Development as well as managers.  
Informational/Training

TEGE - Third Party Arrangements (07/27)  
Audience: IRS Employees  
Informational/Training

PDB - Social Media Measuring Effectiveness (07/27)  
Audience: Vast variety of Communicators throughout the Service.  
Informational/Training

EDI - Reasonable Accommodation (07/27)  
Audience: All levels of employment  
Informational/Training

3. Other Projects: *(i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)*

Avid Edit: TAS - Most Litigated Issues Video (07/24-07/25)

Avid Edit: Criminal Investigation (CI) YouTube Videos (07/25-07/28)

Avid Edit: YouTube Abbreviated Video Update (07/27)

4. Servicewide Video Editorial Board (SVEB) – Internal:

VR#569 – LB&I ITIN process webinar  
Target Audience: Internal/External. IRS employees and taxpayers  
Informational message

**Stakeholder Liaison Field**

**In addition to the specific events listed below, additonal SLF work for the weeks of July 23, 2017 and July 30, 2017 includes:**

- 15 Leveraged Small Business Workshops (LSBW)
- 11 Relationship Management Meetings
- 7 Industry Events
- 4 Local Web Conferences
- 2 Stakeholder Relationship Management Local Council Meetings (SRMLC)
- 2 Small Business Regulatory Enforcement Fairness Act (SBREFA)
- 2 Internal Stakeholder Meetings (Examination and MidSouth Disaster Briefing)
- 1 National Tax Forum - Dallas

**Stakeholder Liaison Field**

**Small Business Forums (SBF's)**

(Congressional members named FYI only. They do not attend)

- Wed., August 3, Tampa, FL (F2F) **EDL for GT**
  - Congresswoman Kathy Castor, Congressman Dennis Ross and Charlie Christ
  - Topics: Live demo of the online resources for small business owners on IRS.gov - i.e., small biz tax center, IRS video portal (specifically the virtual tax workshop), OPA, direct pay, e-news for small biz, online tax calendar, EFTPS

### **Practitioner Liaison Meeting (PLM's)**

(Congressional members named FYI only. They do not attend)

- Tues, July 25, Fresno, CA (Partly Virtual) **DG**
  - Congressman David Valadao
  - Topics: Don't Take the Bait (National Tax Security Summer Summit), Form 2290, Heavy Highway Vehicle Use Tax, Online Account Information for Balance Due, Private Debt Collection, Tax Scheme Awareness, Taxpayer Digital Communications (TDC)

### **Other Practitioner Meetings**

(Congressional members named FYI only. They do not attend)

- Wed., July 26, Rockford, IL (F2F) **CE**  
**Event Title:** ILCPA Rockford Meeting
  - Congressmen Adam Kinzinger, Randy Hultgren and Congresswoman Robin Kelly
  - Topics: Don't Take the Bait (National Tax Security Summer Summit), Form 2290, Heavy Highway Vehicle Use Tax, Online Account Information for Balance Due, Private Debt Collection, Tax Scheme Awareness, Taxpayer Digital Communications (TDC)
- Thur., July 27, Layton, UT (Virtual) **KH**  
**Event Title:** Automated Underreporter for CPA Academy
  - Congressman Rob Bishop
  - Topics: Underreporter Program
- Thur., July 27, Santa Fe, NM (F2F) **EDL for GT**  
**Event Title:** Santa Fe Regional Practitioner Meeting
  - Congressman Ben Luján
  - Topics: CAF - Third Party Authorizations, Identity Theft and Phishing, Practitioner Data Breaches; Refundable Credits, Due Diligence Rules, Working with the IRS, Don't take the Bait.
- Mon., July 31, Charlotte, NC (F2F & Virtual) **DY**  
**Event Title:** 2017 Carolinas Tax Professionals Seminar
  - Congresswoman Alma Adams
  - Topics: Collection User Fees, Online Payment Agreements, Annual Filing Season Program, Correspondence Exams, Direct Pay, Employment Tax Issues, E-Services Authentication Process, Identity Theft and Phishing, New Secure Access Process for Get Transcript, Office of Professional Responsibility (OPR), Payment Options, Practitioner Data Breaches, Practitioner Priority Service, Private Debt Collection, Rules of Representation (RPO), Sharing Economy, and Social Media



- Thur., Aug. 4, El Paso, TX (F2F) **EDL for GT**
  - Event Title:** EL Paso Regional Practitioner Meeting
  - Congressman Beto O'Rourke
  - Topics: CAF - Third Party Authorizations, Identity Theft and Phishing, Practitioner Data Breaches; Refundable Credits, Due Diligence Rules, Working with the IRS, Don't take the Bait.

#### **GL/SLF Coordinated Governmental Liaison – Congressional**

- Tues., Aug. 1 Nashville, TN (F2F) **CEC**
  - Terri Knuckles, Local Taxpayer Advocate for Tennessee, Jacqueline Nielson, Congressional District Liaison for Tennessee, and Donna Wess, Local Taxpayer Advocate for Memphis, Tennessee will attend
  - Topics: Don't Take the Bait (National Tax Security Summer Summit); Online Account Information for Balance Due; Tax Scheme Awareness; Taxpayer Digital Communications
  - Additional Information: This Middle TN Congressional Seminar is sponsored and coordinated by local Nashville TAS Terri Knuckles. Also speaking will be; Jacqueline Nielson-IRS Congressional District Liaison, Donna Wess-Local Taxpayer Advocate (Memphis), Susan Gainous-Stakeholder Liaison, Elise Williams-Taxpayer Advocate Group Manager (Nashville), Dawn Witherspoon, Case Advocate, TAS (Nashville). Congressional staff will be in attendance from the offices of; Senator Lamar Alexander and Senator Bob Corker.

# **Communications and Liaison – Weekly Activity Report**

## **Week of July 31, 2017**

### **Internal Communications**

#### IRS Headlines

- More options available to self-identify a disability (EDI)
- Don't be a firefighter at work (AWSS)

#### Other News

- Spirit of IRS: Why review a little when you can review a lot? (SB/SE)
- IRS Cares: The epic journey of Chad Hancey's kidney (C&L)

#### Poll Question

- What action can you take on the Employee Personal Page? (AWSS)
- According to the 2016 IRS Data Book, which state in the U.S. had the least amount of gross tax collections? (RAAS)

#### Spotlight

- CPR/IRS Automated External Defibrillation Life-Saver (C&L)

#### Webbie

- Don't miss the latest Office of Servicewide Penalties quarterly discussion session

### **Media Relations**

#### Potential news releases for this week:

- Security Summit: Don't take the bait campaign
- Highway use tax – reminder for truckers

#### Potential releases for coming weeks:

- Security Summit: Don't take the bait campaign continues
- Additional LITC grant recipients announced
- Understanding the estimated tax penalty

### **National Public Liaison**

August 8 - Commissioner Koskinen will speak at the National Association of Tax Professionals (NATP) 36th Annual National Conference.

August 9 – The Latino Tax Professional Association is hosting their 2017 National Convention in Las Vegas, Nevada. National Taxpayer Advocate Nina Olsen, Return Preparer Director Carol Campbell, ITIN Chief Sharon Bradley will be speaking at the event.

August 9 – W&I Deputy Commissioner David Alito is scheduled to speak at the Reporting Agent Forum at the New Carrollton Federal Building in Lanham, Maryland.

### **Legislative Affairs**

NOT IRS AGENCY RECORDS



NOT IRS AGENCY RECORDS



**NEW DISTRICT CONGRESSIONAL LIAISON BRANCH MEETINGS:**

NOT IRS AGENCY RECORDS



**UPCOMING MEETINGS:**

Currently, there are no meetings scheduled.

**UPCOMING HEARINGS:**

Currently, there are no hearings scheduled.

**Social Media**

**Visual Education and Communications**

**Internal Programs**

**1. SABA Sessions (Captioning):**

**SB/SE - Addressing Performance and Conduct Part 1 (07/31)**  
Informational/Training

**SB/SE - Addressing Performance and Conduct Part 2 (07/31)**  
Informational/Training

**SB/SE - Coaching, Mentoring and CLP (08/01)**

Informational/Training

**HCO - 2017 HCO Head of Office Awards Virtual Ceremony (08/02)**

Audience: All HCO Employees

Informational/Training

**LB&I Schedule UTP Training Part 1 (08/02)**

Audience: LB&I Employees

Informational/Training

**LB&I - Schedule UTP Training Part 2 (08/02)**

Audience: LB&I Employees

Informational/Training

**TEGE - EO CPE - Self Dealing (08/03)**

Audience: IRS Employees

Informational/Training

**SB/SE - Managing Employees Impacted by Health and Stress Issues (08/03)**

Informational/Training

**TEGE - EO CPE - PATH Act (08/03)**

Audience: IRS Employees

Informational/Training

**SB/SE - Change the Constant (08/04)**

Informational/Training

2. **Other Projects:** (*i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.*)

**HCO Treasury Engagement Road Show with IRS Leadership Taping @1111 (08/01)**

**Avid Edit: TAS - Most Litigated Issues Video (08/01-08/03)**

**Avid Edit: HCO Treasury Engagement Road Show with IRS Leadership (08/02-08/03)**

**Avid Edit: Criminal Investigation (CI) YouTube Videos (08/04)**

3. **Servicewide Video Editorial Board (SVEB) – Internal:**

**Request VR#587 – HCO Overview of Work Life, Recognition and Leave Sharing Programs Video**

Target Audience: Internal audience for All IRS employees; potentially all 80,000 IRS employees

Informational Message

**External Programs**

1. **Servicewide Video Editorial Board (SVEB) – External:**

## **YouTube Request #147 - How to Voluntarily Correct the Classification of Your Workers**

Target Audience: External business owners, nationally and internationally and tax practitioners, payroll professionals

Audience size: Five thousand plus based on the number of views of the previous videos.

Informational Message

### **Stakeholder Liaison Field**

#### **Stakeholder Liaison Field – Weekly Activity Report Input For Weeks of July 30 and August 6, 2017**

**In addition to the specific events listed below, additional SLF work for the week of July 30, 2017 include:**

- 5 Leveraged Small Business Workshops (LSBW)
- 2 Relationship Management Meetings
- 3 Industry Events
- 2 Local Web Conferences
- 1 Small Business Regulatory Enforcement Fairness Act (SBREFA)

### **Stakeholder Liaison Field**

#### **Small Business Forums (SBF's)**

(Congressional members named FYI only. They do not attend)

- Wed., August 3, Tampa, FL (F2F) **GT**
  - Congresswoman Kathy Castor, Congressman Dennis Ross and Charlie Christ
  - Topics: Live demo of the online resources for small business owners on IRS.gov - i.e., small biz tax center, IRS video portal (specifically the virtual tax workshop), OPA, direct pay, e-news for small biz, online tax calendar, EFTPS

#### **Practitioner Liaison Meeting (PLM's)**

(Congressional members named FYI only. They do not attend)

- Tues., Aug. 8, Montana & Wyoming (Virtual) **KH**
  - All Montana and Wyoming Congressmen
  - Topics: Correspondence Exams; Practitioner Data Breaches and Don't Take the Bait campaign
- Thurs., Aug. 10, Fargo, ND (F2F) **DCB FOR KW**
  - Congressman Kevin Cramer
  - Topics: Correspondence Exams; Private Debt Collection; Practitioner Data Breaches and Don't Take the Bait campaign

#### **Practitioner Seminar/Working Together**

- Mon., July. 31, Charlotte, NC (F2F & Virtual) **DY**
  - Congresswoman Alma Adams
  - Topics: Collection User Fees, Online Payment Agreements, Annual Filing Season Program, Correspondence Exams, Direct Pay, Employment Tax Issues, E-Services Authentication Process, Identity Theft and Phishing, New Secure Access Process for Get Transcript,

Office of Professional Responsibility (OPR), Payment Options; Practitioner Data Breaches, Practitioner Priority Service, Private Debt Collection; Rules of Representation (RPO), Sharing Economy, Social Media and Heavy Highway Use Tax.

- This event will also include Live Assistance case resolution services by a team composed of Taxpayer Advocate, Exam and Collection representatives.

### **Other Practitioner Meetings**

(Congressional members named FYI only. They do not attend).

- Thur., Aug. 4, El Paso, TX (F2F) **GT**  
**Event Title:** El Paso Regional Practitioner Meeting
  - Congressman Beto O'Rourke
  - Topics: CAF - Third Party Authorizations, Identity Theft and Phishing, Practitioner Data Breaches; Refundable Credits, Due Diligence Rules, Working with the IRS, Don't take the Bait.
- N Tues., Aug. 8, Las Vegas, NV (F2F) **KD for DG**  
**Event Title:** 2017 Latino Tax Professionals Association National Convention
  - Congresswoman Dina Titus
  - Topics: Identity Theft and Phishing, ITIN Outreach Campaign, Payment Options, Practitioner Data Breaches, Tax Security Awareness
- Tues., Aug. 8, Farmington, NM (F2F) **GT**  
**Event Title:** Farmington Regional Practitioner Meeting
  - Congresswoman Michelle Lujan Grisham, Congressmen Stevan Pearce and Ben Lujan
  - Topics: Correspondence Exams, CAF - Third Party Authorizations, Early Interaction Initiative - FTD Alerts, EITC Due Diligence; Identity Theft and Phishing, Practitioner Data Breaches
- Tues., Aug. 8, Washington, D. C., (F2F) In Coordination With NPL  
**Event Title:** NATP National Convention
  - Congresswoman Eleanor Holmes Norton
  - Topics: Reporting only as an FYI. NATP will provide a booth for SL in their expo hall, in which policies, practices and procedures will be discussed with attendees. Commissioner Koskinen is scheduled to make a presentation during the conference.
- Thurs., Aug. 10, Huntsville, TX (F2F) **GT**  
**Event Title:** Huntsville Regional Practitioner Meeting
  - Congressman Kevin Brady, John Colberson, Ted Poe, Gene Green, Al Green and Congresswoman Shelia Jackson Lee
  - Topics: CAF - Third Party Authorizations; Practitioner Data Breaches; Refundable Credits, Due Diligence

### **GL/SLF Coordinated Governmental Liaison – Congressional**

- Tues., Aug. 1 Nashville, TN (F2F) **CEC**
  - Terri Knuckles, Local Taxpayer Advocate for Tennessee, (b) (6)  
(b) (6) Congressional District Liaison for Tennessee, and Donna Wess, Local Taxpayer Advocate for Memphis, Tennessee will attend

- Topics: Don't Take the Bait (National Tax Security Summer Summit); Online Account Information for Balance Due; Tax Scheme Awareness; Taxpayer Digital Communications
- Additional Information: This Middle TN Congressional Seminar is sponsored and coordinated by local Nashville TAS Terri Knuckles. Also speaking will be; Jacqueline Nielson-IRS Congressional District Liaison, Donna Wess-Local Taxpayer Advocate (Memphis), Susan Gainous-Stakeholder Liaison, Elise Williams-Taxpayer Advocate Group Manager (Nashville), Dawn Witherspoon, Case Advocate, TAS (Nashville). Congressional staff will be in attendance from the offices of; Senator Lamar Alexander and Senator Bob Corker.

#### **National Coordinated Web Conference**

- Thur., Aug. 10, Nationwide (Virtual)
  - All U.S. Congressmen
  - Topics: Understanding Individual Taxpayer Identification Numbers (ITINs) and the ITIN Renewal Process

#### **Weekly Outcome Updates from Events and Activities by Area Required**

<b>Area</b>	<b>Outcome</b>
<b>Central/Mid-South:</b>	During our IMRS Web conference, a practitioner expressed concern that it is difficult for foreign nationals to get an ITIN for their dependent. They are resistant to turning over passports and original copies of birth certificates required to be provided in applying for an ITIN. The practitioner was informed of the option of either going to a CAA or making an appointment at a TAC. Additionally, we used this as an opportunity to inform the practitioners in attendance of the upcoming ITIN webinar on 8/10/17.
<b>Great Lakes/Mid-West:</b>	SL Received email from stakeholder that the IRS Form 2290 Webisode invite was shared with 86 clients that are in transportation or warehousing type of business. They are in Michigan, Ohio and Indiana.
<b>Mid-Atlantic:</b>	On 7/21 the Mid-Atlantic Area used WebEx to hold its first Multi-State Small Business Forum (SBF). Due to generally low attendance at individual state SBFs a decision was made to hold a single virtual event for all 8 Mid-Atlantic states. Fourteen people representing 11 organizations in 4 states attended the event.
<b>New York:</b>	As a result of participation in a panel event with Spanish American Chaplin Association, SSL has a follow-up meeting with local clergy community leaders. They are interested in discussing ways tax information can be included in their community outreach – identified a real need especially with topics like ITIN.
<b>Northwest:</b>	Oregon Small Business Forum: There was a lot of interest in data security and the Don't Take the Bait Campaign. At least one of the Small Business Development Centers has pledged to post this information to their website.
<b>South Atlantic:</b>	SL presented key messages at the 2017 Latina Style Business Series sponsored by Latina Style Magazine

	<p>which will leverage the information via a distribution of 150,000, a readership of 600,000, and an average of 200,000 hits a month on their website. Event also yielded a contact with the National Association of Women Business Owners who solicited SLF participation at an event they are having in the fall, potentially reaching more than 42,000 women in business as well as those in the Latino community.</p>
<b>Southeast/Southwest:</b>	<p>Houston Regional Practitioner meeting - Several question during the panel meeting were in reference to “Private Debt Collection” and the fact that it didn’t work before, why are they taking jobs away from RO’s</p> <ul style="list-style-type: none"> <li>- What are you doing about hiring and the fact that your employees are doing more work with less.</li> <li>- Both TIGTA and CI discussion was actually tied into our presentation on “Protect your Clients Protect Yourself” message. They basically reiterated what was said during SL’s presentation and shared other scams. <a href="#">Article ran in the Houston Chronicle addressed CI’s efforts.</a></li> </ul>
<b>Western:</b>	<p>Western held its Fresno PLM this week. Practitioners were concerned that there was no formal guidance from the IRS regarding how they advise their clients when completing the ACA questions on the tax return. They were concerned that they may face penalties or ethics sanctions if they improperly advised their clients on how to answer the questions. They ask for better guidance as we prepare for the next filing season.</p>



## **Communications and Liaison – Weekly Activity Report Week of August 7, 2017**

### **Internal Communications**

#### Commissioner News

- Commissioner Koskinen visits Austin employees 8/1-2 (C&L)

#### IRS Headlines

- ELMS training now available to help you manage records with Outlook 2016 (PGLD)
- Easily track your payroll, personnel or leave OS GetServices tickets (HCO)
- ConcurGov's redesigned General tab will be available August 15 (CFO)

#### Leaders' Alert

- Funding for award ceremonies is limited to registration fees and local travel (HCO)

#### Poll Question

- What is the Hispanic population of the United States projected to be by 2040? (EDI)
- What is your favorite thing about working for the IRS? (C&L)

#### Spotlight

- Careers of service (Multiple)
- It's as easy as riding a bike (W&I)

#### Webbie

- New Web Apps Collaboration Center allows IRS to better develop online tools for taxpayers (IT)
- Keep an eye on your pay, deductions and leave (AWSS)

### **Media Relations**

#### Potential news releases for this week:

- Security Summit: Don't take the bait campaign
- Expiring ITIN notices
- Highway use tax – reminder for truckers
- IRS Notices in the mail to some taxpayers

#### Potential releases for coming weeks:

- Security Summit: Don't take the bait campaign continues
- Additional LITC grant recipients announced
- Understanding the estimated tax penalty
- Injured/innocent spouse requests
- Amending tax returns
- Scams warning – top three scams

### **National Public Liaison**

August 8 - Commissioner Koskinen will speak at the National Association of Tax Professionals (NATP) 36th Annual National Conference.

August 9 – The Latino Tax Professional Association is hosting their 2017 National Convention in Las Vegas, Nevada. National Taxpayer Advocate Nina Olsen, Return

Preparer Director Carol Campbell, ITIN Chief Sharon Bradley will be speaking at the event.

August 9 – W&I Deputy Commissioner David Alito is scheduled to speak at the Reporting Agent Forum at the New Carrollton Federal Building in Lanham, Maryland.

### **Legislative Affairs**

NOT IRS AGENCY RECORDS



#### **UPCOMING HEARINGS:**

Currently, there are no hearings scheduled.

#### **NEW DISTRICT CONGRESSIONAL LIAISON BRANCH MEETINGS:**

NOT IRS AGENCY RECORDS



#### **DISTRICT CONGRESSIONAL LIAISON BRANCH MEETINGS:**

NOT IRS AGENCY RECORDS



## **Social Media**

## **Visual Education and Communications**

### **Internal Programs**

#### **1. SABA Sessions (Captioning):**

PDB - Measuring Messages (08/08)  
Informational/Training

HCO - Effective Workplace Conversations (08/09)  
Informational/Training

HCO - The Basics of Creating a Project Plan (08/09)  
Informational/Training

HCO - Improving Creativity, Memory and Focus (08/09)  
Informational/Training

HCO - Benefits of the GRB Platform (08/10)

Informational/Training

SB/SE - Remote Management (08/10)

Informational/Training

IT - IT Connections Hour: Inclusive Diversity, Your Role in Creating an Inclusive Work Environment (08/10)

Informational/Training

SB/SE - Engaging Employees and Group Dynamics (08/11)

Informational/Training

2. Other Projects: *(i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)*

Avid Edit: YouTube Abbreviated Video Update (08/07)

Avid Edit: YouTube Video – Certain Taxpayers Can File Their Employment Taxes Annually  
(08/07-08/08)

Avid Edit: Criminal Investigation (CI) YouTube Videos (08/08-08/11)

YouTube Taping - IRS.Gov Refresh (08/09)

Avid Edit: TAS - Most Litigated Issues Video (08/10)

3. Servicewide Video Editorial Board (SVEB) – Internal:

Request VR#591 – AWSS Video - Annual All Hands OEP Briefing

Target Audience: Internal employees and contractors, six thousand employees and contractors located at the New Carrollton POD.

Informational/Educational Message

External Programs

1. Videos Uploaded to IRS YouTube Channels:

- English Videos:
  - Certain Taxpayers Can File Their Employment Taxes Annually (Pending Approval)

2. Servicewide Video Editorial Board (SVEB) – External:

Request VR#589 – TEGE Pre-Approved Plans Opinion Letter Program (Revenue Procedure 2017-41) Captivate Video

Target Audience: External. External audience (sponsors and representatives of Pre-Approved Pension Plans)

Informational/Educational Message

**Stakeholder Liaison Field**

In addition to the specific events listed below, additional SL work for the week of August 6, 2017 include:

- 9 Leveraged Small Business Workshops (LSBW)
- 7 Relationship Management Meetings
- 3 Local Payroll Events
- 2 Industry Events
- 2 Local Web Conferences
- 1 Small Business Regulatory Enforcement Fairness Act (SBREFA)

### Stakeholder Liaison

#### Practitioner Liaison Meeting (PLM's)

(Congressional members named FYI only. They do not attend)

- Tues., Aug. 8, 2017 Montana & Wyoming (Virtual) KH
  - All Montana and Wyoming Congressmen
  - Topics: Correspondence Exams; Practitioner Data Breaches
- Thurs., Aug. 10, 2017 Fargo, ND (F2F) KW
  - Congressman Kevin Cramer
  - Topics: Correspondence Exams; Private Debt Collection; Practitioner Data Breaches
  - Speakers include a practitioner victim of a data breach

#### Practitioner Seminar/Working Together

- Thur., Aug. 17, St. Charles, MO (F2F) MM for CEC
  - Congressman Blaine Luetkemeyer and Lacy Clay, Jr.
  - Topics: Annual Filing Season Program; Appeals Judicial Approach and Culture (AJAC), CAF - Third Party Authorizations, Direct Pay, Early Interaction Initiative - FTD Alerts, Employment Tax Issues, Excise Tax - Form 2290, Exempt Organization, Foreign Account Tax Compliance Act (FATCA), Future State, Identity Theft and Phishing, Information Reporting and Document Matching (IRDM), New Secure Access Process for Get Transcript, Online Payment Agreements, Reporting abusive tax promotions and/or promoters - Lead Development Center, Retirement Plans Made Easy.

#### Other Practitioner Meetings

(Congressional members named FYI only. They do not attend).

- Mon., Aug. 7, Pasadena, CA (F2F) JHB for DG
  - Event Title: CalCPA Pasadena/West San Gabriel Valley Discussion Group Weekly Meeting
  - Congresswoman Judy Chu
  - Topics: Identity Theft and Phishing; New Secure Access Process for Get Transcript; Payment Options; Practitioner Data Breaches
- Tues., Aug. 8, Las Vegas, NV (F2F) JHB for DG
  - Event Title: 2017 Latino Tax Professionals Association National Convention
  - Congresswoman Dina Titus
  - Topics: Identity Theft and Phishing; Payment Options; Practitioner Data Breaches; Tax Security Awareness
- Tues., Aug. 8, Farmington, NM (F2F) GT

- Event Title: Farmington Regional Practitioner Meeting
  - Congresswoman Michelle Lujan Grisham, Congressmen Stevan Pearce and Ben Lujan
  - Topics: Correspondence Exams, CAF - Third Party Authorizations, Early Interaction Initiative - FTD Alerts, EITC Due Diligence, Identity Theft and Phishing, Practitioner Data Breaches
- Wed., Aug. 9, Daytona, FL (F2F) GT
  - Event Title: IRS Updates
  - Congressman Ron DeSantis
  - Topics: Don't Take the Bait (National Tax Security Summer Summit); Online Account Information for Balance Due, Tax Scheme Awareness; Taxpayer Digital Communications (TDC), Identity Theft and Phishing
- Thurs., Aug. 10, Huntsville, TX (F2F) GT
  - Event Title: Huntsville Regional Practitioner Meeting
  - Congressman Kevin Brady, John Colberson, Ted Poe, Gene Green, Al Green and Congresswoman Shelia Jackson Lee
  - Topics: CAF - Third Party Authorizations, Practitioner Data Breaches, Refundable Credits, Due Diligence
- Thurs., Aug. 10, Stockton, CA (F2F) JHB for DG
  - Event Title: CSEA Big Valley FBAR and Data Breach Presentation
  - Congressman Jerry McNeary
  - Topics: Don't Take the Bait (National Tax Security Summer Summit); Foreign Bank and Financial Accounts (FBAR), Identity Theft and Phishing; Practitioner Data Breaches
- Tues., Aug. 15, Birmingham, AL (F2F) MM for CEC
  - Event Title: Practitioner -Alabama Association of Accountants - Birmingham Chapter Meeting
  - Congressman Terri Sewell
  - Topics: IRS Updates on Identity Theft and Phishing and EITC Due Diligence
- Tues., Aug. 15, Valdosta, GA (F2F) GT
  - Event Title: GSCPA Valdosta Chapter Meeting
  - Congressman Austin Scott and Barry Loudermilk
  - Topics: Automated Underreporter Program (AUR), Changes to OIC Policy; Correspondence Exams, Field Audit Process; Payment Options and Other Online Tools, Practitioners Filing Accurate EITC and Refundable Credits Returns, Private Debt Collection
- Wed., Aug. 16, Palm City, FL (F2F) GT
  - Event Title: FICPA Palm City Chapter Meeting
  - Congressman Brian Mast, Theodore Deutch and Congresswoman Lois Frankel
  - Topics: Identity Theft and Phishing
- Wed., Aug. 16, Richmond, VA (Virtual) DY
  - Event Title: Offer in Compromise and Collection Updates
  - Congressman Donald McEachin
  - Topics: Changes to OIC Policy; Private Debt Collection

- Wed., Aug. 16, Wilkes Barre, PA (F2F) MR
  - Event Title: PSTAP Northeast Chapter Meeting
  - Congressman Matthew Cartwright and Lou Barletta
  - Topics: Don't Take the Bait (National Tax Security Summer Summit), Form 2290, Heavy Highway Vehicle Use Tax, Online Account Information for Balance Due, Private Debt Collection, Tax Scheme Awareness, Taxpayer Digital Communications (TDC), Correspondence Exams, Form 8300 - Report of Cash Payments over \$10000 Received in a Trade or Business, Identity Theft and Phishing, Payment Options, Practitioner Data Breaches
- Thurs., Aug. 17, Nashville, TN (F2F) MM for CEC
  - Event Title: AFWA Music City Chapter
  - Congressman Jim Cooper
  - Topics: Don't Take the Bait (National Tax Security Summer Summit), Form 2290, Heavy Highway Vehicle Use Tax, Online Account Information for Balance Due, Passport Revocation or Denial, Private Debt Collection, Tax Scheme Awareness, Taxpayer Digital Communications (TDC)

#### Coordinated Web Conferences

- Thur., Aug. 10, Nationwide (Virtual) JHB for DG
  - All U.S. Congressmen
  - Topic: Understanding Individual Taxpayer Identification Numbers (ITINs) and the ITIN Renewal Process
- Thur., Aug. 15 & 16, Nationwide (Virtual) JHB for DG
  - All U.S. Congressmen
  - Topic: Reminders for Form 2290 - Heavy Vehicle Highway Use Tax Return
- Thur., Aug. 17, Nationwide (Virtual) JHB for DG
  - All U.S. Congressmen
  - Topic: Understanding S Corporations Part I - Overview and Election

# **Communications and Liaison – Weekly Activity Report**

## **Week of August 14, 2017**

### **Internal Communications**

#### Headlines

- Are you looking for no-cost training options? (HCO)

#### Leaders' Alert

- Make sure you follow the reasonable accommodation process (EDI)
- Find no-cost training options for yourself, your employees (HCO)
- Post SETR correctly when employees retire (HCO)

#### Poll Question

- How many mandatory briefings offer a test-out option? (HCO)

#### Spotlight

- Keep calm and cook on (National Chefs Appreciation Week) (Multiple)

#### Webbies

- HCO's Human Resources Enrichment Program mentors, develops HR employees (HCO)
- Attend a session about the benefits of the Schedule A hiring authority (EDI)
- Safe mail handling: recognize and avoid potential threats (AWSS)

### **Media Relations**

#### Potential news releases for this week:

- Security Summit: Don't take the bait campaign
- Understanding the estimated tax penalty

#### Potential releases for coming weeks:

- Security Summit: Don't take the bait campaign continues
- IRS Notices in the mail to some taxpayers
- Additional LITC grant recipients announced
- IRS offers one-stop resource center to new small businesses
- Injured/innocent spouse requests
- Amending tax returns
- Scams warning – top three scams

### **National Public Liaison**

IRPAC Working Session – August 15 & 16 @ 1111 – On August 15, IRPAC members will meet in sub-groups and work on developing recommendations for the final IRPAC report. The IRPAC Chair and Vice Chair will meet with Commissioner Koskinen to discuss issues for the Public Meeting in October. On August 16, all members will have a general session meeting. In addition to sub-group report outs, members will hear from Carol Campbell on PTINs, W&I on upcoming forms and publications and Counsel on W4P Withholding Certificate for Pension.

### **Legislative Affairs**

#### **UPCOMING MEETINGS:**

**NOT IRS AGENCY RECORDS**



NOT IRS AGENCY RECORDS



**UPCOMING HEARINGS:**

Currently, there are no hearings scheduled.

**NEW DISTRICT CONGRESSIONAL LIAISON BRANCH MEETINGS:**

NOT IRS AGENCY RECORDS



NOT IRS AGENCY RECORDS



**DISTRICT CONGRESSIONAL LIAISON BRANCH MEETINGS:**

NOT IRS AGENCY RECORDS



## **Social Media**

## **Visual Education and Communications**

### **Internal Programs**

#### **1. SABA Sessions (Captioning):**

HCO - Executive Readiness Preparation Platform (08/15)  
Informational/Training

LB&I - LB&I 7114 Ethics Briefings (08/15)  
Informational/Training

EDI - Diversity and Inclusion through Emotional Intelligence (08/15)  
Informational/Training

OLS - Content Management Request System (08/16)

Informational/Training

HCO - Geographic Leadership Communities (GLC) Summit (08/16)

Informational/Training

TEGE - FY17 TEGE CPE, EP Prohibited Transactions and 4975 (08/17)

Audience: IRS Employees

Informational/Training

2. Other Projects: *(i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)*

Avid Edit: Criminal Investigation (CI) YouTube Videos (08/17-08/18)

Avid Edit: TAS - Most Litigated Issues Video (08/15-08/18)

3. Servicewide Video Editorial Board (SVEB) – Internal:

Request VR#586 – IT – Tell Me More About “It” – The “It” of Information Technology Videos (7 videos)

Target Audience: Internal. This project is for an internal audience ONLY—specifically for Information Technology employees, but may have relevance to BSPs and others outside of IT, but within IRS 7,000 IRS IT employees; 5,000 IT contractors.

Informational Message

Request VR#590 – IT User Network Services Video Series: The Face of IT4U (total of 6 videos)

Target Audience: Internal. IRS employees, target Audience for one of the segments is UNS-only, rest are all IRS computer users.

Informational Message

#### External Programs

1. Videos Uploaded to IRS YouTube Channels:

- English Videos:
  - IRS.gov Website Refresh

#### Stakeholder Liaison Field

## **Communications and Liaison – Weekly Activity Report Week of August 21, 2017**

### **Internal Communications**

#### Headlines

- New leave fields added to your Statements of Earnings and Leave (HCO)

#### Leaders' Alert

- Know your responsibilities as a manager for seasonal employees entering non-pay status (HCO)
- You may be asked to provide information not available via the Work Number (HCO)
- Upload all denied, suspended or terminated telework agreements to the Telework Denial Library (HCO)
- Quality Step Increase procedures changed under the 2016 National Agreement (HCO)
- Updated Equal Employment is the Law poster now available. (EDI)

#### Poll Question

- There's a total solar eclipse across the U.S. August 21. What did you notice most? (C&L)
- Should SharePoint sites look different now that the migration to SharePoint 2013 has happened? (IT)

#### Spotlight

- Total eclipse of the sun (Multiple)

#### Webbie

- Tidiness and safety: partners in the office (AWSS)
- Need proof of income or employment? Use the Work Number. (HCO)
- Avoid bringing prohibited items to federal parking facilities (AWSS)
- Office 365 upgrade: Frequently asked questions (IT)

### **Media Relations**

#### Potential news releases for this week:

- Security Summit: Don't take the bait
- IRS offers one-stop resource center to new small businesses

#### Potential releases for coming weeks:

- Security Summit: Don't take the bait campaign continues
- Reminder for parents and students: Educational tax credits
- Amending tax returns
- Additional LITC grant recipients announced
- Understanding the estimated tax penalty
- Injured/innocent spouse requests
- Scams warning – top three scams

### **National Public Liaison**

Tuesday Aug. 22, 1:30 p.m. – SB/SE Commissioner Mary Beth Murphy delivers keynote address at Washington, D.C.-area IRS Nationwide Tax Forum. Gaylord Hotel, National Harbor, Md.

Tuesday Aug. 29, 1:30 p.m. – IRS Commissioner John Koskinen delivers keynote address at Las Vegas IRS Nationwide Tax Forum. Rio Hotel, Las Vegas.

## **Legislative Affairs**

### **UPCOMING MEETINGS:**

NOT IRS AGENCY RECORDS



### **UPCOMING HEARINGS:**

Currently, there are no hearings scheduled.

### **DISTRICT CONGRESSIONAL LIAISON BRANCH MEETINGS:**

NOT IRS AGENCY RECORDS





## **Social Media**

## **Visual Education and Communications**

### **Internal Programs**

#### Video to Desk-top – Live or Recorded Events:

SBSE Estate Tax Attorney and Paralegal CPE - Day 1 of 2 – Live Stream (08/23)

Topic: The primary objective is the presentation of technical estate and gift law updates or new developments to IRS attorneys for the satisfaction of state mandated CLE requirements.

Audience: Our audience is primarily attorneys with considerable knowledge of estate and gift tax law. We have a few (<25) paralegals and non-lawyers but these audience members also have significant experience in estate and gift law.

SBSE Estate Tax Attorney and Paralegal CPE - Day 2 of 2 – Live Stream (08/24)

Topic: The primary objective is the presentation of technical estate and gift law updates or new developments to IRS attorneys for the satisfaction of state mandated CLE requirements.

Audience: Our audience is primarily attorneys with considerable knowledge of estate and gift tax law. We have a few (<25) paralegals and non-lawyers but these audience members also have significant experience in estate and gift law.

- SABA Sessions (Captioning):

HCO - Leadership Behavior Session (08/22)  
Informational/Training



IT - AD PM Mentorship Launch (08/22)  
Informational/Training

EDI - Benefits of Using Schedule a Hiring Authority (08/22)  
Informational/Training

LBI - Competent Authority Revenue Procedures 2015-40 (08/23)  
Informational/Training

TEGE - FSLG FY 2017 CPE - Non-Resident Alien Employee Income Tax  
Withholding (08/24)  
Informational/Training

EDI - Harassment Overview (08/24)  
Informational/Training

- Other Projects: (*i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.*)

Final Cut Pro Edit: AWSS Annual OEP Briefing (08/22-08/24)

Avid Edit: Criminal Investigation (CI) YouTube Videos  
(08/22-08/25)

ASL Tax Tips 64 Taping (08/23)

Avid Edit: ASL Tax Tips 64 (08/24-08/25)

- Servicewide Video Editorial Board (SVEB) – Internal:

Request VR#588 – IT State of Information Technology Video  
Target Audience: Internal. This project is for an internal audience ONLY—specifically for 7,000 Information Technology employees and possibly 5,000 IT contractors.  
Informational Message

### External Programs

#### 2. Servicewide Video Editorial Board (SVEB) – External:

Request #594 – SBSE - Affordable Care Act: IRC § 4980H Employer Shared  
Responsibility Payment Compliance and Notice Process  
Target Audience: External, approximately 3,000 - 5,000 tax practitioners

- Informational Message

### Stakeholder Liaison Field

- Tues., Aug. 22, 2017 Edison, NJ (F2F)
  - Internal Group Meeting
  - Topic: Don't take the bait, Practitioner Data Breach
  - Stakeholder: LB&I International Group Team
  - Est. Attendees: 10
- Tues., Aug. 22, 2017 Los Angeles, CA (F2F) **JHB for DG**

- LA Law Library Business Series
  - Topic: New Entrepreneurs Initiative; Form 2290 - Heavy Vehicle Use Tax; ITIN Renewal Process; Tax Scheme Awareness
  - Stakeholder: Los Angeles County Dept. of Consumer & Business Affairs
  - Est. Attendees: 40
- **Tues., Aug. 22, 2017 Birmingham, AL (V & F2F) CEC**
  - Internal Meeting (SPEC)
  - Topic: Don't Take the Bait (National Tax Security Summer Summit); Form 2290, Heavy Highway Vehicle Use Tax; Online Account Information for Balance Due; Private Debt Collection; Tax Scheme Awareness; ITIN Outreach - Path Act
  - Stakeholder: Birmingham Aea SPEC
  - Est. Attendees: 15
- **Tues., Aug. 22, 2017 Akron, OH (V) KW**
  - Local Web Conference
  - Topic: Identity Theft and Phishing; New Entrepreneurs Initiative
  - Stakeholder: SCORE
  - Est. Attendees: 50 SCORE Counselors
- **Tues., Aug. 22, 2017 Little Rock, AR (F2F) CEC**
  - Arkansas Society of EA Conference
  - Topic: Private Debt Collection; Tax Scheme Awareness; Automated Underreporter Program (AUR); Changes to OIC Policy; Correspondence Exams; Field Audit Process; Practitioner Data Breaches, Don't Take the Bait (National Tax Security Summer Summit)
  - Stakeholder: Arkansas Society of Enrolled Agents
  - Est. Attendees: 30
- **Tues., Aug. 22, 2017 Amarillo, TX (F2F) GT**
  - Event: Amarillo Regional Practitioner Meeting
  - Topic: CAF - Third Party Authorizations; Collection User Fees; Direct Pay; EITC Due Diligence; Identity Theft and Phishing; Online Payment Agreements; Practitioner Data Breaches; Refundable Credits PATH Due Diligence.
  - Stakeholder: West Texas Practitioners
  - Est. Attendees: 65
- **Tues., Aug. 23, 2017 Amarillo, TX (F2F) GT**
  - Event: 2017 Panhandle Tax Institute
  - Topic: Identity Theft and Phishing; Practitioner Data Breaches
  - Stakeholder: Texas Society of Certified Public Accountants
  - Est. Attendees: 250
- **Wed., Aug. 23, 2017 Manteca, CA (F2F) JHB for DG**
  - Event: CalCPA San Joaquin Meeting
  - Topic: Don't Take the Bait (National Tax Security Summer Summit); Foreign Bank and Financial Accounts (FBAR); Practitioner Data Breaches
  - Stakeholder: CalCPA Chapter San Joaquin
  - Est. Attendees: 30
- **Wed., Aug. 23, 2017 Ogden, UT (F2F) KH**
  - Event: Congressional Aid tour of Service Center
  - Stakeholder: Congressman Rob Bishop's Office

- Est. Attendees: 1
- Thurs., Aug. 24, 2017 Sacramento, CA (F2F) **JHB for DG**
  - Event: Immigrant Resource Forum
  - Topic: ITIN Outreach - Path Act
  - Stakeholder: Partnership with U.S. Immigration Office
  - Est. Attendees: 75
- Thurs., Aug. 24, 2017 Fresno, CA (V) **JHB for DG**
  - Event: Western Area IMRS Call
  - Topic: IMRS
  - Stakeholder: CSEA Mission Society Chapter
  - Est. Attendees: 15
- Thurs., Aug. 24, 2017 Cincinnati, OH (F2F) **KW**
  - Event: 2017 IRS Tax Symposium and TAS Problem Resolution Day
  - Topic: Private Debt Collection; Collection User Fees; Identity Theft and Phishing; Online Payment Agreements; Practitioner Data Breaches, ITIN Renewal, W-2 Verification Code; Passport Revocation/Denial
  - Stakeholder: Education Dept. of Scarlet Oaks High School
  - Est. Attendees: 125
- Thurs., Aug. 24, 2017 Overland Park, KS (F2F) **CEC**
  - Event: Kansas IRS Symposium
  - Topic: Don't Take the Bait (National Tax Security Summer Summit); Online Account Information for Balance Due; Taxpayer Digital Communications (TDC)
  - Stakeholder: Kansas Chapter of National Association of Tax Professionals
  - Est. Attendees: 150

# **Communications and Liaison – Weekly Activity Report**

## **Week of August 28, 2017**

### **Internal Communications**

#### IRS Headlines

- Reminder: Quality Step Increase procedures changed under the 2016 National Agreement (HCO)
- Know these five important telework responsibilities (HCO)
- Order your 2018 tax products in accessible formats by September 15 (W&I)
- This October, some IRS mailrooms will start opening 30 minutes later (AWSS)

#### Leaders' Alert

- New IRS Learning Portal, a one-stop centralized site for Servicewide training and development (HCO)
- Need to make changes to or check status of a personnel action request? (HCO)
- Encourage your staff to complete SharePoint 2013 training (IT)
- Office of Taxpayer Correspondence: Your first stop when you need a taxpayer notice or letter (W&I)
- Fiscal year 2018 procurement acquisition due dates are here (Procurement)
- Attend 12450 ePerformance training for new managers and proxies (HCO)

#### Poll Question

- You can connect your personally owned mobile devices to the following: (IT)
- September 2 celebrates the establishment of the U.S. Treasury Department. How many years has the U.S. Treasury been in existence? (RAAS)

#### Spotlight

- Hacks for your headache (IT)

#### Webbie

- Be prepared: Don't get locked out over the holiday (IT)

### **Media Relations**

#### Potential news releases for this week:

- Security Summit: Don't take the bait
- Reminder for parents and students: Educational tax credits
- Educational tax deductions and IRS.gov resources
- Tax benefits for educators

#### Potential releases for coming weeks:

- Security Summit: Don't take the bait campaign continues
- Amending tax returns
- Additional LTC grant recipients announced
- Understanding the estimated tax penalty
- IRS offers one-stop resource center to new small businesses
- Injured/innocent spouse requests
- Scams warning – top three scams
- IRS Notices in the mail to some taxpayers

### **National Public Liaison**

Monday, Aug. 28 – U.S. Small Business Administration Office of the National Ombudsman National Regulatory Fairness Hearing in Washington, DC.

Tuesday, Aug. 29 - SBA ONO Annual Meeting of the Regional Small Business Regulatory Fairness Boards in Washington, DC.

Tuesday, Aug. 29, 1:30 p.m. PT (4:30 p.m. ET) – Commissioner Koskinen delivers keynote speech at IRS Nationwide Tax Forum. Rio Hotel, Las Vegas.

Wednesday, Sept. 6, 2:30 p.m. ET – Commissioner Koskinen meets with Chair and Vice Chair of Internal Revenue Service Advisory Council (IRSAC). Room 3000.

Thursday, Sept. 7, 9:30 a.m. ET – Commissioner Koskinen meets with members of the Electronic Tax Administration Advisory Committee (ETAAC). IRS Headquarters.

### **Legislative Affairs**

NOT IRS AGENCY RECORDS



### **UPCOMING HEARINGS:**

Currently, there are no hearings scheduled.

### **NEW DISTRICT CONGRESSIONAL LIAISON BRANCH MEETINGS:**

NOT IRS AGENCY RECORDS



NOT IRS AGENCY RECORDS



**CANCELLED DISTRICT CONGRESSIONAL LIAISON BRANCH MEETINGS:**

NOT IRS AGENCY RECORDS



NOT IRS AGENCY RECORDS

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**UPCOMING DISTRICT CONGRESSIONAL LIAISON BRANCH MEETINGS:**

NOT IRS AGENCY RECORDS

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**Social Media**

## **Visual Education and Communications**

### **Internal Programs**

#### **1. Video to Desk-top – Live or Recorded Events:**

Chief Counsel: LB&I Virtual Town Hall Meeting @1111 – Live Poly/Stream (08/29)

Description: The LB&I Town Hall Meeting will provide LB&I attorneys with information and updates regarding relevant administrative, substantive and technical issues. Including, but not limited to the state of the Office, employee engagement, policy issues, and work product concerns.

Audience: The audience will be approximately 350 Chief Counsel attorneys in 50 locations. We anticipate 300 individual streams.

Broadcast date and time: August 29, 2017 from 1:00pm -3:00pm EST @1111 Auditorium.

#### **2. SABA Sessions (Captioning):**

LBi - Cross Border Activities Global Awareness Training - International Tax Overview Session 1 (08/28)  
Informational/Training

LBi - Cross Border Activities Global Awareness Training - International Tax Overview Session 2 (08/28)  
Informational/Training

APPEALS - APS CPE: NMF Assessment/Abatement (08/29)  
Informational/Training

LBi - Section 385 Final and Temporary Regulations Part 1 (08/29)  
Informational/Training

LBi - Section 385 Final and Temporary Regulations Part 2 (08/29)  
Informational/Training

LBi - Form 8938 Audit Techniques CPE (08/30)  
Informational/Training

LBi - Interest Capitalization under IRC 263A for Self Constructed Assets Part 1 (08/30)  
Informational/Training

LBi - Pass through Entities - Revenue Agents Intro to Electronic Data (08/30)  
Informational/Training

LBi - Interest Capitalization Under IRC 263A for Self Constructed Assets Part 2 (08/30)  
Informational/Training

HCO - Division Leaders Chat: Worklife Benefits & Performance (08/31)  
Informational/Training

HCO/IT - IT All Employee Town Meeting (08/31)



## Informational/Training

### 3. Other Projects: *(i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)*

Avid Edit: New Carrollton Security Briefing (08/28-08/29)

ASL Tax Tips 64 - Audio Recording (08/29)

Media Training for C&L @1111 (08/28)

Avid Edit: Criminal Investigation (CI) YouTube Videos (08/29-09/01)

Avid Edit: ASL Tax Tips 64 (08/28-08/31)

### 4. Servicewide Video Editorial Board (SVEB) – Internal:

Request VR#595 - IT DevOps to Show YouTube Video via Live Meeting to 25-30 IT Employees on 9/6/17

Target Audience: Internal, IRS IT employees

Informational message

## External Programs

### 1. Videos Uploaded to IRS YouTube Channels:

- English Videos:
  - New IRS Website

## **Stakeholder Liaison Field**

- Wed., Aug. 30, 2017 Florence, SC (V) **DY**
  - Virtual Industry Meeting
  - Topic: Disaster Planning & Record Keeping
  - Stakeholder: Kelley Center for Enterprise and Innovation
  - Est. Attendees: 15
- Wed., Aug. 30, 2017 New Orleans, LA (F2F) **CEC**
  - The Mayor's Office of Economic Development 2017 3rd Quarter Business Info Session
  - Topic: Form 2290 Heavy Hwy Vehicle Use Tax, ITIN PATH ACT, Tax Schemes, Don't Take The Bait, Independent Contractor vs. Employee, New Entrepreneur Initiative
  - Stakeholder: Mayor's Office of Economic Development and the LA Department of Revenue
  - Est. Attendees: 30
- Wed., Aug. 30, 2017 Tarzana, CA (F2F) **JHB for DG**
  - CALCPA Discussion Group Meeting
  - Topic: Don't Take the Bait, Form 2290 Heavy Hwy Vehicle Use Tax, ITIN Renewal Process, Online Account Information for Balance Dues; Private Debt Collection
  - Stakeholder: CALCPA Discussion Group
  - Est. Attendees: 40

- Thurs., Aug. 31, 2017 Edinberg, TX (V and F2F) **VM for GT**
  - Event: Edinberg Regional Practitioner Meeting
  - Topic: CAF - Third Party Authorizations; Collection User Fees; Direct Pay; EITC Due Diligence; Identity Theft and Phishing; Online Payment Agreements; Practitioner Data Breaches; Refundable Credits PATH Due Diligence.
  - Stakeholder: Edinberg Area Practitioners
  - Est. Attendees: 100
  
- Fri., Sept. 1, 2017 Dallas, TX (V) **VM for GT**
  - First Friday IMRS Call
  - Topic: IMRS Issues
  - Stakeholders: Texas Association of Financial and Tax Specialist (TAFTS), Texas Society of Certified Public Accountants (TSCPA) , Texas Society of Enrolled Agents (TxSEA)
  - Est. Attendees: 20
  
- Fri., Sept. 1, 2017 Nationwide (V) **JHB for DG**
  - Event: Disaster Preparedness Month Webisode
  - Topic: Planning for Disaster – Making Sure You're Ready
  - Stakeholder: Nationwide Practitioners and Industry
  - Est. Attendees: 120 total for two sessions

# **Communications and Liaison – Weekly Activity Report**

## **Week of September 4, 2017**

### **Internal Communications**

#### Commissioner News

- Commissioner Koskinen visits Fresno employees 8/30 (C&L)

#### IRS Headlines

- It's now easier than ever to return unneeded computers and other IT equipment (IT)
- Strategic Plan priorities survey: Thanks for showing us where to focus our efforts (CFO)
- New IRS Learning Portal is a centralized site for Servicewide training and development (HCO)
- The look and feel of SharePoint is about to change; training can help (IT)
- The Public Student Loan Forgiveness program helps employees in public service jobs (HCO)

#### Key Agency Project

- A partnership to combat identity theft (Identity Theft Tax Refund Fraud Information Sharing and Analysis) (Multiple)

#### Leaders' Alert

- Discuss the Servicewide Details Opportunities list with your employees (HCO)
- Reminder: Complete Risk Management refresher training by 9/30 (CRO)
- Encourage employees, contractors to self-certify their assigned locations (AWSS)
- Help the IRS keep employees with disabilities, temporary limitations safe (AWSS)
- You must use annual rating ending date for certain departure ratings (HCO)

#### Spotlight

- Crazy about canning (IT)

#### Webbie

- Be ready - September is National Preparedness Month (AWSS)
- Complete your mandatory briefings in ELMS (HCO)
- Vote now for 2017 FedScoop 50 Awards (HCO)
- EDI presents Blind and Deaf awareness webinar (EDI)
- EDI presents Equal Employment Opportunity overview (EDI)

### **Media Relations**

#### Potential news releases for this week:

- Hurricane Harvey relief: leave sharing/donations
- Security Summit: Don't take the bait
- National Preparedness Month
- Amending tax returns

#### Potential releases for coming weeks:

- Security Summit: Don't take the bait campaign ends
- Reminder for parents and students: Educational tax credits

- Educational tax deductions and IRS.gov resources
- Tax benefits for educators
- Additional LITC grant recipients announced
- Understanding the estimated tax penalty
- IRS offers one-stop resource center to new small businesses
- Injured/innocent spouse requests
- Scams warning – top three scams
- IRS Notices in the mail to some taxpayers

### **National Public Liaison**

Wednesday, Sept. 6, 2:30 p.m. ET – Commissioner Koskinen meets with Chair and Vice Chair of Internal Revenue Service Advisory Council (IRSAC). Room 3000.

Thursday, Sept. 7, 9:30 a.m. ET – Commissioner Koskinen meets with members of the Electronic Tax Administration Advisory Committee (ETAAC). IRS Headquarters.

Tuesday, Sept. 12, 1:30 p.m. PT – SBSE Commissioner Mary Beth Murphy delivers keynote address at San Diego IRS Nationwide Tax Forum. Town and Country Hotel, San Diego.

### **Legislative Affairs**

NOT IRS AGENCY RECORDS



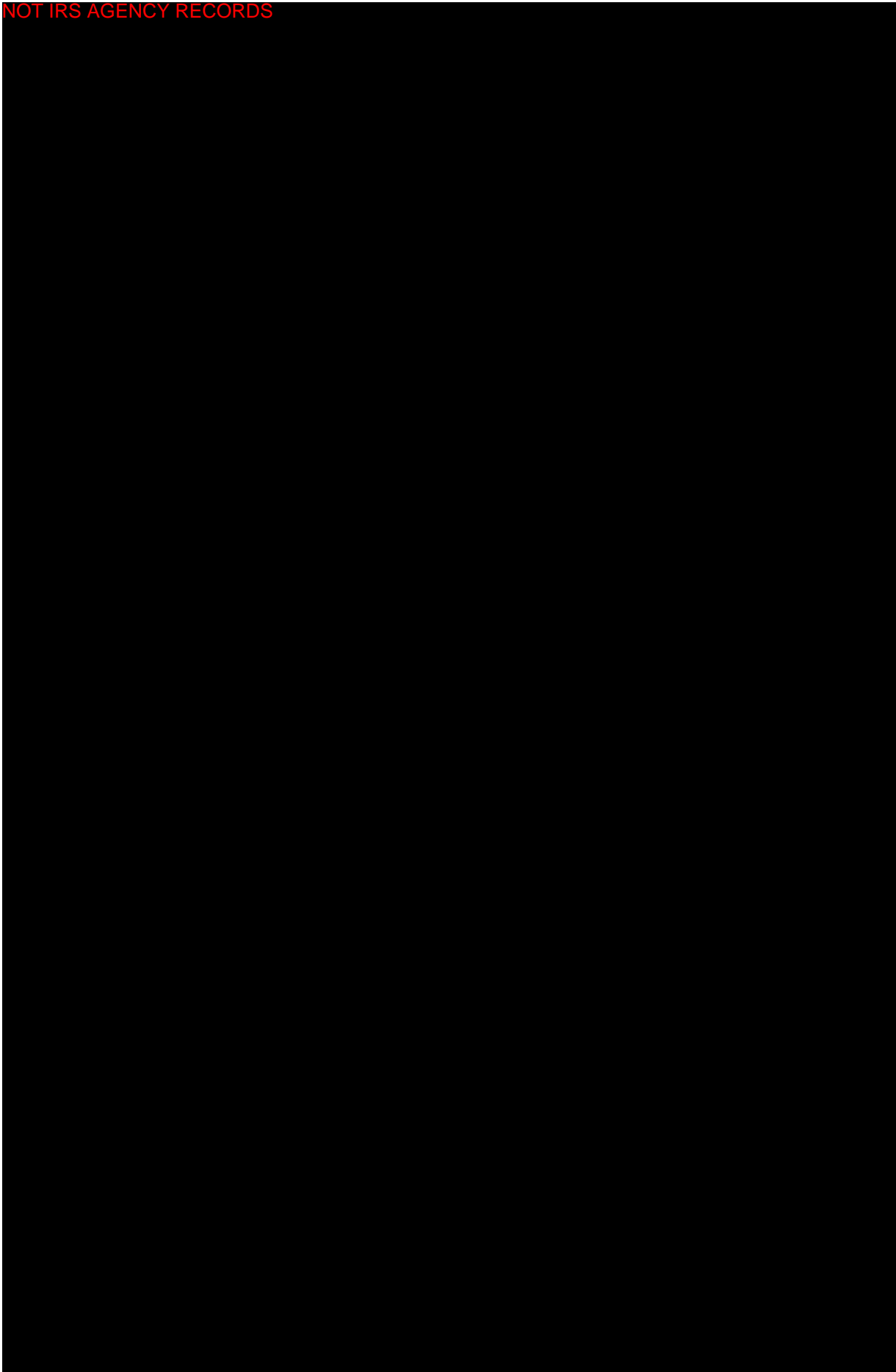
#### **UPCOMING HEARINGS:**

Currently, there are no hearings scheduled.

#### **UPCOMING DISTRICT CONGRESSIONAL LIAISON BRANCH MEETINGS:**

NOT IRS AGENCY RECORDS





## Social Media

### Visual Education and Communications

#### Internal Programs

1. SABA Sessions (Captioning):

HCO - Ethics 7114 - 1 (09/05)  
Informational/Training

EDI - Why Diversity and Inclusion Matters in the 21st Century (09/05)  
Informational/Training

HCO - Ethics 7114 - 2 (09/05)  
Informational/Training

LB&I - FBAR Audit Techniques Part 1 (09/06)  
Informational/Training

LB&I - FBAR Audit Techniques Part 2 (09/06)  
Informational/Training

HCO - Ethics 7114-3 (09/06)  
Informational/Training

HCO - Ethics 7114-4 (09/06)  
Informational/Training

EDI - EEO Overview (09/07)  
Informational/Training

LB&I - NO TRANSCRIPT - Determining Tax Residency (09/07)  
Informational/Training

TEGE - FY17 TEGE CPE - EP Update-Topics of Interest (09/07)  
Informational/Training

EDI - Deaf Awareness (09/07)  
Informational/Training

2. Other Projects: *(i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)*

Avid Edit: New Carrollton Security Briefing (09/05-09/06)

Avid Edit: New IRS Website Design (09/05)

Avid Edit: ASL Tax Tips 64 (09/05)

## ASL Tax Tips 65 Taping (09/06)

Taping: ASL SPEC Video: Tax Terminology (09/06)

Description: An American Sign Language interpreter would give an introduction about the video and proceed to signing the tax terms. The on-screen talent would require a deaf taxpayer and a deaf ASL interpreter who is fluent in tax terminology. Where appropriate, graphic imagery and green screen visuals would be used throughout the production to emphasize key points and help to illustrate the tax terminology.

Audience: Taxpayers, volunteer and paid tax professionals

ASL SPEC Video: Tax Terminology Voice Over – Audio Recording (09/07)

Avid Edit: ASL Spec Video: Tax Terminology (09/07-09/08)

### External Programs

#### 1. Videos Uploaded to IRS YouTube Channels:

- ASL Videos:
  - Private Collection of Overdue Taxes
  - Individual Taxpayer Identification Number
  - IRS Small Business Self-Employed Tax Center
- English Videos:
  - New IRS Website Design
  - What To Do After a Tax Professional Data Compromise (Pending Approval)

#### 2. Servicewide Video Editorial Board (SVEB) – External:

YouTube Request VR#148 – PATH 201 A

Target Audience: External. Taxpayers nationwide  
Informational message

Request VR#596 – TEGE 10 Minutes to Backup Withholding Captivate Presentation

Target Audience: External, government entities  
Informational message

Request VR#597 – TEGE How to Correct W-2's and Form 1099s After an Exam  
Captivate Presentation

Target Audience: External, government entities  
Informational message

Request VR#598 – TEGE Self-Assessment Tools for Public Employers, Forms 14581 Captivate Presentation

Target Audience: External government entities  
Informational message

### Stakeholder Liaison Field

- Tues., Sept. 5, 2017 Springfield, IL (V) **CEC**
  - Local Web Conference: Top Small Business Tax Tips and Recordkeeping

- Topic: Don't Take the Bait (National Tax Security Summer Summit); Form 2290, Heavy Highway Vehicle Use Tax; Tax Scheme Awareness; Taxpayer Digital Communications (TDC); Small Business Recordkeeping
  - Stakeholder: Peoria Area Chamber of Commerce
  - Est. Attendees: 25
- Tues., Sept. 5, 2017 Fredericksburg, VA (F2F) **DY**
  - Practitioner Chapter Meeting
  - Topic: Don't Take the Bait (National Tax Security Summer Summit); Tax Scheme Awareness; Dirty Dozen; Identity Theft and Phishing; New Secure Access Process for Get Transcript; Practitioner Data Breaches
  - Stakeholder: Virginia Society of CPA - Battlefield Chapter
  - Est. Attendees: 80
- Wed., Sept. 6, 2017 Fresno, CA (F2F) **JHB for DG**
  - Resource Forum for Immigrant Serving Organizations
  - Topic: Private Debt Collection; Identity Theft and Phishing; ITIN Outreach - Path Act; Payment Options; Small Business Recordkeeping
  - Stakeholder: US Department of Homeland Security - US Citizenship and Immigration Services
  - Est. Attendees: 80
- Wed., Sept. 6, 2017 Southgate, CA (F2F) **JHB for DG**
  - Southgate Chamber of Commerce 2017 Seminars
  - Topic: Payment Options and other Online Tools; Taxpayer Digital Communications
  - Stakeholder: Southgate Chamber of Commerce
  - Est. Attendees: 25
- Thurs., Sept. 7, 2017 Orlando, FL (F2F) **GT**
  - American Payroll Association National Payroll Week Seminar
  - Topic: Identity Theft and Phishing; Tax Professional Data Theft and Protection; Future State
  - Stakeholder: American Payroll Association – Orlando Chapter
  - Est. Attendees: 50
- Thurs., Sept. 7, 2017 Oakland, CA (F2F) **JHB for DG**
  - Taxpayer Advocate Service Congressional Workshop
  - Topic: Future State
  - Stakeholder: Governmental Liaison
  - Est. Attendees: 55
- Thurs., Sept. 7, 2017 Las Vegas, NV (F2F) **JHB for DG**
  - Committed to Our Business Community 2017
  - Topic: Online Payment Agreement; ID Theft; Payment Options; Private Debt Collections; Collection User Fees
  - Stakeholder: Business Development Advisory Council
  - Est. Attendees: 400
- Thurs., Sept. 7, 2017 Charleston, West Virginia (V) **MR**
  - Entrepreneur Online Chat
  - Topic: Employment Tax Issues; Independent Contractor or Employee; Information Reporting and Document Matching (IRDM); New Entrepreneurs Initiative
  - Stakeholder: Small Business Administration



- Est. Attendees: 40
- Thurs., Sept. 7, 2017 Bloomington, MN (V) **DB for KW**
  - First Thursdays IMRS Call
  - Topic: IMRS Issues
  - Stakeholders: Bloomington Area Practitioner Organizations
  - Est. Attendees: 20
- Thurs., Sept. 7, 2017 Laguna Niguel, CA (F2F) **JHB for DG**
  - Laguna Niguel Practitioner Liaison Meeting
  - Topic: Collection User Fees; Early Interaction Initiative - FTD Alerts; Online Payment Agreements; Practitioner Data Breaches; Don't Take the Bait (National Tax Security Summer Summit); Refundable Credits Due Diligence
  - Stakeholders: Laguna Niguel Area Practitioner Organizations
  - Est. Attendees: 30
- Thur., Sept. 7, 2017 Nationwide (V) **JHB for DG**
  - Nationwide Webinar
  - Topic: Understanding S Corporations Part II – Shareholder Basis & Stock Basis
  - Est. Attendees: 5,000 for two sessions
- Thurs., Sept. 8, 2017 Laurel, MD (F2F) **DY**
  - Overview of the IRS
  - Topic: Overview of the IRS. Darren Guillot, Director of Collection Field will be one of the speakers – No SL Attendance
  - Stakeholder: Capital Technology University
  - Est. Attendees: 50
- Fri., Sept. 8, 2017 Dallas, TX (V) (Rescheduled from 9/1/2017) **GT**
  - First Friday IMRS Call
  - Topic: IMRS Issues
  - Stakeholders: Texas Association of Financial and Tax Specialist (TAFTS), Texas Society of Certified Public Accountants (TSCPA) , Texas Society of Enrolled Agents (TxSEA)
  - Est. Attendees: 20
- Fri., Sept. 8, 2017 Nationwide (V) **JHB for DG**
  - Event: Disaster Preparedness Month Webisode
  - Topic: Data and Records Protection
  - Stakeholder: Nationwide Practitioners and Industry
  - Est. Attendees: 500 total for two sessions

# **Communications and Liaison – Weekly Activity Report**

## **Week of September 11, 2017**

### **Internal Communications**

#### Employee Email

- The importance of diversity and equal employment opportunity (Comm)

#### Headlines

- Tech Tip: Make the most of your online and telephone meetings (IT)
- Suicide threats require calm, specific actions (PGLD)
- Hey, Siri — am I transmitting sensitive information? (PGLD)
- Revised drug testing guidelines take effect October 1 (HCO)

#### Highlights from Services and Enforcement

- IRS employees make inroads against identity theft (DCSE)

#### Leaders' Alert

- Request your employees' end-of-year self-assessments (HCO)
- Process employees on leave without pay or seasonal non-pay status timely (HCO)
- Emergency Leave Transfer Program has been established for Hurricane Harvey (HCO)

#### Poll Question

- Hispanic Heritage Month starts on September 15 because it marks the Independence Day of how many Latin American countries? (W&I)
- What year did the National Football League (NFL) give up its nonprofit (tax-exempt) status? (C&L)

#### Spotlight

- Plan ahead (National Preparedness Month/Patriot Day) (C&L)
- Constitution Day (C&L)
- Koskinen to retire: Third time's a charm (C&L)

#### Key Agency Project

- Get to know the new IRS.gov home page (Online Services)

#### Webbie

- TSP temporarily changes hardship withdrawal rules for those affected by Hurricane Harvey (HCO)

### **Media Relations**

#### Potential news releases for this week:

- Security Summit: Don't take the bait campaign ends
- Hurricane Irma tax relief
- Amending tax returns
- Tax help still available for those who need to file
- FATCA registration renewal

#### Potential releases for coming weeks:

- IRS launches re-designed Web site
- Reminder for parents and students: Educational tax credits
- Educational tax deductions and IRS.gov resources
- Tax benefits for educators

- Injured/innocent spouse requests
- Additional LITC grant recipients announced
- Understanding the estimated tax penalty
- IRS offers one-stop resource center to new small businesses
- Scams warning – top three scams
- IRS Notices in the mail to some taxpayers

### **National Public Liaison**

Tuesday Sept. 12, 1:30 p.m. PT – SBSE Commissioner Mary Beth Murphy delivers keynote address at San Diego IRS Nationwide Tax Forum. Town & Country Hotel.

Tuesday Sept. 19, 9 a.m. – Commissioner Koskinen addresses participants in the EITC Summit. NYU Room.

### **Legislative Affairs**

NOT IRS AGENCY RECORDS



NOT IRS AGENCY RECORDS



#### **UPCOMING HEARINGS:**

Currently, there are no hearings scheduled.

#### **UPCOMING DISTRICT CONGRESSIONAL LIAISON BRANCH MEETINGS:**

NOT IRS AGENCY RECORDS



NOT IRS AGENCY RECORDS



## Social Media

### Visual Education and Communications

#### Internal Programs

1. Video to Desk-top – Live or Recorded Events:

SBSE Estate Tax Attorney and Paralegal CPE - Day 1 of 2 – Rebroadcast (09/13)  
Topic: The primary objective is the presentation of technical estate and gift law updates or new developments to IRS attorneys for the satisfaction of state mandated CLE requirements.

Audience: Our audience is primarily attorneys with considerable knowledge of estate and gift tax law. We have a few (<25) paralegals and non-lawyers but these audience members also have significant experience in estate and gift law.

Point of Contact: For more information on this program please contact [Kerry.R.Hawkins@irs.gov](mailto:Kerry.R.Hawkins@irs.gov) or call 405-982-6548

SBSE Estate Tax Attorney and Paralegal CPE - Day 2 of 2 – Rebroadcast (09/14)  
Topic: The primary objective is the presentation of technical estate and gift law updates or new developments to IRS attorneys for the satisfaction of state mandated CLE requirements.

Audience: Our audience is primarily attorneys with considerable knowledge of estate and gift tax law. We have a few (<25) paralegals and non-lawyers but these audience members also have significant experience in estate and gift law.

Point of Contact: For more information on this program please contact [Kerry.R.Hawkins@irs.gov](mailto:Kerry.R.Hawkins@irs.gov) or call 405-982-6548

2. SABA Sessions (Captioning):

TEGE - TE/GE 7114 Ethics Briefing 2017 (09/11)  
Informational/Training

SBSE - Fundamentals of IRC 482 – Transfer Pricing Transactions (09/12)  
Informational/Training

HCO - Ethics 7114-5 (09/12)  
Informational/Training

TEGE - FY17 TEGE CPE - EO Update-Topics of Interest (09/12)  
Informational/Training

PDB/C&L - Social Media Measuring Effectiveness (09/12)  
Informational/Training

HCO - Ethics 7114-6 (09/12)  
Informational/Training

IT - IT Connections Hour: 10 Strategies for Improving Your Finances (09/13)

Informational/Training

HCO - Ethics 7114-7 (09/13)

Informational/Training

HCO - Division Leaders Chat: Payroll & Personnel Systems (09/13)

Informational/Training

HCO - Ethics 7114-8 (09/13)

Informational/Training

HCO - Leadership Behavior Session (09/14)

Informational/Training

LBI - Accounting for Intangibles and Services Associated with the Sales of Tangible Property – Outbound (09/14)

Informational/Training

3. Other Projects: *(i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.)*

Avid Edit: New IRS Website Design (09/12)

Avid Edit: ASL Spec Video: Tax Terminology (09/12-09/13)

Avid Edit: New Carrollton Security Briefing (09/13)

SBSE Financial Analysis – Audio Recording (09/14)

External Programs

1. Videos Uploaded to IRS YouTube Channels:

- English Videos:
  - New IRS Website Design
  - What To Do After a Tax Professional Data Compromise (Pending Approval)

**Stakeholder Liaison Field**

- Mon., Sept. 11, 2017 San Francisco, CA (F2F) **KD for DG**
  - Federal Agencies that Impact Business and Industry
  - Topic: The meeting will focus on how federal agencies and departments interact with local business and industry.
  - Stakeholder: Department of Labor, Small Business Administration, Social Security Administration
  - Est. Attendees: 75
- Tues., Sept. 12, 2017 LaPlata, MD (F2F) **DY**
  - Small Business Resource Start-Up Tips
  - Topic: Tax Scheme Awareness; Dirty Dozen; Employer Tax Withholding Responsibilities; Employment Tax Issues; Identity Theft and Phishing; New Entrepreneurs Initiative; Tax Security Awareness
  - Stakeholder: New Entrepreneurs

- Est. Attendees: 65
- Tues., Sept. 12, 2017 Mobile, AL (V) **SG for CEC**
  - Alabama Virtual Small Business Forum
  - Topic: Don't Take the Bait (National Tax Security Summer Summit); Due Date for Information Return Statements W-2 and 1099-Misc (Box 7); Form 2290, Heavy Highway Vehicle Use Tax; ITIN Renewal Process; Online Account Information for Balance Due; Private Debt Collection; Tax Scheme Awareness; Direct Pay; Identity Theft and Phishing; Leveraged SB Tax Workshops; Online Tax Calendar; Social Media;
  - Stakeholder: SBA, ASBDC Network, Alabama Department of Economic and Community Affairs (ADECA), State Small Business Credit Initiative
  - Est. Attendees: 25
- Tues., Sept. 12, 2017 Richmond, VA (V) **DY**
  - Virginia Virtual Small Business Forum
  - Topic: Online Account Information for Balance Due; Private Debt Collection
  - Stakeholder: Entrepreneurs
  - Est. Attendees: 20
- Wed., Sept. 13, 2017 Pittsburgh, PA (F2F) **MAR**
  - Western PA APA Quarterly Chapter Meeting
  - Topic: Don't Take the Bait (National Tax Security Summer Summit); Online Account Information for Balance Due; Private Debt Collection; Tax Scheme Awareness; Employer Tax Withholding Responsibilities; Identity Theft and Phishing; Independent Contractor or Employee; Information Reporting and Document Matching (IRDM); ITIN Outreach - Path Act; New due dates for information return statements W-2 & 1099-MISC for 2017; New Secure Access Process for Get Transcript; Third Party Payers
  - Stakeholder: Western PA APA
  - Est. Attendees: 60
- Wed., Sept. 13, 2017 Columbia, SC (V) **DY**
  - Upstate SC APA Payroll Seminar
  - Topic: Don't Take the Bait (National Tax Security Summer Summit); Online Account Information for Balance Due; Private Debt Collection; Tax Scheme Awareness; Backup Withholding; New due dates for information return statements W-2 & 1099-MISC for 2017; Payment Options; Tax Security Awareness; Third Party Payers
  - Stakeholders: Upstate SC APA
  - Est. Attendees: 70
- Wed., Sept. 13, 2017 Detroit, MI (V) **KW**
  - Stakeholder Relationship Management Liaison Council (SMRLC)
  - Topic: IMRS, ITIN Renewal, Disaster Preparedness
  - Stakeholders: Internal BODs
  - Est. Attendees: 15
- Thurs., Sept. 14, 2017 Carson, CA (F2F) **KD for DG**
  - Expanding Entrepreneurship
  - Topic: Online Payment Agreements; Collection User Fees; New Entrepreneurs Initiative
  - Stakeholder: International Chamber of Commerce

- Est. Attendees: 25
- Thurs., Sept. 14, 2017 State of Nebraska (V) **SG for CEC**
  - Nebraska Stakeholder Relationship Management Liaison Council (SMRLC)
  - Topic: Identity Theft and Phishing; Practitioner Data Breaches; Tax Security Awareness
  - Stakeholder: Internal BOD's
  - Est. Attendees: 10
- Thurs., Sept. 14, 2017 Atlantic City, NJ (F2F) **MAR**
  - 2017 Statewide APA Conference
  - Topic: Don't Take the Bait (National Tax Security Summer Summit); Online Account Information for Balance Due; Passport Revocation or Denial; Private Debt Collection; Taxpayer Digital Communications (TDC); Independent Contractor or Employee
  - Stakeholders: Statewide APA
  - Est. Attendees: 120
- Thurs., Sept. 14, 2017 Chicago, IL (V) **SG for CEC**
  - Multilingual Small Business Forum
  - Topic: Don't Take the Bait (National Tax Security Summer Summit); Form 2290, Heavy Highway Vehicle Use Tax; Tax Scheme Awareness; Taxpayer Digital Communications (TDC)
  - Stakeholder: Small Business Roundtable
  - Est. Attendees: 9
- Thurs., Sept. 14, 2017 Las Vegas, NV (F2F) **KD for DG**
  - Small Business Forum
  - Topic: Don't Take the Bait (National Tax Security Summer Summit); ITIN Renewal Process; Online Account Information for Balance Due; Private Debt Collection; Tax Scheme Awareness
  - Stakeholder: Nevada Department of Business and Industry
  - Est. Attendees: 20
- Fri., Sept. 15, 2017 New York, NY (F2F) **MCP**
  - Greater New York Chamber of Commerce
  - Topic: Don't Take the Bait (National Tax Security Summer Summit); Online Account Information for Balance Due; Private Debt Collection; Collection User Fees; Dirty Dozen; ITIN Outreach - Path Act; Online Payment Agreements; Sharing Economy; Work Opportunity Tax Credit (WOTC)
  - Stakeholders: Greater New York Chamber of Commerce & Greater New York Harlem Chamber of Commerce
  - Est. Attendees: 60
- Fri., Sept. 15, 2017 Broken Arrow, OK (F2F) **SG for CEC**
  - 2017 Oklahoma APA Annual Meeting
  - Topic: Don't Take the Bait (National Tax Security Summer Summit); Form 2290, Heavy Highway Vehicle Use Tax; Online Account Information for Balance Due; Private Debt Collection; Tax Scheme Awareness; Taxpayer Digital Communications (TDC); Changes to OIC Policy; Collection User Fees; CPEO; Direct Pay; Dirty Dozen; ITIN Outreach - Path Act; New due



- dates for information return statements W-2 & 1099-MISC for 2017; Practitioner Data Breaches)
  - Stakeholder: Oklahoma City APA Chapter
  - Est. Attendees: 125
- Fri., Sept. 15, 2017 King of Prussia, PA (F2F) **MAR**
  - 2017 Statewide APA Convention
  - Topic: Identity Theft and Phishing; Practitioner Data Breaches; Tax Security Awareness
  - Stakeholder: Southeastern PA APA Chapter
  - Est. Attendees: 150
- Fri., Sept. 15, 2017 Richmond, VA (V) **DY**
  - Practitioner Liaison Meeting
  - Topic: Collection User Fees; Online Payment Agreements; Appeals Judicial Approach and Culture (AJAC); Direct Pay; Future State; Payment Options; Practitioner Data Breaches; Private Debt Collection; Reporting abusive tax promotions and/or promoters - Lead Development Center
  - Stakeholder: VA Practitioner Organizations
  - Est. Attendees: 25
- Fri., Sept. 15, 2017 Nationwide (V) **KD for DG**
  - Event: Disaster Preparedness Month Webisode
  - Topic: Federal Tax Relief
  - Stakeholder: Nationwide Practitioners and Industry
  - Est. Attendees: 500 total for two sessions
- Sat., Sept. 16, 2017 Portland, OR (F2F) **KH**
  - Oregon Small Business Fair
  - Topic: New Entrepreneurs Initiative
  - Stakeholder: Small Business Associations
  - Est. Attendees: 200
- Sat., Sept. 16, 2017 Chicago, IL (F2F) **SG for CEC**
  - Asian Business Expo
  - Topic: Don't Take the Bait (National Tax Security Summer Summit); Form 2290, Heavy Highway Vehicle Use Tax; Tax Scheme Awareness; Taxpayer Digital Communications (TDC); New Entrepreneurs Initiative
  - Stakeholder: Illinois Department of Commerce and Economic Opportunity
  - Est. Attendees: 150

# **Communications and Liaison – Weekly Activity Report**

## **Week of September 18, 2017**

### **Internal Communications**

#### Headlines

- Use new Privacy in Practice Guide in your daily work routine (PGLD)
- IT expands service offerings with Web Chat (IT)
- Know what to do if your direct deposit is late (HCO)
- myRA retirement program being phased out, no longer accepting new enrollments (HCO)

#### Highlights from Services and Enforcement

- SB/SE Collection works to recoup billions in unpaid employment taxes (DCSE)

#### Leaders' Alert

- Learn how to retain and engage your talented workforce (Multiple)
- Encourage your employees to volunteer for the 2017 Combined Federal Campaign (AWSS)

#### Poll Question

- About how many fax machines does the IRS plan to retire by year's end? (IT)

#### Spotlight

- Practicing proper punctuation (C&L)
- You do you (embracing your skills) (Multiple)

#### Webbie

- Is private practice or starting your own company in your post-IRS plans? (Counsel)
- Email UNAX team with your unauthorized access questions (PGLD)
- TSP hardship withdrawal rules change for those affected by Hurricanes Harvey, Irma (HCO)
- IT updating certain network printers to address security vulnerabilities (IT)
- Focus on driving when you're behind the wheel (AWSS)

### **Media Relations**

#### Potential news releases for this week:

- Hurricane-related tax relief
- Reminder for parents and students: Educational tax credits
- Educational tax deductions and IRS.gov resources
- Tax benefits for educators
- IRS launches re-designed Web site
- Tax help still available for those who need to file

#### Potential releases for coming weeks:

- Injured/innocent spouse requests
- Understanding the estimated tax penalty
- IRS offers one-stop resource center to new small businesses
- Scams warning – top three scams
- IRS Notices in the mail to some taxpayers
- Additional LITC grant recipients announced

## **National Public Liaison**

Tuesday, Sept. 19, 9:00-9:30 a.m. – Commissioner Koskinen addresses participants in the EITC Summit. NYU Room.

## **Legislative Affairs**

NOT IRS AGENCY RECORDS



### **UPCOMING HEARINGS:**

Currently, there are no hearings scheduled.

### **NEW DISTRICT CONGRESSIONAL LIAISON BRANCH MEETINGS:**

NOT IRS AGENCY RECORDS



### **UPCOMING DISTRICT CONGRESSIONAL LIAISON BRANCH MEETINGS:**

NOT IRS AGENCY RECORDS



## **Social Media**

## **Visual Education and Communications**

### **Internal Programs**

#### **1. Video to Desk-top – Live or Recorded Events:**

SBSE Estate Tax Attorney and Paralegal CPE - Day 1 of 2 – Rebroadcast (09/20)

Topic: The primary objective is the presentation of technical estate and gift law updates or new developments to IRS attorneys for the satisfaction of state mandated CLE requirements.

Audience: Our audience is primarily attorneys with considerable knowledge of estate and gift tax law. We have a few (<25) paralegals and non-lawyers but these audience members also have significant experience in estate and gift law.

Point of Contact: For more information on this program please contact [Kerry.R.Hawkins@irs.gov](mailto:Kerry.R.Hawkins@irs.gov) or call 405-982-6548

SBSE Estate Tax Attorney and Paralegal CPE - Day 2 of 2 – Rebroadcast (09/21)  
Topic: The primary objective is the presentation of technical estate and gift law updates or new developments to IRS attorneys for the satisfaction of state mandated CLE requirements.

Audience: Our audience is primarily attorneys with considerable knowledge of estate and gift tax law. We have a few (<25) paralegals and non-lawyers but these audience members also have significant experience in estate and gift law.

Point of Contact: For more information on this program please contact [Kerry.R.Hawkins@irs.gov](mailto:Kerry.R.Hawkins@irs.gov) or call 405-982-6548

2. Other Projects: (*i.e. Video tapings, Audio Recordings, Editing, etc. for Internal and External Products.*)

Avid Edit: ASL Spec Video: Tax Terminology (09/19-09/20)

### External Programs

1. Videos Uploaded to IRS YouTube Channels:

- English Videos:
  - What To Do After a Tax Professional Data Compromise (Pending Approval)

2. Servicewide Video Editorial Board (SVEB) – External:

Request VR#600 - Webinar: Don't Take the Bait – Protect Your Clients and Yourself  
Target Audience: External, tax practitioner community  
Informational Message

Request VR#601 – TEGE - Self-Dealing Exception for Compensation to Disqualified Persons Captivate Presentation  
Target Audience: External audience, tax practitioners, public, TEGE taxpayers  
Informational Message

Request VR#602 – TEGE - Disqualified Persons of Private Foundations Captivate Presentation  
Target Audience: External audience, tax practitioners, public, TEGE taxpayers  
Informational Message

AMENDED Request VR#569 – LB&I Webinar - The ITIN Process  
Target Audience: Internal/External. IRS employees and taxpayers  
Informational Message

### Stakeholder Liaison Field

- Tues., Sept. 19, 2017 Chula Vista, CA (F2F) **JHB for DG**
  - Small Business Association Open House
  - Topic: Due Date for Information Return Statements W-2 and 1099-Misc (Box 7); Employment Tax Issues; Identity Theft and Phishing; Independent Contractor or Employee; ITIN Outreach - Path Act
  - Stakeholder: Small Business Association – San Diego District
  - Est. Attendees: 100
- Tues., Sept. 19, 2017 Mobile, AL (V) **CEC**
  - Mid-South IMRS Updates

- Topic: E-Services Authentication Process; Future State; Identity Theft and Phishing; Practitioner Data Breaches; Return Preparer Review Strategy; Technology (Utilized for Event)
  - Stakeholder: Mid-South Tax Practitioner Organizations
  - Est. Attendees: 25
- Tues., Sept. 19, 2017 Kansas City, MO (F2F) **CEC**
  - AFWA Chapter Meeting
  - Topic: Don't Take the Bait (National Tax Security Summer Summit); Form 2290, Heavy Highway Vehicle Use Tax; Online Account Information for Balance Due; Private Debt Collection; Tax Scheme Awareness; Taxpayer Digital Communications (TDC); Online Tax Calendar; Payment Options; Practitioner Data Breaches; Practitioner Priority Service
  - Stakeholder: Accounting & Financial Women's Alliance
  - Est. Attendees: 22
- Tues., Sept. 19, 2017 Bethlehem, PA (F2F) **MAR**
  - PSTAP Lehigh Valley Chapter Meeting
  - Topic: Don't Take the Bait (National Tax Security Summer Summit); Form 2290, Heavy Highway Vehicle Use Tax; Online Account Information for Balance Due; Private Debt Collection; Tax Scheme Awareness; Taxpayer Digital Communications (TDC); Automated Underreporter Program (AUR); Correspondence Exams; Dirty Dozen; Identity Theft and Phishing; Practitioner Data Breaches
  - Stakeholder: PA Society of Tax
  - Est. Attendees: 115
- Tues., Sept. 19, 2017 Phoenix, AZ (F2F) **GT**
  - Small Business Forum
  - Topic: Private Debt Collection; Tax Scheme Awareness; Sharing Economy
  - Stakeholder: City of Phoenix Economic Development, Department of Labor, Small Business Administration, SCORE and SBDC,
  - Est. Attendees: 20
- Wed., Sept. 20, 2017 Indianapolis, IN (F2F) **KW**
  - Indianapolis Statewide APA Conference
  - Topic: IRS resources, ID theft information, W-2 Verification Code Pilot update
  - Stakeholder: Indianapolis, IN APA
  - Est. Attendees: 100
- Wed., Sept. 20, 2017 Birmingham, AL (F2F) **CEC**
  - Taxpayer Advocate Congressional Liaison Meeting
  - Topic: Don't Take the Bait (National Tax Security Summer Summit); Form 2290, Heavy Highway Vehicle Use Tax; Online Account Information for Balance Due; Private Debt Collection; Tax Scheme Awareness; ITIN Outreach - Path Act; New due dates for information return statements W-2 & 1099-MISC for 2017
  - Stakeholder: Congresswoman Terri Fewell's Office Staff
  - Est. Attendees: 20
- Wed., Sept. 20, 2017 Williamsburg, VA (F2F) **DY**
  - Greater Williamsburg Chamber "Lunch & Learn"
  - Topic: Disaster presentation, IRS Resources for New Entrepreneurs

- Stakeholder: Greater Williamsburg Chamber of Commerce
  - Est. Attendees: 30
- Wed., Sept. 20, 2017 Binghamton, NY (F2F) **MCP**
  - Resources and Tax Tips for Small Business
  - Topic: Payment Options and Other Online Tools; Private Debt Collection; Collection User Fees; Identity Theft and Phishing; Independent Contractor or Employee; New due dates for information return statements W-2 & 1099-MISC for 2017; New Entrepreneurs Initiative; Payment Options; Sched. C Initiative; Sharing Economy
  - Stakeholder: SCORE Binghamton with additional representation of City of Binghamton Economic Development, Broome County IDA, SBDC, SBA, Broome County Economic Development, Tioga County Economic Development, Broome County Chamber of Commerce, Binghamton Chamber of Commerce
  - Est. Attendees: 60
- Wed., Sept. 20, 2017 Lexington, KY (F2F) **CEC**
  - SCORE Chapter Meeting
  - Topic: Identity Theft and Phishing; Leveraged SB Tax Workshops; New Entrepreneurs Initiative; Online Payment Agreements; Sched. C Initiative; Small Business Recordkeeping
  - Stakeholder: SCORE – Lexington Chapter
  - Est. Attendees: 18
- Wed., Sept. 20, 2017 Boston, MA (V) **MCP**
  - IMRS Call
  - Topic: IMRS Issues
  - Stakeholders: NY, NH, MA Practitioner Organizations
  - Est. Attendees: 25
- Wed., Sept. 20, 2017 Columbia, SC (V) **DY**
  - Annual South Carolina Society of Enrolled Agents Meeting
  - Topic: Don't Take the Bait (National Tax Security Summer Summit); Due Date for Information Return Statements W-2 and 1099-Misc (Box 7); ITIN Renewal Process; Online Account Information for Balance Due; Private Debt Collection; Tax Scheme Awareness; Identity Theft and Phishing; Practitioner Data Breaches; Practitioner Priority Service; Reporting abusive tax promotions and/or promoters - Lead Development Center; Tax Security Awareness; Third Party Payers
  - Stakeholder: South Carolina Enrolled Agents Society
  - Est. Attendees: 110
- Wed., Sept. 20, 2017 Roanoke, VA (V) **DY**
  - Get Transcripts & E-Services for Professionals
  - Topic: E-Services Authentication Process; New Secure Access Process for Get Transcript
  - Stakeholder: Virginia Society of Enrolled Agents – Blue Ridge Chapter
  - Est. Attendees: 30
- Wed., Sept. 20, 2017 St. Cloud, MN (F2F) **KW**
  - NATP Minnesota Fall Conference

- Topic: Identity Theft and Phishing; Practitioner Data Breaches; Don't Take the Bait; Monitoring of EFIN/PTIN; Private Debt Collection; Correspondence Audits; View Accounts Online
  - Stakeholder: Minnesota NATP
  - Est. Attendees: 115
- Thurs., Sept. 21, 2017 Wisconsin Dells, WI (F2F) **CEC**
  - 2017 WI Statewide American Payroll Association meeting
  - Topic: Dirty Dozen; Identity Theft and Phishing; Tax Security Awareness
  - Stakeholder: Greater Madison WI APA Chapter
  - Est. Attendees: 130
- Thurs., Sept. 21, 2017 Danville, KY (F2F) **CEC**
  - Danville-Boyle County Chamber of Commerce Breakfast Workshop - Disaster Preparedness and Recovery
  - Topic: Don't Take the Bait (National Tax Security Summer Summit); Form 2290, Heavy Highway Vehicle Use Tax; Tax Scheme Awareness
  - Stakeholder: Danville Boyle County Chamber of Commerce
  - Est. Attendees: 50
- Thurs, Sept. 21, 2017 Philadelphia, PA (V) **MAR**
  - Delaware SRMLC Meeting
  - Topic: Identity Theft and Phishing; Practitioner Data Breaches
  - Stakeholder: Internal BOD's
  - Est. Attendees: 9
- Thurs., Sept. 21, 2017 Springfield, IL (V) **CEC**
  - Central Quarterly IMRS Chat
  - Topic: IMRS Issues
  - Stakeholder: Central Area Practitioners
  - Est. Attendees: 20
- Thurs., Sept. 21, 2017 Tacoma, WA (F2F) **KH**
  - 29<sup>th</sup> Annual Northwest Regional Payroll Conference
  - Topic: Backup Withholding; Employment Tax Issues; Identity Theft and Phishing
  - Stakeholder: Rainier Chapter of American Payroll Association
  - Est. Attendees: 250
- Thurs., Sept. 21, 2017 Urbandale, IA (F2F) **KW**
  - Iowa NATP Annual Seminar
  - Topic: Private Debt Collection; Identity Theft and Phishing; Practitioner Data Breaches; Don't Take the Bait; Monitoring of EFIN/PTIN; Correspondence Audits; View Account Online; ITIN
  - Stakeholder: NATP - Iowa
  - Est. Attendees: 40
- Thurs., Sept. 21, 2017 Greensboro, NC (F2F) **DY**
  - North Carolina Society of Enrolled Agents (NCSEA) Fall Event
  - Topic: Private Debt Collection; Collection User Fees; Direct Pay; Identity Theft and Phishing; Payment Options; Practitioner Data Breaches; Social Media; Tax Security Awareness;
  - Stakeholder: North Carolina Society of Enrolled Agents (NCSEA)
  - Est. Attendees: 175



- Thurs, Sept. 21, 2017 Pigeon Forge, TN (F2F) **CEC**
  - TN NATP Statewide Meeting
  - Topic: Don't Take the Bait (National Tax Security Summer Summit); Form 2290, Heavy Highway Vehicle Use Tax; Online Account Information for Balance Due; Passport Revocation or Denial; Private Debt Collection; Tax Scheme Awareness; Taxpayer Digital Communications (TDC)
  - Stakeholder: National Association of Tax Professionals
  - Est. Attendees: 75
- Fri., Sept. 22, 2017 Sacramento, CA (F2F) **JHB for DG**
  - CSEA State Tax Agencies Liaison Meeting
  - Topic: IMRS
  - Stakeholders: Franchise Tax Board (FTB), the California Department of Tax and Fee Administration (formerly Board of Equalization) and the Employment Development Department (EDD).
  - Est. Attendees: 150
- Fri., Sept. 22, 2017 Bath, MI (F2F) **KW**
  - Michigan NATP Seminar
  - Topic: Don't Take the Bait (National Tax Security Summer Summit); ITIN Renewal Process; Online Account Information for Balance Due; Private Debt Collection; Taxpayer Digital Communications (TDC); E-Services Authentication Process; Practitioner Data Breaches
  - Stakeholder: National Association of Tax Professionals – Michigan Chapter
  - Est. Attendees: 225
- Fri., Sept. 22, 2017 Knoxville, TN (F2F) **CEC**
  - TSCPA Chapter Meeting
  - Topic: Don't Take the Bait (National Tax Security Summer Summit); ITIN Renewal Process; Online Account Information for Balance Due; Private Debt Collection; Taxpayer Digital Communications (TDC); E-Services Authentication Process; Practitioner Data Breaches
  - Stakeholder: TSCPA Knoxville Chapter
  - Est. Attendees: 35
- Fri., Sept. 22, 2017 Nationwide (V) **JHB for DG**
  - Event: Disaster Preparedness Month Webisode
  - Topic: Calculating and Report Disaster Area Losses
  - Stakeholder: Nationwide Practitioners and Industry
  - Est. Attendees: 500 total for two sessions
- Sat., Sept. 23, 2017 New York, NY (F2F) **MCP**
  - Business Seminar
  - Topic: Don't Take the Bait (National Tax Security Summer Summit); Online Account Information for Balance Due; Private Debt Collection; Tax Scheme Awareness; ITIN Outreach - Path Act; Online Payment Agreements
  - Stakeholders: The New York City Advocate and the Asian American Bar Association of New York at Fordham University School of Law
  - Est. Attendees: 100

# **Communications and Liaison – Weekly Activity Report**

## **Week of September 18, 2017**

### **Internal Communications**

#### IRS Headlines

- Know when to expect your lump-sum annual leave payment when you retire (HCO)
- SharePoint crosswalk helps you understand version differences (IT)
- Establish an Occupant Emergency Plan Individual Accommodation Module (AWSS)
- Federal Employee Life Insurance elections made in 2016 take effect October 1 (HCO)
- Changes are coming to the Combined Federal Campaign (AWSS)

#### Highlights from Services and Enforcement

- Online Services component library to provide consistent look, feel to web products, services (DCSE)

#### Leaders' Alert

- Talk with your employees about the retention standard (HCO)
- You're the first point of contact for employees with payroll issues (HCO)
- Leave without pay report can help you manage within-grade increases (HCO)
- Use revised Form 14365 to process requests for forgiveness of advance leave for separating employees (HCO)
- Upcoming mandatory TIGTA survey on pocket commissions (AWSS)
- Learn about important changes to the Agency Grievance System (HCO)
- Emergency Leave Transfer Program has been established for Hurricane Irma (HCO)

#### Poll Question

- Where you can verify or change your salary direct deposit information? (HCO)
- Which official IRS Twitter account has the most followers? (C&L)

#### Spotlight

- National Hispanic Heritage Month (C&L)

#### Daily News (webbies)

- Get up to 70 percent off tuition for higher education (HCO)
- Time is running out to take your mandatory briefings (HCO)
- Need help coping with the aftermath of hurricanes? (HCO)
- Plan ahead for Columbus Day weekend power outage, Friday, 10/6 – Tuesday, 10/10 (IT)
- Request leave or donate leave to co-workers affected by Hurricane Irma (HCO)

### **Media Relations**

#### Potential news releases for this week:

- Hurricane-related tax relief – recap of all relief
- Drought-stricken farmers/ranchers have more time to replace livestock
- Low-income housing units nationwide offered for displaced disaster victims
- Reminder for parents and students: Educational tax credits
- Educational tax deductions and IRS.gov resources

- Tax benefits for educators
- Tax help still available for those who need to file

Potential releases for coming weeks:

- Injured/innocent spouse requests
- Understanding the estimated tax penalty
- IRS offers one-stop resource center to new small businesses
- Scams warning – top three scams
- IRS Notices in the mail to some taxpayers
- IRS launches re-designed Web site
- Oct. 16 deadline for extension filers

### **National Public Liaison**

Tuesday, Sept. 19, 9:00-9:30 a.m. – Commissioner Koskinen addresses participants in the EITC Summit. NYU Room.

### **Legislative Affairs**

#### **UPCOMING MEETINGS:**

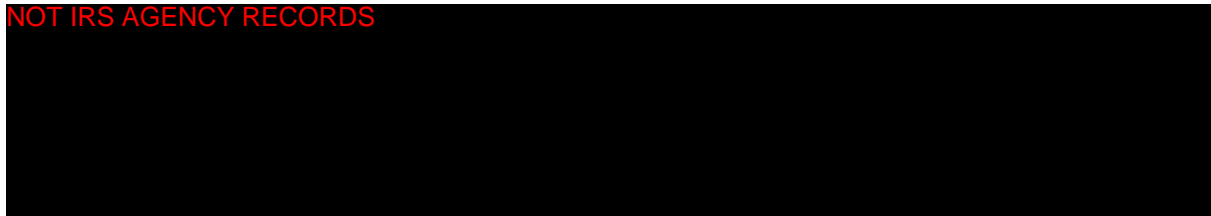
Currently, there are no meetings scheduled.

#### **UPCOMING HEARINGS:**

On Wednesday, October 4, 2017, a hearing is scheduled to be held before the Ways & Means Oversight Subcommittee, House Ways and Means Committee on the state of IRS' information technology. The hearing is scheduled for 2:00 pm, in room 1100 of the Longworth House Office Building.

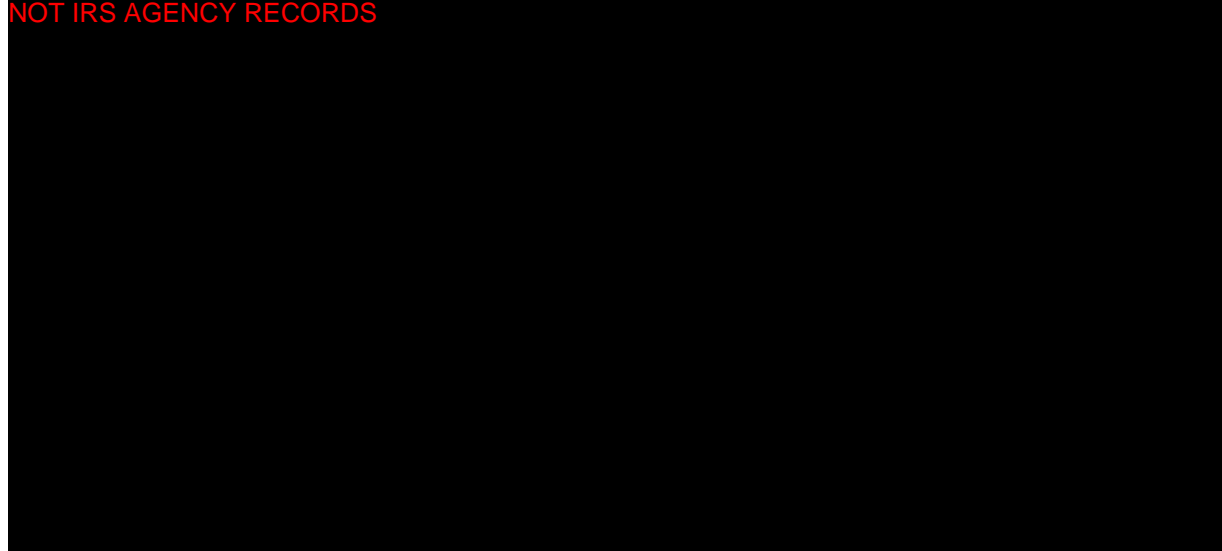
Witnesses: Jeff Tribiano, Deputy Commissioner for Operations Support and Gina Garza, Chief Information Officer are scheduled to testify

NOT IRS AGENCY RECORDS



#### **UPCOMING DISTRICT CONGRESSIONAL LIAISON BRANCH MEETINGS:**

NOT IRS AGENCY RECORDS



## Social Media

WEB – Current front page

- ASL VIDEO: Preparing for Disasters: <https://youtu.be/6jJvMXTZggY>
- Embedded Tweet: Hay créditos tributarios que pueden ayudar a compensar los gastos calificados de la educación. <https://go.usa.gov/xRuVQ> [#IRS](#)

TWITTER

### **Topics include:**

- Hurricane Maria *\*New*
- Disaster Relief
- Volunteer for VITA/TCE
- Shared Economy *\*New images*
- Education Benefits *\*New*

- Educator's deduction
- Oct 15 deadline *\*New*
- Get Transcript feature – disaster victims *\*New*
- Where's my amended return *\*New*
- Disaster preparedness month

#### FB TABS

- Hot Topics: Let Us Help You
- Tax Scams: Tax Scams / Consumer Alerts
- ITIN Info
- YouTube
- Truckers Tax Center
- Informacion sobre ITIN
- EO Select Check
- Student Loan Application
- Security Summit
- Taxpayer Bill of Rights

#### Stakeholder Liaison Field

- Mon., Sept. 25, 2017 New York, NY (F2F) **MCP**
  - How Government Resources Can Help Your Business
  - Live TV Interview, [Bronxnet Cable TV](#)
  - Topic: Private Debt Collection; 2017 National Small Business Week (April 30 - May 6); Changes to OIC Policy; Collection User Fees; Dirty Dozen; Future State; ITIN Outreach - Path Act; Online Payment Agreements; Small Business Recordkeeping
  - Stakeholders: NYC Taxpayer Advocate, NYC Comptroller Office, NYS Department of Labor
  - Est. Attendees: 20
- Mon., Sept. 25, 2017 Wheaton, IL (F2F) **CEC**
  - ILCPA Fox Valley Chapter Meeting
  - Topic: Don't Take the Bait (National Tax Security Summer Summit); Form 2290, Heavy Highway Vehicle Use Tax; Online Account Information for Balance Due; Private Debt Collection; Tax Scheme Awareness; Taxpayer Digital Communications (TDC); Automated Underreporter Program (AUR); Changes to OIC Policy; Correspondence Exams; Field Audit Process
  - Stakeholder: IL CPA Fox Valley Chapter
  - Est. Attendees: 35
- Mon., Sept. 25, 2017 Ridgeland, MS (F2F) **CEC**
  - Mississippi Association of Public Accountants Gear Up Business Entities
  - Topic: Collection User Fees; Future State; Identity Theft and Phishing; New Secure Access Process for Get Transcript; Online Payment Agreements; Refundable Credits PATH Due Diligence and Tax Law changes TBD
  - Stakeholder: MS Association of Public Accountants
  - Est. Attendees: 75
- Mon., Sept. 25, 2017 South Carolina (V) **DY**
  - South Carolina PLM
  - Topic: Don't Take the Bait (National Tax Security Summer Summit); Form 2290, Heavy Highway Vehicle Use Tax; Online Account Information for Balance Due; Private Debt Collection; Tax Scheme Awareness; Changes

- to OIC Policy; ITIN Outreach - Path Act; New due dates for information return statements W-2 & 1099-MISC for 2017
  - Stakeholder: South Carolina Practitioner Organizations
  - Est. Attendees: 30
- **Tues., Sept. 26, 2017 New York, NY (F2F) MCP**
  - English As a Second Language Tax Symposium
  - Topic: Don't Take the Bait (National Tax Security Summer Summit); Online Account Information for Balance Due; ITIN Outreach - Path Act; Online Payment Agreements
  - Stakeholders: The Asian American Bar Association, NYC Taxpayer Advocate, NYC Comptroller Office, Local Taxpayer Advocate, NY Low Income Tax Clinic, NYS State Department of Taxation and Finance, Lehman College SBDC, and NY Hispanic Chamber of Commerce
  - Est. Attendees: 300
- **Tues., Sept. 26, 2017 Columbia, MD (F2F) DY**
  - Practitioner Liaison Meeting
  - Topic: Changes to OIC Policy; Private Debt Collection; Identity Theft and Phishing; Practitioner Data Breaches; Reporting abusive tax promotions and/or promoters - Lead Development Center; Return Preparer Review Strategy; Sharing Economy
  - Stakeholder: Columbia, MD Practitioner Organizations
  - Est. Attendees: 30
- **Tues., Sept. 26, 2017 Oakland, CA (F2F) JHB for DG**
  - Cyber and Data Security Symposium
  - Topic: Tax Scheme Awareness; Identity Theft and Phishing; Practitioner Data Breaches
  - Stakeholders: California Society of Enrolled Agents (CSEA), California Society of CPAs (CalCPA), and American Payroll Association (APA)
  - Est. Attendees: 150
- **Wed., Sept. 27, 2017 Bronx, NY (F2F) MCP**
  - English As a Second Language Tax Symposium
  - Topic: Don't Take the Bait (National Tax Security Summer Summit); Online Account Information for Balance Due; ITIN Outreach - Path Act; Online Payment Agreements
  - Stakeholders: Lemman College in collaboration with the NYC Taxpayer Advocate, NYC Comptroller Office, Local Taxpayer Advocate, NY Low Income Tax Clinic, NYS State Department of Taxation and Finance, Lehman College SBDC, and NY Hispanic Chamber of Commerce
  - Est. Attendees: 300
- **Wed., Sept. 27, 2017 West Orange, NJ (F2F) MAR**
  - 2017 IRS Tax Law Update
  - Topic: Automated Underreporter Program (AUR), Correspondence Exams, Private Debt Collection, Field Assistance, New Secure Access Process for Get Transcript, Taxpayer Digital Communications (TDC), Online Account Information for Balance Due, Direct Pay, Collection User Fees, Don't Take the Bait (National Tax Security Summer Summit),
  - Stakeholder: New Jersey Practitioners
  - Est. Attendees: 100
- **Wed., Sept. 27, 2017 Cincinnati, OH (F2F) NG for KW**
  - Cincinnati Accounting Show
  - Topic: Identity Theft and Phishing, Tax Professional Data Theft and Protection, "Don't Take the Bait" campaign, Private Debt Collection and ITIN Outreach
  - Stakeholder: Ohio Society of CPA's

- Est. Attendees: 45
- Wed., Sept. 27, 2017 Las Vegas, NV (F2F) **JHB for DG**
  - NATP National Convention
  - Topic: Payment Options and Other Online Tools; Practitioners Filing Accurate EITC and Refundable Credits Returns; Private Debt Collection; Tax Scheme Awareness; Collection User Fees; Direct Pay; Dirty Dozen; EITC Due Diligence; Future State; Identity Theft and Phishing; ITIN Outreach - Path Act; Online Payment Agreements; Payment Options; Practitioner Data Breaches; Sharing Economy
  - Stakeholder: National Association of Tax Practitioners
  - Est. Attendees: 1,200
- Wed., Sept. 27, 2017 McClean, VA (F2F) **DY**
  - Tax Scheme Awareness & Private Debt Collection
  - Topic: Private Debt Collection; Tax Scheme Awareness
  - Stakeholder: Virginia Society of Enrolled Agents
  - Est. Attendees: 35
- Wed., Sept. 27, 2017 San Diego, CA (V) **JHB for DG**
  - Small Business Forum
  - Topic: Small Business Resources with an emphasis on Employer Responsibilities and Worker Classification
  - Stakeholder: SBDC, Chamber of Commerce, SBA, EDD, DOL
  - Est. Attendees: 35
- Wed., Sept. 27, 2017 San Jose, CA, WI (F2F) **JHB for DG**
  - 23rd Annual Tax Practitioner & IRS Fall Seminar
  - Topic Don't Take the Bait (National Tax Security Summer Summit); Private Debt Collection; Collection User Fees; Direct Pay; Field Audit Process; Identity Theft and Phishing; Online Payment Agreements; Payment Options; Practitioner Data Breaches
  - Stakeholder: California Society of Enrolled Agents
  - Est. Attendees: 100
- Thurs., Sept. 28, 2017 Saratoga, NY (F2F) **MCP**
  - 2017 NY Statewide Payroll Conference
  - Topic: Don't Take the Bait (National Tax Security Summer Summit); Form 2290, Heavy Highway Vehicle Use Tax; Tax Scheme Awareness
  - Stakeholder: New York APA
  - Est. Attendees: 85
- Thurs., Sept. 28, 2017 New York, NY (F2F) **MCP**
  - English As a Second Language Tax Symposium
  - Topic: Don't Take the Bait (National Tax Security Summer Summit); Online Account Information for Balance Due; ITIN Outreach - Path Act; Online Payment Agreements
  - Stakeholders: NY Councilman Carlos Menchaca, The Brooklyn Hispanic Chamber of Commerce, The Sunset Park Business Improvement District in in collaboration with the NYC Taxpayer Advocate, NYC Comptroller Office, Local Taxpayer Advocate, LULAC, NY State Columbian American Chamber of Commerce, NY Low Income Tax Clinic, and NYS State Department of Taxation and Finance
  - Est. Attendees: 300
- Thurs., Sept. 28, 2017 Southgate, CA (F2F) **JHB for DG**
  - Southgate Chamber 2017 Seminars
  - Topic: Taxpayer Digital Communications (TDC), Payment Options, Private Debt Collection
  - Stakeholder: Southgate Chamber of Commerce
  - Est. Attendees: 25

- Thurs., Sept. 28, 2017 Saddle Brook, NJ (F2F) **MAR**
  - 2017 IRS Tax Law Updates
  - Topic: Automated Underreporter Program (AUR), Correspondence Exams, Private Debt Collection, Field Assistance, New Secure Access Process for Get Transcript, Taxpayer Digital Communications (TDC), Online Account Information for Balance Due, Direct Pay, Collection User Fees, Don't Take the Bait (National Tax Security Summer Summit),
  - Stakeholder: Rainier Chapter of American Payroll Association
  - Est. Attendees: 100
- Thurs., Sept. 28, 2017 Oklahoma, OK (F2F & Virtual) **CEC**
  - 2017 Oklahoma Tax Practitioner Symposium
  - Topic: Don't Take the Bait (National Tax Security Summer Summit); Online Account Information for Balance Due; Private Debt Collection; Tax Scheme Awareness; Taxpayer Digital Communications (TDC); Changes to OIC Policy; Early Interaction Initiative - FTD Alerts; EITC Due Diligence; Form 8300 - Report of Cash Payments over \$10000 Received in a Trade or Business; Future State; Identity Theft and Phishing; ITIN Outreach - Path Act; Office of Professional Responsibility (OPR); Online Payment Agreements; Payment Options; Practitioner Data Breaches; Return Preparer Review Strategy; Rules of Representation (RPO); Tax Security Awareness
  - Stakeholder: OK Society of Accountants, OK Society of CPA's, OK Bar Association
  - Est. Attendees: 300
- Thurs., Sept. 28, 2017 Cranberry Township, PA (F2F & V) **MAR**
  - Western PA Working Together
  - Topic: Private Debt Collection; E-Services Authentication Process; Practitioner Data Breaches; Don't Take the Bait (National Tax Security Summer Summit); Sharing Economy
  - Stakeholder: PA Society Tax Accounting Professionals, PICPA-Pittsburgh Chapter, PA Dept. of Revenue, PA-NATP, PA Society Enrolled Agents
  - Est. Attendees: 200
- Fri., Sept. 29, 2017 New Orleans, LA (V) **CEC**
  - Joint Practitioner Event with the Louisiana Department of Revenue
  - Topic: Future State; Practitioner Data Breaches
  - Stakeholder: Louisiana Department of Revenue
  - Est. Attendees: 75
- Fri., Sept. 29, 2017 Berea, KY (F2F) **CEC**
  - KY NATP Statewide Meeting
  - Topic: Don't Take the Bait (National Tax Security Summer Summit); Form 2290, Heavy Highway Vehicle Use Tax; Online Account Information for Balance Due; Passport Revocation or Denial; Private Debt Collection; Tax Scheme Awareness; Taxpayer Digital Communications (TDC); Practitioner Data Breaches
  - Stakeholders: KY NATP
  - Est. Attendees: 50
- Fri., Sept. 29, 2017 Augusta, ME (F2F) **MAR**
  - Maine Chapter of NATP 2017 Annual Education Workshop and Membership Meeting
  - Topic: Tax Professional Data Theft and Protection, Don't Take the Bait (National Tax Security Summer Summit), 2017 Fall Outreach; Issue Management Resolution System (IMRS)
  - Stakeholder: Maine Chapter NATP
  - Est. Attendees: 50



- Fri., Sept. 29, 2017 Edwardville, IL (F2F) **CEC**
  - Southern Illinois IRS Tax Symposium
  - Topic: Don't Take the Bait (National Tax Security Summer Summit); Form 2290, Heavy Highway Vehicle Use Tax; Online Account Information for Balance Due; Passport Revocation or Denial; Private Debt Collection; Tax Scheme Awareness; Taxpayer Digital Communications (TDC); Early Interaction Initiative - FTD Alerts; Identity Theft and Phishing; Practitioner Data Breaches
  - Stakeholder: Southern Illinois University SBDC
  - Est. Attendees: 125
- Fri., Sept. 29, 2017 Nationwide (V) **JHB for DG**
  - Event: Disaster Preparedness Month Webisode
  - Topic: IRS Disaster Assistance and Emergency Relief Program
  - Stakeholder: Nationwide Practitioners and Industry
  - Est. Attendees: 500 total for two sessions
- Sat., Sept. 30, 2017 Renton, WA (F2F) **KH**
  - Washington Small Business Fair
  - Topic: New Entrepreneurs Initiative
  - Stakeholders: Washington Small Business Fair Planning Committee
  - Est. Attendees: 350
- Sat., Sept. 30, 2017 Robinsonville, MS (V) **CANCELLED**
  - 2017 Southern Regional Tax Conference for Professional Tax Preparers
  - Topic: Office of Professional Responsibility
  - Stakeholders: Mississippi Practitioner Group
  - Est. Attendees: 200
- Sat., Sept. 30, 2017 Canyonville, OR (F2F) **KH**
  - Oregon Society of Tax Consultants Annual Convention
  - Topic: Private Debt Collection; 2016 Fall Outreach; 36B: Premium Tax Credit; 45R: Small Business HC Tax Credit; 5000A: Individual Shared Responsibility Provision; Correspondence Exams; Early Interaction Initiative - FTD Alerts; EITC Due Diligence; E-Services Authentication Process; Future State; Identity Theft and Phishing; ITIN Outreach - Path Act; Practitioner Data Breaches; Tax Security Awareness
  - Stakeholders: Oregon Society of Tax Consultants
  - Est. Attendees: 200

# **Communications and Liaison – Weekly Activity Report**

## **Week of October 10, 2017**

### **Internal Communications**

#### Headlines

- Review Outlook for missing archived items (PGLD)
- IRS improved in 96 percent of all Federal Employee Viewpoint Survey questions (HCO)
- Interim guidance applies records management rules to organizational mailboxes (PGLD)
- You may be eligible for early out or buy out in job swap offer through 10/31 (W&I)
- Missed the webinar on emotional resilience in the aftermath of the recent hurricanes? (HCO)
- Federal Group Life Insurance Open Season elections processed differently for hurricane-affected employees (HCO)

#### Leaders' Alert

- Ensure your employees are signed up for EEFax (IT)
- Learn how to create an inclusive workforce for persons with disabilities (EDI)
- Rate the correct position if your employee has held multiple jobs during the rating period (HCO)
- Design customized employee reports using the Human Resources Reporting Center (HCO)
- Don't modify workplace security features without approval (AWSS)

#### Poll Question

- How long have you had your current manager? (C&L)

#### Spotlight

- Innovation helps deaf drivers (National Disability Employment Month) (W&I)

#### Webbies

- Many IRS call centers are receiving improved technology (IT)

### **Media Relations**

#### Potential news releases for this week:

- Scams warning – top three scams
- ITINs/Refund Delays
- Injured/innocent spouse requests

#### Potential releases for coming weeks:

- Understanding the estimated tax penalty
- Check Your withholding
- IRS/Security Summit Partners: 2018 ID Theft Safeguards
- IRS launches re-designed Web site
- IRS offers one-stop resource center to new small businesses
- Pension limitations – cost of living adjustments
- Tax year 2017 inflation adjustments

### **National Public Liaison**

Wednesday, Oct. 11, 1 p.m. – Monthly Outreach Priorities conference call.

Tuesday, Oct. 17, 8:30 a.m. -- Commissioner Koskinen opens Security Summit meeting. Room 3313.

Tuesday Oct. 17, 12:30 p.m. – Commissioner Koskinen hosts Security Summit Roundtable with state revenue commissioners and representatives of the software, electronic payment and tax pro industries. Room 3313.

Thursday Oct. 19 – Commissioner Koskinen talks with attendees at the NPL monthly practitioner meeting.

### **Legislative Affairs**

Not IRS Agency Records



#### **UPCOMING HEARINGS:**

Currently, there are no hearings scheduled.

Not IRS Agency Records



### **Social Media**

WEB – Current front page

- Feature card: Educators' tax deduction (changing Wed. to VITA/TCE recruiting volunteers )
- Image card: Disaster Relief – remains to link, new image
- Non-image card: Oct. 16 Deadline
- ASL VIDEO: Volunteer recruitment;
  - changing Wed. to Products for Taxpayers Who Are Visually Impaired:  
<https://www.youtube.com/watch?v=r13aUkkghe4>)

- Embedded Tweet: [#IRS](#) filing extension due 10/16. Some in [#Michigan](#), [#WV](#) & affected by [#Harvey](#), [#Irma](#) & [#Maria](#) get more time. <http://go.usa.gov/xRh6x>
  - Changing Wed: Deadline, Spanish
  - Fri – Deadline, TaxPro

## TWITTER

### Topics include:

- Pinned: [#IRS](#) filing extension due 10/16. Some in [#Michigan](#), [#WV](#) & affected by [#Harvey](#), [#Irma](#) & [#Maria](#) get more time. <http://go.usa.gov/xRh6x>
- Oct 16 deadline
- Disaster Relief
- Drought relief
- Where's my amended return
- Volunteer for VITA/TCE
- Education Benefits
- Educators deduction
- Products for Taxpayers Who Are Visually Impaired
- #IRSTaxTips: biz reconstructing records, preparing for 2018 *\*New*
- Domestic Violence Awareness Month - [Tax Information for Survivors of Domestic Abuse](#) *\*Tentative*

## FB TABS

- Hot Topics: Let Us Help You
- Tax Scams: Tax Scams / Consumer Alerts *\*New image*
- ITIN Info
- YouTube
  - Current - Volunteer Income Tax Assistance Recruitment
  - Friday - Products for Taxpayers Who Are Visually Impaired
- Disaster Tax Relief
- Drought Relief *\*New*
- EO Select Check
- VITA volunteers *\*New*
- Security Summit
- Taxpayer Bill of Rights

## VIDEO TT FRIDAY

- Products for Taxpayers Who Are Visually Impaired:  
<https://www.youtube.com/watch?v=r13aUkkqhe4>

## Stakeholder Liaison Field

- Wed., Oct. 11, 2017 East Granby, CT(F2F) **MR**
  - IRS Resources for Small Business
  - Topics: Social Media, Small Business Taxes - The Virtual Workshop, Stakeholder Liaison How We Operate - Advantages of Partnering with IRS, IMRS, Tax Centers, 2017 Outreach, New Entrepreneurs, Tax Calendar Online
  - Stakeholder: Bradley Regional Chamber of Commerce
  - Est. Attendees: 35
  - Expected Outcome(s): Increased familiarity with free IRS tax resources and increased compliance

- Wed., Oct. 11, 2017 Oklahoma, OK (V) **CEC**
  - Oklahoma Bar Association Webcast
  - Topics: Don't Take the Bait (National Tax Security Summer Summit); Due Date for Information Return Statements W-2 and 1099-Misc (Box 7); ITIN Renewal Process; Online Account Information for Balance Due; Private Debt Collection; Tax Scheme Awareness; Taxpayer Digital Communications (TDC); Changes to OIC Policy; Collection User Fees; E-Services Authentication Process
  - Stakeholder: Oklahoma Bar Association
  - Est. Attendees: 25
- Thurs., Oct. 11, 2017 San Francisco, CA (F2F) **JHB for DG**
  - Oakland Small Business Forum
  - Topic: Don't Take the Bait, Employer Tax Withholding Responsibilities
  - Stakeholders: SBA San Francisco District Office
  - Est. Attendees: 25
  - Expected Outcome(s): SL expects SBA and their Resource Partners who attend the forum to share the information SL provides at the forum with their members/customers.
- Thurs., Oct. 12, 2017 Granby, CT (F2F) **MR**
  - Small Business Tax Responsibilities
  - Topics: Direct Pay; Future State; Identity Theft and Phishing; Leveraged SB Tax Workshops; New Entrepreneurs Initiative; Online Payment Agreements; Online Tax Calendar; Social Media
  - Stakeholder: Granby, CT Chamber of Commerce
  - Est. Attendees: 30
  - Expected Outcome(s): Increased familiarity with free IRS tax resources and increased compliance
- Thurs., Oct. 12, 2017 Hartford, CT (F2F) **MR**
  - Tax Planning and Reporting for Small Businesses
  - Topics: 2017 Fall Outreach; Direct Pay; Employer Tax Withholding Responsibilities; Independent Contractor or Employee; New Entrepreneurs Initiative; Payment Options; Sched. C Initiative; Small Business Recordkeeping
  - Stakeholder: Small Business Administration - CT (LEP)
  - Est. Attendees: 30
  - Expected Outcome(s): Increased familiarity with free IRS tax resources and increased compliance

## **Communications and Liaison – Weekly Activity Report**

### **Week of October 16, 2017**

#### **Internal Communications**

##### Employee Email

- Welcome back, Mayaguez and Charlotte Amalie employees (Commissioner msg to PR and VI employees) (Comm)

##### Headlines

- Protect yourself against the flu with a free vaccination (HCO)
- Tech Tip: Use email wisely (IT)
- Don't modify workplace security features without approval (AWSS)
- Leave available for bone marrow, organ donations (HCO)

##### Leaders' Alert

- Review your employees' telework agreements annually (HCO)
- Share your expertise, experiences in Knowledge Capture project (SBSE)
- Help available for writing performance commitments (HCO)

##### Poll Question

- What is Web Chat? (IT)

##### Spotlight

- Conflict happens (C&L)

##### Webbie

See how W&I C1000 team engages employees at second annual Diversity Days event (HCO)

#### **Media Relations**

##### Potential news releases for this week:

- IRS Nationwide Tax Forums -- seminars available online
- ITIN renewal reminder
- Security Summit update: 2018 ID theft safeguards
- Injured/innocent spouse requests
- Offshore Voluntary Compliance Initiative (OVCI) update
- Tax year 2017 inflation adjustments; tax benefit changes
- 2018 pension plan limitations

##### Potential releases for coming weeks:

- Understanding the estimated tax penalty
- Check your withholding
- IRS launches re-designed Web site

IRS offers one-stop resource center to new small businesses

#### **National Public Liaison**

Tuesday, Oct. 17, 8:30 a.m. -- Commissioner Koskinen opens Security Summit meeting. Room 3313.

Tuesday Oct. 17, 12:30 p.m. – Commissioner Koskinen hosts Security Summit Roundtable with state revenue commissioners and representatives of the software, electronic payment and tax pro industries. Room 3313.

Thursday Oct. 19 – Commissioner Koskinen talks with attendees at the NPL monthly practitioner meeting.

Wednesday, Oct. 25, 9 a.m. - 12 p.m.- IRPAC Public Meeting at the Melrose Hotel in DC.

### **Legislative Affairs**

Not IRS Agency Records



#### **UPCOMING HEARINGS:**

On Wednesday, October 25, 2017, a hearing is scheduled to be held before the Subcommittee on Government Operations and the Subcommittee on Healthcare, Benefits, and Administrative Rules, Committee on Oversight and Government Reform. The hearing is titled, "Ongoing Management Challenges at IRS." The hearing will

examine specific issues at IRS identified by the Treasury Inspector General for Tax Administration and other oversight bodies. These issues will include rehiring employees who were previously separated IRS for conduct or performance issues, information technology waste and mismanagement, and the most recent contract award to Equifax. The hearing is scheduled for 2:00 pm, in room 2154 of the Rayburn House Office Building.

Witnesses: Jeff Tribiano, Deputy Commissioner for Operations Support and Gina Garza, Chief Information Officer are scheduled to testify

## **UPCOMING DISTRICT CONGRESSIONAL LIAISON BRANCH MEETINGS:**

Currently, there are no District Congressional Liaison meetings scheduled.

## **Social Media**

WEB – Current front page

- Feature card: VITA/TCE recruiting volunteers (changing Wed. to)
- Image card: Disaster Relief – link remains, new image (fires)
- Non-image card: Oct. 16 Deadline (Tue change to Security Summit)
- SPANISH VIDEO: Products for Taxpayers Who Are Visually Impaired;
  - changing Tue. to: What to Do After a Tax Professional Data Compromise *\*New video*
- Embedded Tweet: [#IRS](#) extension due 10/16. Taxpayers affected by HURRICANES & [#WILDFIRES](#), and some in [#Michigan](#), [#WV](#) get more time.  
<https://go.usa.gov/xRh6x>
  - Changing Tue: ITINs
  - Changing Fri: Tax Forum online

TWITTER

### **Topics include:**

- Pinned: [#IRS](#) extension due 10/16. Taxpayers affected by HURRICANES & [#WILDFIRES](#), and some in [#Michigan](#), [#WV](#) get more time.  
<https://go.usa.gov/xRh6x> (changing Tue)
- ITIN
- Tax Forums online
- Tax Centers, Sharing economy
- Disaster Relief (including wildfires)
- Drought relief
- Volunteer for VITA/TCE
- Education Benefits
- Educators deduction
- Products for Taxpayers Who Are Visually Impaired
- [#IRSTaxTips](#): biz reconstructing records, preparing for 2018, Domestic Violence Awareness Month, Gifts to Charity

FB TABS

- Hot Topics: Let Us Help You
- Security Summit *(move up; new image)*
- Tax Scams: Tax Scams / Consumer Alerts
- ITIN Info



- YouTube
  - Current - Products for Taxpayers Who Are Visually Impaired
  - Wed - What to Do After a Tax Professional Data Compromise *\*New video*
- Disaster Tax Relief
- Drought Relief
- EO Select Check
- VITA volunteers
- Taxpayer Bill of Rights

#### VIDEO TT FRIDAY

- What to Do After a Tax Professional Data Compromise *\*New video*

### **Stakeholder Liaison Field**

- Mon. – Fri., Oct. 16-20, 2017 (F2F) **LB for KDW**
  - Locations: Reston, VA; Columbus, OH; Richmond, VA; Raleigh, NC; Detroit, MI; Albuquerque, NM; Florence, KY; San Diego, CA; Charlotte, NC; Newport Beach, CA; Nashville, TN; San Francisco, CA
  - APA Preparing for Year End
  - Topics: Payroll Professional Resources and Data Breach
  - Stakeholder: American Payroll Association
  - Est. Attendees: Varies depending on location
  - Expected Outcome(s): Information to be shared with other payroll personnel.
- Mon., Oct. 16, 2017 Sylva, NC, (F2F) **DY**
  - Small Business Industry Expo
  - Topics: Private Debt Collection; Tax Scheme Awareness; Identity Theft and Phishing
  - Stakeholder: Southwestern Community College
  - Est. Attendees: 75
  - Expected Outcome(s): Identification of new stakeholder partners and identification of workshops run by other organizations that IRS can leverage.
- Mon., Oct. 16, 2017 Hartford, CT (F2F) **MR**
  - Tax Planning and Reporting for Small Businesses
  - Topic: 2017 Fall Outreach; Employer Tax Withholding Responsibilities; Independent Contractor or Employee; New Entrepreneurs Initiative; Online Payment Agreements; Payment Options; Sched. C Initiative; Small Business Recordkeeping
  - Stakeholders: Small Business Administration - CT (LEP)
  - Est. Attendees: 30
  - Expected Outcome(s): Increased Small Business Compliance
- Tues., Oct. 17, 2017 Belmont, NC (F2F) **DY**
  - Federal & State Tax Issues
  - Topic: Payment Options and Other Online Tools; Private Debt Collection; Tax Scheme Awareness; Employer Tax Withholding Responsibilities; Independent Contractor or Employee; Social Media; Tax Security Awareness
  - Stakeholders: NC Department of Revenue & Gaston College

- Est. Attendees: 30
  - Expected Outcome(s): Opportunity to partner with the NC Dept of Revenue to communicate shared messages to shared audiences, and to leverage an educational institution in their tax education efforts.
- Tues., Oct. 17, 2017 Augusta, ME (V) **MR**
  - Venturing Forth – Business Planning for Entrepreneurs
  - Topics: Tax Centers
  - Stakeholder: New Ventures Maine-Maine Office/Central Area
  - Est. Attendees: 20
  - Expected Outcome(s): Increased Small Business Compliance
- Tues., Oct. 17, 2017 Mobile, AL (V) **SG for CEC**
  - Mid-South Area IMRS Updates for Tax Pros
  - Topics: Don't Take the Bait (National Tax Security Summer Summit); ITIN Renewal Process; Private Debt Collection; E-Services Authentication Process; Future State; Identity Theft and Phishing; Practitioner Data Breaches; Return Preparer Review Strategy
  - Stakeholder: Practitioner representatives from organizations in AL, AR, KY, LA, MS & TN.
  - Est. Attendees: 25
  - Expected Outcome(s): Provide information to be shared with practitioner organizations and gather feedback and issue from practitioners in attendance.
  - Media Relations Involvement: No media, only for practitioners.
  - Congressional Affairs Involvement: Eric Hall was provided with the information on this event.
- Tues., Oct. 17, 2017 Yuma, AZ (F2F) **VM for GT**
  - ASCPA Southwest Chapter Meeting & IRS Updates
  - Topics: Don't Take the Bait (National Tax Security Summer Summit); ITIN Renewal Process; Passport Revocation or Denial; Private Debt Collection; Tax Scheme Awareness; Taxpayer Digital Communications (TDC); Practitioner Priority Service
  - Stakeholder: Arizona Society of CPA's (ASCPA) - Southwest Chapter
  - Est. Attendees: 20
  - Expected Outcome(s): Increase practitioner awareness on topics to be presented. Opportunity to transition to statewide events.
  - Media Relations Involvement: Not an IRS event.
  - Congressional Affairs Involvement: Not an IRS event.
- Tues., Oct. 17, 2017 NY, NY (F2F) **MCP**
  - Relationship Management Visit – New Stakeholder Industry
  - With Director of Screen Actor Guild and accountant for entertainers
  - Demonstration of IRS key messages for entertainers, audit technique guide, audit processes, recordkeeping, identify issues of concerns within the industry, independent contractor vs. employee
  - Estimated Attendees: 4
  - Expected Outcome(s): looking at possible leveraged small business workshop, ways to communicate tax responsibilities through the many channels she can reach entertainers
- Wed., Oct. 18, 2017 Matthews, NC (F2F) **DY**
  - Identity Theft: Protect Yourself, Know the Steps

- Topics: Tax Scheme Awareness; Identity Theft and Phishing; Tax Security Awareness
- Stakeholder: Better Business Bureau - Charlotte, NC
- Est. Attendees: 40
- Expected Outcome(s): Leveraging an event by a BBB to communicate key security related messages to their membership. Also looking for an opportunity to leverage future events without any IRS staff attending (add to the Leveraged Small Business Tax Workshop Program).
  
- Wed., Oct. 18, 2017 NY, NH, and MA (V) **MCP**
  - IMRS Discussion Call
  - Topics: IMRS
  - Stakeholder: NYA IMRS Monthly Discussion Conference Members of our major practitioner organizations
  - Est. Attendees: 25
  - Expected Outcome(s): Feedback from community - discuss current issues, those raised last month, and new ones identified
  
- Wed., Oct. 18, 2017 Nationwide (V) **JHB for DG**
  - Understanding Tax Relief for Victims of Disasters
  - Topics: Disaster Assistance Relief
  - Stakeholder: Practitioners
  - Est. Attendees: 2,500
  - Expected Outcome(s): Share tax relief information and resources available for victims of disaster with tax practitioners, etc. so they are aware of, and can better help their clients, etc.
  - Media Relations Involvement: SL shared publicity flyer with the following: Michael Deneroff, NPL - e-News for Tax Pro's; Tanya Barbosa, NPL - Social Media; Eric Erickson, C&L Communications - Tax Tips; Karin Rice, W&I Public Affairs; Yadira Nadal, C&L Public Affairs - Media Relations.
  - Congressional Affairs Involvement: SL shared publicity flyer with Eric Hall, C&L District Congressional Liaison
  
- Wed., Oct. 18, 2017 Audubon, NJ (F2F) **MR**
  - 2017/2018 Updates
  - Topics: Don't Take the Bait (National Tax Security Summer Summit); Online Account Information for Balance Due; Private Debt Collection; Tax Scheme Awareness; Taxpayer Digital Communications (TDC); Automated Underreporter Program (AUR); Collection User Fees; Correspondence Exams; Direct Pay; Payment Options; Practitioner Data Breaches
  - Stakeholder: NJAPA - South Jersey West Chapter
  - Est. Attendees: 25
  - Expected Outcome(s): Making preparers more aware of scams and better prepared to avoiding them
  
- Wed., Oct. 18, 2017 East Peoria, IL (F2F) **SG for CEC**
  - Annual Meeting of the Illinois Chapter of the National Association of Tax Professionals
  - Topics: Changes to OIC Policy; Payment Options and Other Online Tools; Private Debt Collection; Collection User Fees; Direct Pay; Early Interaction Initiative - FTD Alerts; Online Payment Agreements; Payment Options
  - Stakeholder: Illinois Chapter of National Association of Tax Professionals
  - Est. Attendees: 10

- Expected Outcome(s): Information to be shared with all members of the Chapter. Also, to obtain feedback and gather issues from those in attendance.
- Wed., Oct. 18, 2017 Columbia, SC (V) **DY**
  - Annual Tax Committee Meeting
  - Topics: Don't Take the Bait (National Tax Security Summer Summit); Online Account Information for Balance Due; Private Debt Collection; Tax Scheme Awareness; Backup Withholding; Correspondence Exams; Practitioner Data Breaches; Tax Security Awareness
  - Stakeholder: SCACPA - South Carolina Association of Certified Public Accountants
  - Est. Attendees: 30
  - Expected Outcome(s): Secure feedback on key IRS programs and policies and issues being experienced by the tax practitioner community. This committee controls activities related to federal tax matters and influences communications to thousands of members that are CPAs.
- Wed., Oct. 18, 2017 Cherry Hill, NJ (V) **MR**
  - IMRS - Practitioner Systemic Procedural Virtual Meeting
  - Topics: Private Debt Collection; 2017 Tax Practitioner Institutes; Annual Filing Season Program; ITIN Outreach; Data Breach; E-Services Authentication Process; Information Reporting and Document Matching (IRDM); ITIN Outreach - Path Act; New Secure Access Process for Get Transcript; Office of Professional Responsibility (OPR); Online Payment Agreements; Practitioner Priority Service; Reporting abusive tax promotions and/or promoters; Return Preparer Review Strategy; Rules of Representation (RPO); Service Approach;
  - Stakeholder: American Institute of Certified Public Accountants
  - Est. Attendees: 25
  - Expected Outcome(s): Sharing of IMRS key messages and getting feedback on them from tax pros
- Wed., Oct. 18, 2017 Birmingham, AL (V) **SG for CEC**
  - Alabama Fall Practitioner Liaison Meeting
  - Topics: ITIN Renewal Process; ITIN Outreach - Path Act; Practitioner Data Breaches; Sharing Economy
  - Stakeholder: IRS - Alabama Stakeholder Liaison
  - Est. Attendees: 30
  - Expected Outcome(s): Information will be shared with all members, obtain feedback and gather issues from those in attendance.
  - Congressional Affairs Involvement: Eric Hall was provided the information on this event.
  -
- Wed., Oct. 18, 2017 Omaha, NE (F2F) **SG for CEC**
  - Practitioner Liaison Meeting
  - Topics: Automated Underreporter Program (AUR); Changes to OIC Policy; Correspondence Exams
  - Stakeholder: Nebraska Society of Independent Accountants, Nebraska Society of CPAs, Nebraska Bar Association, Accounting & Financial Women's Association, Auditing and Governmental Accounting, H&R Block
  - Est. Attendees: 25
  - Expected Outcome(s): Information will be shared with all members, obtain feedback and gather issues from those in attendance.

- Media Relations Involvement: No media, only for practitioners.
- Congressional Affairs Involvement: Eric Hall was provided the information on this event.
- Thurs., Oct. 19, 2017 Dix Hills, NY (F2F) **MCP**
  - Relationship Management Visit – New Stakeholder Industry
  - With Director of Dix Hill Five Town College. Five Town is a performance school.
  - Demonstration of IRS key messages for entertainers, independent contractor vs. employee
  - Estimated Attendees: 4
  - Expected Outcome(s): to secure leveraged small business workshop and have them carry tax material in their curriculum
- Thurs., Oct. 19, 2017 Sacramento, CA (F2F) **JHB for DG**
  - Business Success Forums
  - Topics: Online Account Information for Balance Due; Identity Theft and Phishing; ITIN Outreach - Path Act
  - Stakeholder: Women's Business Center - California Capital Development Corporation
  - Est. Attendees: 75
  - Expected Outcome(s): This event's location allows SL to reach and share IRS key messages with a large LEP community and SL expects to arrange a meeting with industry leaders and the Spanish Small Business Office.
  - Media Relations Involvement: N/A
  - Congressional Affairs Involvement: N/A. (SL notes they will share information about this event with IRS' District Congressional Liaison Branch).
- Thurs., Oct. 19, 2017 Nationwide (V) **JHB for DG**
  - Understanding Tax Relief for Victims of Disasters
  - Topics: Disaster Assistance Relief
  - Stakeholder: Practitioners
  - Est. Attendees: 2,500
  - Expected Outcome(s): Share tax relief information and resources available for victims of disaster with tax practitioners, etc. so they are aware of, and can better help their clients, etc.
  - Media Relations Involvement: SL shared publicity flyer with the following: Michael Deneroff, NPL - e-News for Tax Pro's; Tanya Barbosa, NPL - Social Media; Eric Erickson, C&L Communications - Tax Tips; Karin Rice, W&I Public Affairs; Yadira Nadal, C&L Public Affairs - Media Relations.
  - Congressional Affairs Involvement: SL shared publicity flyer with Eric Hall, C&L District Congressional Liaison
- Thurs., Oct. 19, 2017 Imperial, CA (F2F) **JHB for DG**
  - Annual Imperial Valley Employer Advisory Council Fall Seminar
  - Topics: Don't Take the Bait (National Tax Security Summer Summit); Practitioner Data Breaches
  - Stakeholder: Imperial Valley Employer Advisory Council
  - Est. Attendees: 30
  - Expected Outcome(s): SL will reach tax and payroll professionals in a geographically underserved area and share IRS key messages on Data Breaches and the "Don't Take the Bait" initiative.
  - Media Relations Involvement: N/A

- Congressional Affairs Involvement: N/A
- Thurs., Oct. 19, 2017 Golden, CO (F2F) **KH**
  - Regional Payroll Conference
  - Topics: Payroll Professional Resources and Data Breach
  - Stakeholder: Denver Chapter APA
  - Est. Attendees: 125
  - Expected Outcome(s): Share W-2 Breach information with payroll practitioners from 6 states
  - Media Relations Involvement: N/A
  - Congressional Affairs Involvement: N/A
- Thurs., Oct. 19, 2017 Augusta, ME (F2F) **MR**
  - Maine Tax Practitioner Institute
  - Topics: 2017 Tax Practitioner Institutes; Practitioner Data Breaches
  - Stakeholder: Maine SCORE
  - Est. Attendees: 115
  - Expected Outcome(s): Secure feedback on key IRS programs and policies and issues being experienced by the tax practitioner community.
  - Media Relations Involvement: NA
  - Congressional Affairs Involvement: NA
- Thurs., Oct. 19, 2017 Binghampton, NY (F2F) **MCP**
  - NYSSCPA Southern Tier Annual Tax Conference
  - Topics: 2017 Fall Outreach
  - Stakeholder: NYSSCPA Southern Tier Chapter
  - Est. Attendees: 80
  - Expected Outcome(s): provide participants an update on current taxation developments
  - Media Relations Involvement: No, not an IRS sponsored event
  - Congressional Affairs Involvement: No
- Thurs., Oct. 19, 2017 Washington D.C. (F2F) **DY**
  - Southeast Regional Bar Liaison Meeting
  - Topics: IRS Executives Key Messages
  - Stakeholder: Southeast Regional Bar Association
  - Est. Attendees: 24
  - Expected Outcome(s): A group that regularly provides valuable feedback to IRS on programs and policies. Key IRS leaders will be attending the event. Attendees represent some 13 bar associations across the east coast and are used to leverage information out to their membership.
- Thurs., Oct. 19, 2017 Overland Park, KS (V) **SG for CEC**
  - Kansas & Missouri Stakeholder Relationship Management Local Council Meetings (SRMLC)
  - Topics: Due Date for Information Return Statements W-2 and 1099-Misc (Box 7); Online Account Information for Balance Due; Taxpayer Digital Communications (TDC); Practitioner Data Breaches
  - Stakeholder: SRMLC Group - Kansas and Missouri
  - Est. Attendees: 45
  - Expected Outcome(s): Information sharing among IRS business units.
- Fri., Oct. 20, 2017 Southgate, CA (F2F) **JHB for DG**
  - Southgate Chamber 2017 Seminars

- Topics: Taxpayer Digital Communications (TDC); Payment Options; Private Debt Collection
- Stakeholder: Southgate Chamber of Commerce
- Est. Attendees: 25
- Expected Outcome(s): SL will hold a workshop on 'virtual interactions with the IRS' and will gather feedback and issues the Chambers' leaders and Southgate Resource Center representatives are hearing from business owners.
- Media Relations Involvement: N/A
- Congressional Affairs Involvement: N/A
  
- Fri., Oct. 20, 2017 Birmingham, AL (F2F) **SG for CEC**
  - 2017 Statewide Conference
  - Topics: Sharing Economy
  - Stakeholder: Birmingham Payroll Association
  - Est. Attendees: 75
  - Expected Outcome(s): Provide information to payroll professionals in attendance.
  
- Fri., Oct. 20, 2017 Greensboro, NC (V) **DY**
  - The Annual North Carolina Society of Accountants (NCSA) and North Carolina Society of Enrolled Agents (NCSEA) Practitioner Liaison Meeting
  - Topics: Private Debt Collection; Direct Pay; Identity Theft and Phishing; New Secure Access Process for Get Transcript; Payment Options; Practitioner Data Breaches; Social Media;
  - Stakeholder: NC Society of Accountants (NCSA)
  - Est. Attendees: 65
  - Expected Outcome(s): Leveraging two large practitioner groups to communicate key messages to membership as well as to provide feedback on IRS programs and policies.
  - Media Relations Involvement: None
  - Congressional Affairs Involvement: None

## **Communications and Liaison – Weekly Activity Report**

### **Week of October 23, 2017**

#### **Internal Communications**

##### Headlines

- Volunteer to prepare taxes for those in need (W&I)
- Talking politics? Know what the Hatch Act permits and prohibits (HCO)
- Unlock your SETR account yourself in a few simple steps (HCO)
- Check your beneficiary designations to ensure they're current (HCO)

##### Leaders' Alert

- Cancelling sign language interpreting and translation services (EDI)
- Remind your employees of Hatch Act prohibitions (HCO)
- Register for Treasury Executive Institute's fall leadership training (HCO)

##### Poll Question

- If you need benefits or retirement help, whom do you contact? (HCO)

##### Spotlight

- Balancing Act (National Work and Family Month) C&L

##### Webbie

- Are you a non-enforcement pocket commission holder? (AWSS)
- Veterans Mentoring Program offers valuable resources to IRS veterans (HCO)

#### **Media Relations**

##### Potential news releases for this week:

- ITIN renewal/refund hold reminder
- Offshore Voluntary Compliance Initiative (OVCI) update
- PTIN renewals/applications for 2018
- Understanding the estimated tax penalty
- Check your withholding
- IRPAC annual report

##### Potential releases for coming weeks:

- IRS launches re-designed Web site
- IRS offers one-stop resource center to new small businesses

#### **National Public Liaison**

Wed., Oct. 25 - Information Reporting Practitioner Advisory Council (IRPAC) at the Melrose Georgetown.

Wed. Nov. 1 and Thu. Nov. 2 – Electronic Tax Administration Advisory Committee (ETAAC) working session. IRS Headquarters.

Thu., Nov. 2 - Payroll Industry Call

Tue., Nov. 7 - Reporting Agent Forum (RAF) in NCFB. (usually two days; only one day this time)

#### **Legislative Affairs**



**UPCOMING HEARINGS:**

On Wednesday, October 25, 2017, a hearing is scheduled to be held before the Subcommittee on Government Operations and the Subcommittee on Healthcare, Benefits, and Administrative Rules, Committee on Oversight and Government Reform. The hearing is titled, "Ongoing Management Challenges at IRS." The hearing will examine specific issues at IRS identified by the Treasury Inspector General for Tax Administration and other oversight bodies. These issues will include rehiring employees who were previously separated IRS for conduct or performance issues, information technology waste and mismanagement, and the most recent contract award to Equifax.

The hearing is scheduled for 2:00 pm, in room 2154 of the Rayburn House Office Building.

Witnesses: Jeff Tribiano, Deputy Commissioner for Operations Support and Gina Garza, Chief Information Officer are scheduled to testify

**UPCOMING DISTRICT CONGRESSIONAL LIAISON BRANCH MEETINGS:**

Currently, there are no District Congressional Liaison meetings scheduled.

**Social Media**

WEB – Current front page

- Feature card: Scams reminder (changing Wed.)
- Image card: Disaster Relief
- Non-image card: Security Summit

- VIDEO: What to Do After a Tax Professional Data Compromise
  - changing Tue. to: Individual Taxpayer Identification Number (ITIN)
- Embedded Tweet: [#IRS](#) announced today adjustments to pension plans & [#retirement](#) limitations for 2018. <https://go.usa.gov/xnrMA>
  - Changing Tue: Tax Forum online
  - Changing Fri: Charity scams (*unless other issues emerge*)

#### TWITTER

- Pinned: [#IRS](#), [#SecuritySummit](#) are protecting you from identity thieves & cybercriminals. Check <http://www.irs.gov/securitysummit> . (changing Tue)
- ITIN
- Tax Forums online
- Protect Your Clients (cards)
- PTIN renewals/applications for 2018 *\*new*
- Check your withholding *\*new*
- Scams
- Volunteer for VITA/TCE
- #IRSTaxTips
- Tax Centers, Sharing economy
- Disaster Relief (including wildfires) *\*potentially new*
- Charity scams *\*potential*
- Estimated taxes *\*potential*
- Offshore Voluntary Compliance Initiative (OVCI) update *\*potential*

#### FB TABS

- Security Summit
- Protect Your Clients (*change card*)
- Tax Scams: Tax Scams / Consumer Alerts
- ITIN Info
- YouTube
  - Current - What to Do After a Tax Professional Data Compromise *\*New video*
  - Wed - Individual Taxpayer Identification Number (ITIN)
- Disaster Tax Relief
- Drought Relief
- Charity scams *\*new*
- VITA volunteers
- Taxpayer Bill of Rights

#### VIDEO TT FRIDAY

- Individual Taxpayer Identification Number (ITIN)

#### Stakeholder Liaison

- Mon. – Fri., Oct. 23-27, 2017 (F2F) **MAR – LB for KDW**
  - Locations: Minneapolis, MN; Salt Lake City, UT; Atlanta, GA; Cerritos, CA; Northbrook, IL; Houston, TX; San Antonio, TX; San Jose, CA; Philadelphia, PA; Portland, OR; Arlington, TX; Pittsburgh, PA; Cleveland, OH; Denver, CO

- APA Preparing for Year End
  - Topics: "Don't Take the Bait", W-2 Verification Code updates and IRS Resources for Payroll Professionals
  - Stakeholder: American Payroll Association
  - Est. Attendees: Varies depending on location
  - Expected Outcome(s): Make payroll professionals better aware of the W-2 schemes so as to avoid them; Information to be shared with other payroll personnel.
  - Media Relations Involvement: Worked out of HQ, No Media.
  - Congressional Affairs Involvement: N/A
- **Mon., Oct. 23, 2017 Portland, OR (F2F) KH**
    - IRS/Practitioners Forum
    - Topics: Changes to OIC Policy; Correspondence Exams; Field Audit Process; Practitioners Filing Accurate EITC and Refundable Credits Returns; Private Debt Collection; Tax Scheme Awareness; Taxpayer Digital Communications (TDC); 2017 Fall Outreach; E-Services Authentication Process; W-2 & 1099-MISC for 2017; Payment Options; Practitioner Data Breaches; Refundable Credits, Due Diligence
    - Stakeholder: Oregon Society of CPAs; Oregon Society of Enrolled Agents; Oregon bar Association; Oregon Society of Tax Consultants; Oregon Association of Independent Accountants; Oregon Association of Tax Consultants.
    - Est. Attendees: 250
    - Expected Outcome(s): additional feedback on revised IRS.gov and problems with search, late return of eServices, data breach queries
    - Media Relations Involvement: none
    - Congressional Affairs Involvement: none
- **Mon., Oct. 23, 2017 Saratoga Springs, NY (F2F) MCP**
    - NYSSEA Annual Conference - 30th Anniversary, two-day event
    - Topic: Don't Take the Bait (National Tax Security Summer Summit); Form 2290, Heavy Highway Vehicle Use Tax; Online Account Information for Balance Due; 2017 Fall Outreach; Identity Theft and Phishing
    - Stakeholders: NYSSEA New York State Society of Enrolled Agents
    - Est. Attendees: 100
    - Expected Outcome(s): Opportunity for this group of EAs to discuss issues that affect the EA community as well as providing service-wide key messages and outreach priorities
    - Media Relations Involvement: none
    - Congressional Affairs Involvement: none
- **Tues., Oct. 23, 2017 Wilkes Barre, PA (F2F) MAR**
    - PA Tax Institutes Federal Income Tax Seminar
    - Topic: "Don't Take the Bait"; Understand IRS private debt collection; Understand NRP Audits; Uses of IRS audit technique guide; Recognize and protect against ID theft; Use IRS e-Services tools; Discuss current status of IRS; Understand current-status of PTIN system
    - Stakeholders: Pennsylvania Tax Institutes
    - Est. Attendees: 50
    - Expected Outcome(s): Share IRS priority messages, identify issues, help tax pros to avoid data thefts and gather feedback from participants,
    - Media Relations Involvement: N/A

- Congressional Affairs Involvement: N/A
- **Tues., Oct. 24, 2017 Tulare, CA (F2F) KD for DG**
  - Tulare Business Symposium
  - Topics: Due Date for Information Return Statements W-2 and 1099-Misc (Box 7); Form 2290, Heavy Highway Vehicle Use Tax; Online Account Information for Balance Due; Private Debt Collection; Identity Theft and Phishing
  - Stakeholder: California State Board of Equalization (BOE)
  - Est. Attendees: 200
  - Expected Outcome(s): Share OID messages, identify issues and gather feedback from SBF participants, which include small business organizations and state and local government representatives.
  - Media Relations Involvement: N/A
  - Congressional Affairs Involvement: N/A
- **Tues., Oct. 24, 2017 Beverly Hills, CA (F2F) KD for DG**
  - 33rd Annual UCLA Tax Controversy Institute
  - Topics: Practitioner Data Breaches
  - Stakeholder: UCLA Tax Controversy Institute
  - Est. Attendees: 300
  - Expected Outcome(s): Inform attending CPAs and attorneys of the high potential for data theft in the practitioner community, identify issues and gather practitioner feedback.
  - Media Relations Involvement: N/A
  - Congressional Affairs Involvement: N/A
- **Tues., Oct. 24, 2017 Paramus, NJ (F2F) MAR**
  - Annual Federal State Tax Workshop
  - Topics: 2017 Tax Law Updates, "Don't Take the Bait", Data Compromises – A Tax Professionals Nightmare, IRS Future State, Understanding Collection, Working the IRS – Expect in Examination Appeals
  - Stakeholder: New Jersey Association of Public Accountants
  - Est. Attendees: 100
  - Expected Outcome(s): Share IRS priority messages, identify issues, help tax pros to avoid data thefts and gather feedback from participants,
  - Media Relations Involvement: N/A
  - Congressional Affairs Involvement: N/A
- **Tues., Oct. 24, 2017 Brewer, ME (F2F) MAR**
  - Maine Tax Practitioner Institute
  - Topic: "Don't Take the Bait"; Understand IRS private debt collection; Understand NRP Audits; Uses of IRS audit technique guide; Recognize and protect against ID theft; Use IRS e-Services tools; Discuss current status of IRS; Understand current-status of PTIN system
  - Stakeholder: Maine SCORE
  - Est. Attendees: 105
  - Expected Outcome(s): Share IRS priority messages, identify issues, help tax pros to avoid data thefts and gather feedback from participants,
  - Media Relations Involvement: N/A
  - Congressional Affairs Involvement: N/A

- **Tues., Oct. 24, 2017 Columbia, SC (F2F) **DY****
  - South Carolina Tax Council Fall Event
  - Topics: Tax Scheme Awareness; Changes to OIC Policy; Collection User Fees; Identity Theft and Phishing; Payment Options; Tax Security Awareness
  - Stakeholder: South Carolina Tax Council
  - Est. Attendees: 150
  - Expected Outcome(s): Sharing of key messages and the securing of feedback on IRS programs and services.
  - Media Relations Involvement: None
  - Congressional Affairs Involvement: None
- **Tues., Oct. 24, 2017 Fayetteville, AR (F2F) **SG for CEC****
  - 2017 Tax Professional Seminar: Auburn
  - Topics: Practitioner Data Breaches
  - Stakeholder: Auburn University Outreach
  - Est. Attendees: 150
  - Expected Outcome(s): Provide information to be shared with practitioners in attendance with the expectation that it is shared with their colleagues and clients. Also, to gather feedback and issues from practitioners in attendance.
  - Media Relations Involvement: None
  - Congressional Affairs Involvement: None
- **Tues., Oct. 24, 2017 Kulpville, PA (F2F) **MAR****
  - PA Tax Institutes Federal Income Tax Seminars
  - Topic: "Don't Take the Bait"; Understand IRS private debt collection; Understand NRP Audits; Uses of IRS audit technique guide; Recognize and protect against ID theft; Use IRS e-Services tools; Discuss current status of IRS; Understand current-status of PTIN system
  - Stakeholder: Pennsylvania Tax Institutes
  - Est. Attendees: 75
  - Expected Outcome(s): Share IRS priority messages, identify issues, help tax pros to avoid data thefts and gather feedback from participants,
  - Media Relations Involvement: N/A
  - Congressional Affairs Involvement: N/A
- **Tues., Oct. 24, 2017 Brentwood, NY (F2F) **MCP****
  - Relationship Management Visit – Industry
  - Topics: Will demonstrate the navigations of IRS.gov, highlight the SBWS, ITIN, on-line payment tools, Field Audit Process, Leveraged SB Tax Workshops, New Entrepreneurs Initiative, Tax Security Awareness
  - Stakeholder: Directors of BOCES of Suffolk County for 51 locations
  - Est. Attendees: 85
  - Expected Outcome(s): to include IRS workshop materials in upcoming curriculum
  - Media Relations Involvement: none
  - Congressional Affairs Involvement: none
- **Wed., Oct. 25, 2017 Brooklyn, NY (V) **MCP****
  - New York State Small Business Development Center (NYSSBDC)
  - Topics: Identity Theft and Phishing
  - Stakeholder: business counselors, staff and directors of 24 regional NY SBDCs
  - Est. Attendees: 50

- Expected Outcome(s): meeting with counselors in 24 locations so they can in turn assist small business clients avoid identify theft and phishing
- Media Relations Involvement: none
- Congressional Affairs Involvement: none
  
- **Wed., Oct. 25, 2017 Columbus, OH (V) LB for KDW**
  - Ohio Stakeholder Relationship Management Local Council Meetings (SRMLC)
  - Topics: Current BOD initiatives and programs
  - Stakeholder: Business Units: Collection, Exam, CI, Appeals, Taxpayer Advocate Service, GL, LBI, NTEU, SPEC, W&I-TAC, Counsel, and TEGE
  - Est. Attendees: 13
  - Expected Outcome(s): Share IRS key message with internal stakeholders
  - Media Relations Involvement: None required internal BOD Meeting
  - Congressional Affairs Involvement: None required internal meeting
  
- **Wed., Oct. 25, 2017 Minneapolis, MN (F2F) LB for KDW**
  - University of Minnesota-Income Tax Short Course
  - Topics: Don't Take the Bait (National Tax Security Summer Summit); Due Date for Information Return Statements W-2 and 1099-Misc (Box 7); Private Debt Collection; Tax Scheme Awareness; 2017 Tax Practitioner Institutes; Identity Theft and Phishing
  - Stakeholder: Minnesota Department of Revenue & Univ. of Minnesota
  - Est. Attendees: 105
  - Expected Outcome(s): Share IRS priority messages, identify issues, help tax pros to avoid data thefts and gather feedback from participants,
  - Media Relations Involvement: N/A
  - Congressional Affairs Involvement: N/A
  
- **Wed., Oct. 25, 2017 Reading, PA (F2F) MAR**
  - PA Tax Institutes Federal Income Tax Seminars
  - Topic: "Don't Take the Bait"; Understand IRS private debt collection; Understand NRP Audits; Uses of IRS audit technique guide; Recognize and protect against ID theft; Use IRS e-Services tools; Discuss current status of IRS; Understand current-status of PTIN system
  - Stakeholder: Pennsylvania Tax Institutes
  - Est. Attendees: 75
  - Expected Outcome(s): Share IRS priority messages, identify issues, help tax pros to avoid data thefts and gather feedback from participants,
  - Media Relations Involvement: N/A
  - Congressional Affairs Involvement: N/A
  
- **Thurs., Oct. 26, 2017 St. Fresno, CA (V) KD for DG**
  - Western Area's IMRS Monthly Call
  - Topics: Current Issues on IMRS and any issues submitted by attendees.
  - Stakeholders: CSEA East Bay Chapter, Mission Society of Enrolled Agents, CalCPA Inland Empire Chapter, CalCPA Orange County - Long Beach Chapter and Los Angeles Chapter
  - Est. Attendees: 15
  - Expected Outcome(s): Provide updates on issues elevated by Western area to IMRS, information on latest IMRS reports posted on IRS.gov, and solicit any new IMRS issues.

- Media Relations Involvement: N/A
- Congressional Affairs Involvement: N/A
- Thurs., Oct. 26, 2017 Sturbridge, MA (F2F) **MCP**
  - 15th Annual New England Enrolled Agent Conference, three days
  - Topics: Identity Theft and Phishing; Practitioner Data Breaches
  - Stakeholder: Massachusetts Society of Enrolled Agents
  - Est. Attendees: 85
  - Expected Outcome(s): Providing tax updates to enrolled agents on IRS pressing topics
  - Media Relations Involvement: none
  - Congressional Affairs Involvement: none
- Thurs., Oct. 26, 2017 Costa Mesa, CA (F2F) **KD for DG**
  - Annual CalCPA Fall Seminar Series
  - Topics: Private Debt Collection; Future State; Practitioner Data Breaches
  - Stakeholder: CalCPA Chapter Orange County Long Beach
  - Est. Attendees: 100
  - Expected Outcome(s): SL will solicit feedback from CPAs and identify issues from OID topics discussed.
  - Media Relations Involvement: N/A
  - Congressional Affairs Involvement: N/A
- Thurs., Oct. 26, 2017 Aurora, CO (F2F & V) **KH**
  - Fall IRS Tax Updates
  - Topics: Practitioner Data Breaches; Taxpayer Burden Reduction
  - Stakeholder: Mile-Hi Chapter of Public Accountants
  - Est. Attendees: 150
  - Expected Outcome(s): feedback on the IRS.gov revisions, eServices, data breaches
  - Media Relations Involvement: none
  - Congressional Affairs Involvement:
- Thurs., Oct. 26, 2017 Richmond, VA (F2F) **DY**
  - IRS Key Issues
  - Topics: Don't Take the Bait (National Tax Security Summer Summit); Private Debt Collection; Tax Scheme Awareness; Taxpayer Digital Communications; Automated Underreporter Program; Correspondence Exams; Identity Theft and Phishing; Payment Options; Practitioner Data Breaches; Work Opportunity Tax Credits
  - Stakeholder: Virginia Society of Enrolled Agents (State Chapter)
  - Est. Attendees: 100
  - Expected Outcome(s): Sharing of IRS key messages and the securing of feedback on IRS programs and services.
  - Media Relations Involvement: None
  - Congressional Affairs Involvement: None
- Thurs., Oct. 26, 2017 Malvern, PA (F2F) **MAR**
  - Main Line Continuing Education Society: IRS Annual Updates
  - Topics: Don't Take the Bait (National Tax Security Summer Summit); Due Date for Information Return Statements W-2 and 1099-Misc (Box 7); Form 2290, Heavy Highway Vehicle Use Tax; Online Account Information for Balance Due; Passport

- Revocation or Denial; Private Debt Collection; Tax Scheme Awareness; Taxpayer Digital Communications; 2017 Fall Outreach; Identity Theft and Phishing; Practitioner Data Breaches
  - Stakeholder: Main Line Association for Continuing Education
  - Est. Attendees: 110
  - Expected Outcome(s): Share IRS priority messages, identify issues, help tax pros to avoid data thefts and gather feedback from participants,
  - Media Relations Involvement: N/A
  - Congressional Affairs Involvement: N/A
- Thurs., Oct. 26, 2017 Portland, ME (F2F) **MAR**
  - Maine Tax Practitioner Institute
  - Topic: "Don't Take the Bait"; Understand IRS private debt collection; Understand NRP Audits; Uses of IRS audit technique guide; Recognize and protect against ID theft; Use IRS e-Services tools; Discuss current status of IRS; Understand current-status of PTIN system
  - Stakeholder: Maine SCORE
  - Est. Attendees: 125
  - Expected Outcome(s): Share IRS priority messages, identify issues, help tax pros to avoid data thefts and gather feedback from participants,
  - Media Relations Involvement: N/A
  - Congressional Affairs Involvement: N/A
- Thurs., Oct. 26, 2017 Concord, NH (F2F) **MCP**
  - New Hampshire NATP Fall Seminar and Annual Meeting, all day event
  - Topics: E-Services Authentication Process; Identity Theft and Phishing; Practitioner Data Breaches
  - Stakeholder: National Assoc. of Tax Professionals, New Hampshire Chapter
  - Est. Attendees: 100
  - Expected Outcome(s): education to a large group of EAs on what to do to avoid or if have a data theft and gather their feedback
  - Media Relations Involvement: none
  - Congressional Affairs Involvement: none
- Thurs., Oct. 26, 2017 Knoxville, TN (F2F) **SG for CEC**
  - Singleton B. Wolfe Memorial Federal Tax Conference
  - Topics: Private Debt Collection; E-Services Authentication Process; Future State; Identity Theft and Phishing; Practitioner Data Breaches
  - Stakeholder: University of Tennessee and the Federal Tax Conference Advisory Board
  - Est. Attendees: 80
  - Expected Outcome(s): Provide information to be shared with practitioners in attendance with the expectation that it is shared with their colleagues and clients. Also, to gather feedback and issues from practitioners in attendance.
  - Media Relations Involvement: None
  - Congressional Affairs Involvement: None
- Thurs., Oct. 26, 2017 Houston, TX (F2F) **VM for GT**
  - Texas Chapter of NATP Houston Space Connection Annual CPE
  - Topics: Tax Scheme Awareness; Practitioner Data Breaches



- Stakeholder: NATP
- Est. Attendees: 60
- Expected Outcome(s): Increase practitioner's awareness of tax schemes and practitioner data breaches.
- Media Relations Involvement: Not an IRS event
- Congressional Affairs Involvement: Not an IRS event
  
- Thurs., Oct. 26, 2017 Brooklyn, NY (V) **MCP**
  - Downstate New York Tax Practitioner's Liaison Bi-Annual Meeting
  - Topics: Program Updates from Field Collection & Exam, TAS, TAP, CI, and Appeals
  - Stakeholder: Enrolled Agents, CPA & Attorney tax professionals from various professional organizations including but not limited to the New York chapters of NYSSEA, NYSSCPA, NATP, NCCPAP, NYSIA, NY County Lawyers Association, Nassau & Suffolk Bar and CPA Associations Tax Committee sections, AAA-CPA
  - Est. Attendees: 50
  - Expected Outcome(s): meeting provides a platform for cross-dialogue between the IRS and the tax practitioner community. IRS representatives from C&L-Stakeholder Liaison, TAS, Collection, Exam, Appeals, CI and WI will provide programs updates from their respective business units before a roundtable gathering of Chapter Presidents, Tax Committee heads and Directors of various practitioner organizations.
  - Media Relations Involvement: none
  - Congressional Affairs Involvement: none
  
- Thurs., Oct. 26, 2017 Glendale, CA (F2F) **KD for DG**
  - Metro Los Angeles Practitioner Liaison Meeting
  - Topics: Don't Take the Bait (National Tax Security Summer Summit); Online Account Information for Balance Due; Private Debt Collection; Tax Scheme Awareness; Taxpayer Digital Communications; EITC Due Diligence; Field Audit Process; Identity Theft and Phishing; ITIN Outreach - Path Act
  - Stakeholder: CalCPA, CSEA, CSTC Chapters, Los Angeles Bar Association
  - Est. Attendees: 50
  - Expected Outcome(s): Generate dialogue between the practitioners and IRS to identify any systemic issues that SL can work through IMRS. SL also expects information presented at the PLM to be shared with attending organizations' memberships.
  - Media Relations Involvement: N/A
  - Congressional Affairs Involvement: N/A
  
- Thurs., Oct. 26, 2017 Lancaster, PA (F2F) **MAR**
  - Tax Practitioner Institutes
  - Topic: "Don't Take the Bait"; Understand IRS private debt collection; Understand NRP Audits; Uses of IRS audit technique guide; Recognize and protect against ID theft; Use IRS e-Services tools; Discuss current status of IRS; Understand current-status of PTIN system
  - Stakeholder: Pennsylvania Tax Institutes
  - Est. Attendees: 100
  - Expected Outcome(s): Share IRS priority messages, identify issues, help tax pros to avoid data thefts and gather feedback from participants,
  - Media Relations Involvement: N/A
  - Congressional Affairs Involvement: N/A

- Fri., Oct. 27, 2017 Oklahoma, OK (F2F) **SG for CEC**
  - 2017 Oklahoma Society of Enrolled Agents Annual Seminar
  - Topics: Due Date for Information Return Statements W-2 and 1099-Misc (Box 7); ITIN Renewal Process; Online Account Information for Balance Due; Private Debt Collection; Tax Scheme Awareness; Taxpayer Digital Communications (TDC); Changes to OIC Policy; Correspondence Exams; E-Services Authentication Process; Practitioner Data Breaches; Sharing Economy
  - Stakeholder: Oklahoma Society of Enrolled Agents - State Organization
  - Est. Attendees: 100
  - Expected Outcome(s): Provide information to be shared with practitioners in attendance with the expectation that it is shared with their colleagues and clients. Also, to gather feedback and issues from practitioners in attendance.
  - Media Relations Involvement: None
  - Congressional Affairs Involvement: None
  
- Fri., Oct. 27, 2017 King of Prussia, PA (F2F) **MAR**
  - Institute of Management Accountants (Mid-Atlantic Council) Fall Continuing Education Seminar
  - Topics: Don't Take the Bait (National Tax Security Summer Summit); Due Date for Information Return Statements W-2 and 1099-Misc (Box 7); Online Account Information for Balance Due; Passport Revocation or Denial; Private Debt Collection; 2017 Tax Practitioner Institutes; Identity Theft and Phishing; Practitioner Data Breaches
  - Stakeholder: Institute of Management Accountants (Mid-Atlantic Council)
  - Est. Attendees: 50
  - Expected Outcome(s): Share IRS priority messages, identify issues, help tax pros to avoid data thefts and gather feedback from participants,
  - Media Relations Involvement: N/A
  - Congressional Affairs Involvement: N/A
  
- Fri., Oct. 27, 2017 Little Rock, AR (F2F) **SG for CEC**
  - 2017 Tax Professional Seminar: Auburn
  - Topics: CAF - Third Party Authorizations; Foreign Bank and Financial Accounts (FBAR); Future State; Refund Fraud/ID Theft
  - Stakeholder: Auburn University Outreach
  - Est. Attendees: 150
  - Expected Outcome(s): Provide information to be shared with practitioners in attendance with the expectation that it is shared with their colleagues and clients. Also, to gather feedback and issues from practitioners in attendance.
  - Media Relations Involvement: None
  - Congressional Affairs Involvement: None
  
- Sat., Oct. 28, 2017 Greensboro, NC (F2F) **DY**
  - NCSEA Tax Practice Management
  - Topics: Don't Take the Bait (National Tax Security Summer Summit); Tax Scheme Awareness; Identity Theft and Phishing; Practitioner Data Breaches; Tax Security Awareness
  - Stakeholder: NC Society of Enrolled Agents (NCSEA)
  - Est. Attendees: 20

- Expected Outcome(s): Sharing of IRS key messages and the securing of feedback on IRS programs and services.
- Media Relations Involvement: None
- Congressional Affairs Involvement: None

**Communications and Liaison – Weekly Activity Report**  
**Week of October 23, 2017**

**Internal Communications**

All employee email

- Commissioner: I truly appreciate your response to our country's natural disasters (C&L)

IRS Headlines

- Election Day is November 7; you may be eligible for time off to vote (HCO)
- Can you display political mementos in the workplace? (HCO)
- Identify and tag emails you need to keep longer than 20 years (PGLD)
- Never lose your hard work again with this simple file recovery trick (IT)

Leaders' Alert

- Participate in a panel discussion about our Hispanic workforce on November 15 (EDI)
- Skype for Business collaboration tool will help your employees work together (IT)
- Infectious disease reporting protocol: What you need to know (HCO)
- Professional liability insurance reimbursement is available (HCO)

Poll Question

- Of the over 7,400 IRS veteran employees, what percentage have military service during or before the Vietnam War? (EDI)

Spotlight

- Give yourself a brake (W&I)

Daily News (Webbies)

- Nominate an engaged workgroup by 11/9 for recognition in the fourth quarter (HCO)
- Reminder: Take a few minutes to self-certify your work location (AWSS)

**Media Relations**

Potential news releases for this week:

- Check your withholding
- Understanding the estimated tax penalty
- ITIN renewal/refund hold reminder
- Offshore Voluntary Compliance Initiative (OVCI) update

Potential releases for coming weeks:

- IRS offers one-stop resource center to new small businesses
- IRS launches re-designed Web site
- IRSAC annual report

**National Public Liaison**

Tue., Nov. 7, 1:45 pm - 2:35 pm – Panel discussion with LB&I Commissioner O'Donnell, SBSE Deputy Commissioner Ripperda and W&I Commissioner Corbin. AICPA National Tax Conference. Marriott Marquis, Washington, D.C.

Tue., Nov. 7, 3 pm – 5 pm – American Bar Association Tax Section Annual Courtesy Meeting with Commissioner Koskinen, Acting Chief Counsel Paul, and other IRS leaders. Room 2116.

**Legislative Affairs**

**UPCOMING MEETINGS:**

Currently, there are no meetings scheduled.

**UPCOMING HEARINGS:**

Currently, there are no hearings scheduled.

Not IRS Agency Records



## Social Media

### WEB – Current front page

- Feature card: Scams reminder (changing Tue. Estimated Tax *\*new web section*)
- Image card: Disaster Relief (*\*new image*)
- Non-image card: Security Summit
  - changing Mon. Check your withholding
  - changing Fri. ITIN renewal
- VIDEO: current: Individual Taxpayer Identification Number (ITIN) – Spanish
  - changing Mon. to IRS Withholding Calculator: [English](#)
  - changing Fri. to How to Voluntarily Correct the Classification of Your Workers *\*new*
- Embedded Tweet: Donating to hurricane recovery efforts? Remember a [#charityscam](#) may fake a name to seem like a real [#nonprofit](#).  
<http://irs.gov/eoselectcheck>
  - Changing Mon: Tax Forum online
  - Changing Fri: Estimated Taxes: Sharing economy

### TWITTER

- Pinned: [#IRS](#) warns [#TaxPros](#): Don't open doors for scams that take over tax client accounts. <http://www.IRS.gov/securitysummit> [#DontTakeTheBait](#) (changing Wed)
- Check your withholding *\*new*
- Estimated Taxes: Sharing economy,
- ITIN *\*new*
- Tax Forums online
- Protect Your Clients (cards)
- Scams
- Volunteer for VITA/TCE
- [#IRSTaxTips](#)

- PTIN renewals/applications for 2018
- Disaster Relief (including wildfires) *\*updated*
- Charity scams *\*potential*
- Estimated taxes *\*new*
- Offshore Voluntary Compliance Initiative (OVCI) update *\*potential*

#### FB TABS (Spanish FB public starting Monday)

- Security Summit
- Protect Your Clients (*change card*)
- Tax Scams: Tax Scams / Consumer Alerts
- ITIN Info
- YouTube
  - Current - Individual Taxpayer Identification Number (ITIN)
  - Wed - IRS Withholding Calculator
- Disaster Tax Relief
- Drought Relief
- Charity scams
- VITA volunteers
- Taxpayer Bill of Rights

#### VIDEO TT FRIDAY

- English: How to Voluntarily Correct the Classification of Your Workers  
*\*New video*
- Spanish: IRS Withholding Calculator

#### Stakeholder Liaison

- Mon. – Fri., Oct. 30- Nov. 4, 2017 (F2F) **MAR, LB for KDW**
  - Locations: Baltimore, MD; Houston, TX; Arlington Heights, IL; Kansas City, MO; Philadelphia, PA; New Orleans, LA; Columbus, OH; San Francisco, CA; Cerritos, CA; New York, NY; Denver, CO; Atlanta, GA; Tampa, FL; Boston, MA; Bloomington, MN; Arlington, TX
  - APA Preparing for Year End
  - Topics: Topics: "Don't Take the Bait", W-2 Verification Code updates and IRS Resources for Payroll Professionals
  - Stakeholder: American Payroll Association
  - Est. Attendees: Varies depending on location
  - Expected Outcome(s): Make payroll professionals better aware of the W-2 schemes so as to avoid them; Information to be shared with other payroll personnel.
  - Media Relations Involvement: Worked out of HQ, No Media.
  - Congressional Affairs Involvement: N/A
- Mon., Oct. 30, 2017 Hartford, CT (F2F) **MAR**
  - Tax Planning and Reporting for Small Businesses
  - Topics: 2017 Fall Outreach; Direct Pay; Employer Tax Withholding Responsibilities; Independent Contractor or Employee; New

- Entrepreneurs Initiative; Payment Options; Sched. C Initiative; Small Business Recordkeeping
  - Stakeholder: Small Business Administration – CT
  - Est. Attendees: 30
  - Expected Outcome(s): Increased Small Business Compliance
  - Media Relations Involvement: N/A
  - Congressional Affairs Involvement: N/A
- Mon., Oct. 30, 2017 Tampa, FL (F2F) **VM for GT**
  - FICPA Tax Section/IRS Liaison Meeting
  - Topic: Online Account Information for Balance Due; Tax Scheme Awareness; Changes to OIC Policy; Correspondence Exams; Field Audit Process
  - Stakeholders: Florida Institute of Certified Public Accountants (FICPA) - Headquarters
  - Est. Attendees: 30
  - Expected Outcome(s): Share current IRS updates, identify issues practitioners may be experiencing and give tax practitioners information to help identify current tax schemes and data breach tactics.
  - Media Relations Involvement: Not an IRS event.
  - Congressional Affairs Involvement: Not an IRS event.
- Mon., Oct. 30, 2017 Louisville, KY (F2F) **CEC**
  - Kentucky Practitioner Liaison Meeting
  - Topic: Practitioner Data Breaches, Identity Theft, Disaster Relief, Abusive Tax Promotions and/or Promoters, Liens and Private Debt Collection, Problem Solving Day
  - Stakeholders: Kentucky Society of Certified Public Accountants
  - Est. Attendees: 75
  - Expected Outcome(s): Share current IRS updates, identify issues practitioners may be experiencing.
  - Media Relations Involvement: None
  - Congressional Affairs Involvement: None
- Mon., Oct. 30, 2017 Honolulu, HI (F2F) **KD for DG**
  - 2017 Honolulu/Oahu Department of Taxation Workshop
  - Topics: Don't Take the Bait (National Tax Security Summer Summit); Practitioner Data Breaches
  - Stakeholder: State of Hawaii Department of Taxation
  - Est. Attendees: 250
  - Expected Outcome(s): SL will advise tax pros of the risk of data breaches and their responsibility to protect client data. SL expects to discuss partnering to provide webinars and other virtual presentations, as well as a possible Cyber-Security Symposium with the State of Hawaii.
  - Media Relations Involvement: N/A
  - Congressional Affairs Involvement: N/A



- Mon., Oct. 30, 2017 Grand Rapids, MN (F2F) **LB for KDW**
  - 2017 Tax Practitioner Institute
  - Topics: Don't Take the Bait; Online Account Information for Balance Due; Private Debt Collection; Taxpayer Digital Communications; E-Services Authentication Process; Field Audit Process; Future State; Identity Theft and Phishing; New Secure Access Process for Get Transcript; Practitioner Data Breaches
  - Stakeholder: Univ. of MN College of Continuing Education
  - Est. Attendees: 95
  - Expected Outcome(s): Increase voluntary compliance with Enrolled Agents, CPAs and Unaffiliated Practitioners, by sharing IRS approved messages. Improves taxpayer service
  - Media Relations Involvement: None
  - Congressional Affairs Involvement: None
  
- Mon., Oct. 30, 2017 Richmond, VA (F2F) **DY**
  - Annual Federal State Tax Workshop
  - Topics: Don't Take the Bait; Online Account Information for Balance Due; Private Debt Collection; Taxpayer Digital Communications; E-Services Authentication Process; Field Audit Process; Future State; Identity Theft and Phishing; New Secure Access Process for Get Transcript; Practitioner Data Breaches
  - Stakeholder: Virginia Tech Income Tax School
  - Est. Attendees: 150
  - Expected Outcome(s): TPI, reaching many practitioners not associated with organizations
  - Media Relations Involvement: None, media done by educational institution
  - Congressional Affairs Involvement: None
  
- Tues., Oct. 31, 2017 Honolulu, HI (F2F) **KD for DG**
  - Hawaii Association of Professional Accountants Annual Seminar
  - Topics: Don't Take the Bait (National Tax Security Summer Summit); ITIN Renewal Process; Online Account Information for Balance Due; Passport Revocation or Denial; Private Debt Collection; E-Services Authentication Process; Identity Theft and Phishing; New Secure Access Process for Get Transcript
  - Stakeholder: Hawaii Association of Public Accountants
  - Est. Attendees: 90
  - Expected Outcome(s): SL will inform tax pros of data breach risks and their responsibility to protect client data. SL will also encourage and promote virtual presentations for timely delivery of IRS messages to their organizations. In addition, SL will collaborate with LTA to provide Problem Resolution for difficult cases.
  - Media Relations Involvement: N/A
  - Congressional Affairs Involvement: N/A

- Tues., Oct. 31, 2017 Buffalo, NY (F2F) **MCP**
  - 64th Tax Institute, day and a half event
  - Topics: Don't Take the Bait (National Tax Security Summer Summit); ITIN Renewal Process; Online Account Information for Balance Due; E-Services Authentication Process; Practitioner Data Breaches
  - Stakeholder: University at Buffalo School of Management
  - Est. Attendees: 250
  - Expected Outcome(s): Provides a means of reviewing and clarifying provisions and patterns of federal tax laws with the most up to day information regarding the substance and administration of tax laws.
  - Media Relations Involvement: none
  - Congressional Affairs Involvement: none
  
- Tues., Oct. 31, 2017 Baton Rouge, LA (F2F) **CEC**
  - 2017 Tax Law Updates for Non-Affiliated Preparers & CPAs
  - Topics: Private Debt Collection; Tax Scheme Awareness; E-Services Authentication Process; Identity Theft and Phishing; Tax Security Awareness
  - Stakeholder: Louisiana Department of Revenue-Practitioner Outreach
  - Est. Attendees: 75
  - Expected Outcome(s): Share current IRS updates, identify issues practitioners may be experiencing.
  - Media Relations Involvement: None
  - Congressional Affairs Involvement: None
  
- Tues., Oct. 31, 2017 Charleston, WV(F2F) **MAR**
  - 21st Annual WVU Income Tax Schools
  - Topics: Don't Take the Bait (National Tax Security Summer Summit); Private Debt Collection; Tax Scheme Awareness; 2017 Tax Practitioner Institutes; E-Services Authentication Process; Field Audit Process; Future State; Identity Theft and Phishing; Return Preparer Review Strategy
  - Stakeholder: West Virginia University Extension Service
  - Est. Attendees: 200
  - Expected Outcome(s): Share IRS priority messages, identify issues, help tax pros to avoid data thefts and gather feedback from participants,
  - Media Relations Involvement: N/A
  - Congressional Affairs Involvement: N/A
  
- Tues., Oct. 31, 2017 Garden City, KS (F2F) **CEC**
  - Kansas Income Tax Institute (Leveraged Event)
  - Topics: Online Account Information for Balance Due; Private Debt Collection; 2017 Tax Practitioner Institutes; Annual Filing Season Program; Direct Pay; Identity Theft and Phishing
  - Stakeholder: University at Buffalo School of Management
  - Est. Attendees: 85

- Expected Outcome(s): Share current IRS updates, identify issues practitioners may be experiencing.
  - Media Relations Involvement: N/A
  - Congressional Affairs Involvement: N/A
- Tues., Oct. 31, 2017 Ft. Wayne, IN (F2F) **LB for KDW**
  - Purdue University Income Tax School
  - Topics: Online Account Information for Balance Due; Private Debt Collection; 2017 Tax Practitioner Institutes; Annual Filing Season Program; Direct Pay; Identity Theft and Phishing
  - Stakeholder: Purdue University
  - Est. Attendees: 75
  - Expected Outcome(s): Increase voluntary compliance with Enrolled Agents, CPAs and Unaffiliated Practitioners, by sharing IRS approved messages. Improves taxpayer service
  - Media Relations Involvement: None
  - Congressional Affairs Involvement: None
- Wed., Nov. 1, 2017 Nationwide (V) **KD for DG**
  - Don't Take the Bait National Webinar
  - Topics: Don't Take the Bait
  - Stakeholder: Practitioners Nationwide
  - Est. Attendees: 4,950
  - Expected Outcome(s): Practitioners will hopefully take action to protect themselves and their clients records from cyber security threats and put together an action plan in case they do experience an incident. Questions received via "Ask Question" feature during the webinar will be reviewed and analyzed for trends, emerging issues and greatest concerns, in order to develop more effective resources.
  - Media Relations Involvement: N/A
  - Congressional Affairs Involvement: N/A
- Wed., Nov.1 & 2, 2017 Augusta, ME (F2F) **MAR**
  - 21<sup>st</sup> Annual Maine Tax Forum
  - Topics: Field Audit Process; 2017 Fall Outreach; Practitioner Data Breaches, Don't Take the Bait
  - Stakeholder: Maine SCORE
  - Est. Attendees: 600
  - Expected Outcome(s): Share IRS priority messages, identify issues, help tax pros to avoid data thefts and gather feedback from participants,
  - Media Relations Involvement: N/A
  - Congressional Affairs Involvement: N/A
- Wed., Nov. 1, 2017 Lakewood, NJ (F2F) **MAR**
  - Annual Federal State Tax Workshop
  - Topics: 2017 Tax Law Updates; Don't Take the Bait; Data Compromises; IRS Future State; Understanding Collection;
  - Stakeholder: NJ Association of Public Accountants

- Est. Attendees: 80
  - Expected Outcome(s): Share IRS priority messages, identify issues, help tax pros to avoid data thefts and gather feedback from participants,
  - Media Relations Involvement: N/A
  - Congressional Affairs Involvement: N/A
- Wed., Nov. 1, 2017 Honolulu, HI (F2F) **KD for DG**
  - National Association of Tax Professionals Hawaii State Convention
  - Topics: Don't Take the Bait (National Tax Security Summer Summit); Private Debt Collection; Identity Theft and Phishing; Practitioner Data Breaches
  - Stakeholder: NATP – Hawaii Chapter
  - Est. Attendees: 95
  - Expected Outcome(s): SL will advise tax pros of the risk of data breaches and their responsibility to protect client data. SL will also encourage and promote virtual presentations for timely delivery of IRS messages to their organizations. In addition, SL is collaborating with LTA to provide Problem Resolution for resolving difficult cases.
  - Media Relations Involvement: N/A
  - Congressional Affairs Involvement: N/A
- Wed., Nov. 1, 2017 Columbia, SC (F2F) **DY**
  - 2017 Annual Small Business and Farm Income Tax Course
  - Topics: Private Debt Collection; Employer Tax Withholding Responsibilities; E-Services Authentication Process; ITIN Outreach - Path Act; Practitioner Data Breaches; Reporting abusive tax promotions and/or promoters - Lead Development Center; Sharing Economy
  - Stakeholder: Clemson University, School of Agricultural, Forest and Environmental Sciences
  - Est. Attendees: 315
  - Expected Outcome(s): TPI, reaching unaligned practitioners
  - Media Relations Involvement: None, media conducted by educational institution
  - Congressional Affairs Involvement: None
- Wed., Nov. 1, 2017 Hammond, LA (F2F) **CEC**
  - 2017 Tax Law Updates for Non-Affiliated Preparers & CPAs
  - Topics: Private Debt Collection; Tax Scheme Awareness; E-Services Authentication Process; Identity Theft and Phishing; Tax Security Awareness
  - Stakeholder: Louisiana Dept. of Revenue
  - Est. Attendees: 75
  - Expected Outcome(s): Share current IRS updates, identify issues practitioners may be experiencing and give tax practitioners information to help identify current tax schemes and data breach tactics.
  - Media Relations Involvement: N/A
  - Congressional Affairs Involvement: N/A

- Wed., Nov. 1, 2017 Morgantown, WV (F2F) **MAR**
  - 21st Annual WVU Income Tax Schools
  - Topics: Private Debt Collection; Employer Tax Withholding Responsibilities; E-Services Authentication Process; ITIN Outreach - Path Act; Practitioner Data Breaches; Reporting abusive tax promotions and/or promoters - Lead Development Center; Sharing Economy
  - Stakeholder: West Virginia University - Extension Service
  - Est. Attendees: 100
  - Expected Outcome(s): Share IRS priority messages, identify issues, help tax pros to avoid data thefts and gather feedback from participants,
  - Media Relations Involvement: N/A
  - Congressional Affairs Involvement: N/A
- Wed., Nov. 1, 2017 Manchester, NH (F2F) **MCP**
  - 38th UNH Annual Tax Institute
  - Tax Professionals from MA, NH and VT attend
  - Topics: Employer Tax Withholding Responsibilities; E-Services Authentication Process; Identity Theft and Phishing; Practitioner Data Breaches, Landgrant book used.
  - Stakeholder: University of New Hampshire Tax Institute
  - Est. Attendees: 220
  - Expected Outcome(s): Annual event to keep tax professionals, large segment nonaffiliated on Federal tax law and regulation updates.
  - Media Relations Involvement: none
  - Congressional Affairs Involvement: none
- Wed., Nov. 1, 2017 Huntsville, AL (F2F) **CEC**
  - Auburn University Tax Professional Seminar
  - Topics: Private Debt Collection; E-Services Authentication Process
  - Stakeholder: Auburn University
  - Est. Attendees: 325
  - Expected Outcome(s): Share current IRS updates, identify issues practitioners may be experiencing.
  - Media Relations Involvement: N/A
  - Congressional Affairs Involvement: N/A
- Wed., Nov. 1, 2017 Terre Haute, IN (F2F) **LB for KDW**
  - Indiana University Tax Practitioner Institute
  - Topics: Private Debt Collection; Employer Tax Withholding Responsibilities; E-Services Authentication Process; ITIN Outreach - Path Act; Practitioner Data Breaches; Reporting abusive tax promotions and/or promoters - Lead Development Center; Sharing Economy
  - Stakeholder: Indiana University Conferences
  - Est. Attendees: 75

- Expected Outcome(s): Increase voluntary compliance with Enrolled Agents, CPAs and Unaffiliated Practitioners, by sharing IRS approved messages. Improves taxpayer service
  - Media Relations Involvement: None
  - Congressional Affairs Involvement: None
- Wed., Nov. 1, 2017 Colby, KS (F2F) **CEC**
  - Kansas Income Tax Institute – Colby (Leveraged Event)
  - Topics: Online Account Information for Balance Due; Private Debt Collection; 2016 Tax Practitioner Institutes; Annual Filing Season Program; Direct Pay; Identity Theft and Phishing
  - Stakeholder: Kansas State University AG Management
  - Est. Attendees: 50
  - Expected Outcome(s): Share current IRS updates, identify issues practitioners may be experiencing.
  - Media Relations Involvement: N/A
  - Congressional Affairs Involvement: N/A
- Wed., Nov. 1, 2017 Okemos, MI (F2F) **LB for KDW**
  - Michigan State University Tax Schools
  - Topics: Private Debt Collection; Employer Tax Withholding Responsibilities; E-Services Authentication Process; ITIN Outreach - Path Act; Practitioner Data Breaches; Reporting abusive tax promotions and/or promoters - Lead Development Center; Sharing Economy
  - Stakeholder: Michigan State University Tax Schools
  - Est. Attendees: 50
  - Expected Outcome(s): Increase voluntary compliance with Enrolled Agents, CPAs and Unaffiliated Practitioners, by sharing IRS approved messages. Improves taxpayer service
  - Media Relations Involvement: None
  - Congressional Affairs Involvement: None
- Wed., Nov. 1, 2017 Weyers Cave, VA (F2F) **DY**
  - Tax Practitioner Institute
  - Topics: Don't Take the Bait; Online Account Information for Balance Due; Private Debt Collection; Tax Scheme Awareness; Taxpayer Digital Communications (TDC); E-Services Authentication Process; Field Audit Process; Future State; New Secure Access Process for Get Transcript; Practitioner Data Breaches; Reporting abusive tax promotions and/or promoters - Lead Development Center; Return Preparer Review Strategy; Service Approach; Sharing Economy
  - Stakeholder: Virginia Tech Income Tax School
  - Est. Attendees: 150
  - Expected Outcome(s): TPI, reaching unaligned practitioners
  - Media Relations Involvement: None, media conducted by educational institution
  - Congressional Affairs Involvement: None
- Wed., Nov. 1, 2017 St. Cloud, MN (F2F) **LB for KDW**

- University of Minnesota Income Tax Short Course
- Topics: Don't Take the Bait (National Tax Security Summer Summit); Due Date for Information Return Statements W-2 and 1099-Misc (Box 7); Private Debt Collection; Tax Scheme Awareness; 2017 Tax Practitioner Institutes
- Stakeholder: Indiana University Conferences
- Est. Attendees: 110
- Expected Outcome(s): Increase voluntary compliance with Enrolled Agents, CPAs and Unaffiliated Practitioners, by sharing IRS approved messages. Improves taxpayer service
- Media Relations Involvement: None
- Congressional Affairs Involvement: None
  
- Thurs., Nov. 2, 2017 Nationwide (V) **KD for DG**
  - Racing Towards Year End: Employment Tax Reminders
  - Topics: Don't Take the Bait  
Employment Tax Issues  
Identity Theft and Phishing
  - Stakeholder: Practitioners Nationwide
  - Est. Attendees: 1,000
  - Expected Outcome(s): Provide information on data protection and steps practitioners should take if they experience a data breach. Employment tax issues will also be discussed. Questions received via "Ask Question" feature during the webinar will be reviewed and analyzed for trends, emerging issues and greatest concerns, in order to develop more effective resources.
  - Media Relations Involvement: N/A
  - Congressional Affairs Involvement: N/A
  
- Thurs., Nov. 2, 2017 Fredericksburg, VA (F2F) **DY**
  - 2017 Federal Income Tax Changes
  - Topics: Identity Theft and Phishing; Practitioner Data Breaches; Tax Security Awareness
  - Stakeholder: National Association of Tax Professionals (Virginia Chapter)
  - Est. Attendees: 100
  - Expected Outcome(s): Education on preventing data breaches, secure feedback from attendees
  - Media Relations Involvement: None
  - Congressional Affairs Involvement: None
  
- Thurs., Nov. 2, 2017 Burlington, VT (F2F) **MAR**
  - Vermont Society of CPAs fall meeting
  - Topics: Don't Take the Bait
  - Stakeholder: VT SOCIETY OF CPAS
  - Est. Attendees: 85
  - Expected Outcome(s): Share IRS priority messages, identify issues, help tax pros to avoid data thefts and gather feedback from participants,
  - Media Relations Involvement: N/A

- Congressional Affairs Involvement: N/A
- Thurs., Nov. 2, 2017 Honolulu, HI (F2F) **KD for DG**
  - Practitioner Liaison Meeting
  - Topics: Don't Take the Bait (National Tax Security Summer Summit); ITIN Renewal Process; Online Account Information for Balance Due; Passport Revocation or Denial; Private Debt Collection; EITC Due Diligence; E-Services Authentication Process
  - Stakeholder: NATP – Hawaii Chapter
  - Est. Attendees: 25
  - Expected Outcome(s): SL will advise tax pros of data breach risks and their responsibility to protect client data. SL will also encourage and promote virtual presentations for timely delivery of IRS messages to their organizations.
  - Media Relations Involvement: N/A
  - Congressional Affairs Involvement: N/A
- Thurs., Nov. 2, 2017 San Luis Obispo, CA (F2F) **KD for DG**
  - Central Coast Small Business Forum
  - Topics: Don't Take the Bait (National Tax Security Summer Summit); Online Account Information for Balance Due; Tax Scheme Awareness; Employment Tax Issues; Identity Theft and Phishing; Leveraged SB Tax Workshops; New Entrepreneurs Initiative; Online Tax Calendar; Sharing Economy
  - Stakeholder: SCORE – San Luis Obispo
  - Est. Attendees: 15
  - Expected Outcome(s): SL hopes to foster a closer working relationship with industry stakeholders in the Central Coast region of California. SL will look for opportunities to collaborate on outreach events and activities that increase the reach of messages and information relevant to the small business community.
  - Media Relations Involvement: N/A
  - Congressional Affairs Involvement: N/A
- Thurs., Nov. 2, 2017 Gibsonburg, OH (L) **LB for KDW**
  - 2017 Ohio State University Income Tax School
  - Topics: Private Debt Collection; E-Services Authentication Process; Identity Theft and Phishing; Return Preparer Review Strategy
  - Stakeholder: Ohio State University
  - Est. Attendees: 70
  - Expected Outcome(s): Increase voluntary compliance with Enrolled Agents, CPAs and Unaffiliated Practitioners, by sharing IRS approved messages. Improves taxpayer service
  - Media Relations Involvement: None
  - Congressional Affairs Involvement: None
- Thurs., Nov. 2, 2017 Florence, AL (F2F) **CEC**
  - Auburn University Tax Professional Seminar



- Topics: Private Debt Collection; Tax Scheme Awareness; E-Services Authentication Process; Tax Security Awareness
- Stakeholder: Auburn University
- Est. Attendees: 185
- Expected Outcome(s): Share current IRS updates, identify issues practitioners may be experiencing and give tax practitioners information to help identify current tax schemes and data breach tactics.
- Media Relations Involvement: N/A
- Congressional Affairs Involvement: N/A
  
- Thurs., Nov. 2, 2017 Hays, KS (F2F) **CEC**
  - Kansas Income Tax Institute – Hays (Leveraged Event)
  - Topics: Online Account Information for Balance Due; Private Debt Collection; 2016 Tax Practitioner Institutes; Annual Filing Season Program; Direct Pay; Identity Theft and Phishing
  - Stakeholder: Kansas State University AG Management
  - Est. Attendees: 100
  - Expected Outcome(s): Share current IRS updates, identify issues practitioners may be experiencing.
  - Media Relations Involvement: N/A
  - Congressional Affairs Involvement: N/A
  
- Thurs., Nov. 2, 2017 Cape Girardeau, MO (F2F) **CEC**
  - Missouri Society of CPA's Fall Tax Institute
  - Topics: Taxpayer Digital Communications (TDC); 2016 Tax Practitioner Institutes; Annual Filing Season Program; CAF - Third Party Authorizations; Excise Tax - Form 2290
  - Stakeholder: Missouri Society of CPA's
  - Est. Attendees: 100
  - Expected Outcome(s): Share current IRS updates, identify issues practitioners may be experiencing.
  - Media Relations Involvement: N/A
  - Congressional Affairs Involvement: N/A
  
- Thurs., Nov. 2, 2017 Traverse City, MI (V) **LB for KDW**
  - University of Michigan Tax Practitioner Institute
  - Topics: Online Account Information for Balance Due; ITIN Outreach - Path Act; Practitioner Data Breaches
  - Stakeholder: University of Michigan
  - Est. Attendees: 50
  - Expected Outcome(s): Increase voluntary compliance with Enrolled Agents, CPAs and Unaffiliated Practitioners, by sharing IRS approved messages. Improves taxpayer service
  - Media Relations Involvement: None
  - Congressional Affairs Involvement: None
  
- Thurs., Nov. 2, 2017 Cookeville, TN (F2F) **CEC**
  - UT Tax Practitioner Institute Seminars

- Topics: Private Debt Collection; Tax Scheme Awareness; E-Services Authentication Process; Future State; Identity Theft and Phishing; Return Preparer Review Strategy
- Stakeholder: University of Tennessee Income Tax Seminars
- Est. Attendees: 130
- Expected Outcome(s): Share current IRS updates, identify issues practitioners may be experiencing and give tax practitioners information to help identify current tax schemes and data breach tactics.
- Media Relations Involvement: N/A
- Congressional Affairs Involvement: N/A
  
- Thurs., Nov. 2, 2017 Eau Claire, WS (F2F) **LB for KDW**
  - Wisconsin Annual Income Tax Course
  - Topics: Private Debt Collection; Tax Scheme Awareness; E-Services Authentication Process; Future State; Identity Theft and Phishing; Return Preparer Review Strategy
  - Stakeholder: Tax Insight, LLC Income Tax Institute
  - Est. Attendees: 220
  - Expected Outcome(s): Increase voluntary compliance with Enrolled Agents, CPAs and Unaffiliated Practitioners, by sharing IRS approved messages. Improves taxpayer service
  - Media Relations Involvement: None
  - Congressional Affairs Involvement: None
  
- Fri., Nov. 3, 2017 Williamsburg, VA (V) **DY**
  - Tax Identity Theft Webinar
  - Topics: Don't Take the Bait (National Tax Security Summer Summit); Tax Scheme Awareness; Identity Theft and Phishing; Tax Security Awareness
  - Stakeholder: Greater Williamsburg Chamber of Commerce
  - Est. Attendees: 100
  - Expected Outcome(s): Education on preventing data breaches, securing feedback from attendees, testing out new technology for attendees
  - Media Relations Involvement: None
  - Congressional Affairs Involvement: None
  
- Fri., Nov. 3, 2017 Sewell, NJ (F2F) **MAR**
  - Annual Federal State Tax Workshop
  - Topics: 2017 Tax Law Updates; Data Compromises; IRS Future State; Understanding Collection
  - Stakeholder: NJAPA (New Jersey Association of Public Accountants)
  - Est. Attendees: 80
  - Expected Outcome(s): Share IRS priority messages, identify issues, help tax pros to avoid data thefts and gather feedback from participants,
  - Media Relations Involvement: N/A
  - Congressional Affairs Involvement: N/A

- Fri., Nov. 3, 2017 Glen Allen, VA (F2F) **DY**
  - IRS-Virginia Society of CPA Annual Practitioner Event
  - Topics: Private Debt Collection; Collection User Fees; Direct Pay; Identity Theft and Phishing; Online Payment Agreements; Payment Options; Practitioner Data Breaches
  - Stakeholder: Virginia Society of CPA's
  - Est. Attendees: 75
  - Expected Outcome(s): Education on preventing data breaches and other key messages, securing feedback from attendees
  - Media Relations Involvement: None
  - Congressional Affairs Involvement: None
  
- Fri., Nov. 3, 2017 Detroit, MI (V) **LB for KDW**
  - Michigan Practitioner Liaison Meeting
  - Topics: Don't Take the Bait (National Tax Security Summer Summit) ITIN Renewal Process  
2017 Fall Outreach  
Identity Theft and Phishing  
ITIN Outreach - Path Act
  - Stakeholder: Michigan Association of Certified Public Accountants
  - Est. Attendees: 50
  - Expected Outcome(s): Share current IRS updates, identify issues practitioners may be experiencing and give tax practitioners information to help identify current tax schemes and data breach tactics.
  - Media Relations Involvement: None
  - Congressional Affairs Involvement: None
  
- Fri., Nov. 3, 2017 Honolulu, HI (F2F) **KD for DG**
  - Hawaii Small Business Forum
  - Topics: Don't Take the Bait (National Tax Security Summer Summit); Online Account Information for Balance Due; Identity Theft and Phishing; Sharing Economy
  - Stakeholder: State of Hawaii, Dept. of Commerce & Consumer Affairs
  - Est. Attendees: 20
  - Expected Outcome(s): SL will discuss "Don't Take the Bait" and IRS resources. SL's goal is to reconnect with existing partners, meet new industry partners and set up future leveraged and virtual outreach. SL also hopes to share IRS information on partner websites and social media.
  - Media Relations Involvement: N/A
  - Congressional Affairs Involvement: N/A
  
- Fri., Nov. 3, 2017 Yankton, SD (V) **LB for KDW**
  - South Dakota State University Tax Update
  - Topics: Online Account Information for Balance Due; ITIN Outreach - Path Act; Practitioner Data Breaches

- Stakeholder: University - SD - SDSU TPI Continuing & Extended Ed
- Est. Attendees: 40
- Expected Outcome(s): Increase voluntary compliance with Enrolled Agents, CPAs and Unaffiliated Practitioners, by sharing IRS approved messages. Improves taxpayer service
- Media Relations Involvement: None
- Congressional Affairs Involvement: None

## **Communications and Liaison – Weekly Activity Report Week of October 2, 2017**

### **Internal Communications**

#### Headlines

- Travelers: Avoid common errors with parking expenses, baggage fees (CFO)
- Help IRS space planning efforts by certifying your location (AWSS)
- Do you need virtual or classroom training support? (HCO)
- Reset your HRConnect password yourself (HCO)
- Get ready for federal benefits open season, beginning 11/13 (HCO)
- Learn about changes to the Agency Grievance System (HCO)

#### Highlights from Services and Enforcement

- SB/SE tackles tricky Section 465 aggregation rule (DCSE)

#### Leaders' Alert

- Your employees considering retirement may be interested in the Cincinnati Submission Processing job swap (W&I)
- Take action to complete the SharePoint 2013 visual upgrade (IT)

#### Poll Question

- What are the leading causes of office fires, in order of greatest to least? (AWSS)

#### Spotlight

- Spotlight revisited: officially reaching goals (CI)

#### Webbies

- Focus on driving when you're behind the wheel (AWSS)
- Office 365 upgrade: Keep workstation on network during PST import process (IT)

### **Media Relations**

#### Potential news releases for this week:

- Reminder for extension filers: Prior-year adjusted gross income
- Injured/innocent spouse requests
- Tax-filing extension reminder; over-looked tax benefits

#### Potential releases for coming weeks:

- Scams warning – top three scams
- Understanding the estimated tax penalty
- IRS Notices in the mail to some taxpayers
- IRS launches re-designed Web site
- Oct. 16 deadline for extension filers
- IRS offers one-stop resource center to new small businesses
- Pension limitations – cost of living adjustments
- Tax year 2017 inflation adjustments

### **National Public Liaison**

Thursday Oct. 5, 1 p.m. ET – Security Summit Tax Pros Group meets. Conference call.

Thursday, Oct. 5, 1 p.m. ET - Payroll Industry Call.

Friday Oct. 6, 1 p.m. ET – Appeals Chief Donna Hansberry briefs NPL stakeholders on upcoming changes to Appeals in-person meetings. Conference call.

## **Legislative Affairs**

Not IRS Agency Records



### **UPCOMING HEARINGS:**

On Wednesday, October 4, 2017, a hearing is scheduled to be held before the Ways & Means Oversight Subcommittee, House Ways and Means Committee on the state of IRS' information technology. The hearing is scheduled for 10:00 am, in room 1100 of the Longworth House Office Building.

Witnesses: Jeff Tribiano, Deputy Commissioner for Operations Support and Gina Garza, Chief Information Officer are scheduled to testify

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## **Social Media**

WEB – Current front page

- SPANISH VIDEO: Volunteer recruitment: <https://youtu.be/NDqpM5hIBXg>
- Embedded Tweet: If you got a [#tax](#) extension you can still get help to meet the Oct. 16 [#IRS](#) deadline. <https://go.usa.gov/xRh6x>
- Feature: Education benefits (changing Wed. to Educators' tax deduction)
- Don't take the bait

TWITTER

### **Topics include:**

- Pinned: [#IRSemployee](#) in the [#HurricaneMaria](#) disaster area? Contact the ERC to report your status if you haven't already. <http://www.irs.gov/employee>
- IRS employees affected by Maria report thru ERC *\*New*
- Hurricane Maria
- Disaster Relief
- Educators deduction (10/5 [#WorldTeachersDay](#))
- Volunteer for VITA/TCE
- Education Benefits *\*New*
- Drought relief *\*New*
- Oct 15 deadline
- Where's my amended return

- Shared Economy
- #IRSTaxTips: extensions, phone scams, reconstructing records, credits *\*New*
- Domestic Violence Awareness Month - [Tax Information for Survivors of Domestic Abuse](#) *\*Tentative*

#### FB TABS

- Hot Topics: Let Us Help You
- Tax Scams: Tax Scams / Consumer Alerts
- ITIN Info
- YouTube
- Disaster Tax Relief *\*New*
- Informacion sobre ITIN
- EO Select Check
- Education Benefits *\*New*
- Security Summit
- Taxpayer Bill of Rights

#### **Stakeholder Liaison Field**

- Wed., Oct. 4, 2017 Phoenix, AZ (F2F) VM for GT
  - Business Expo Forum 2017 - Tools for the success of your business
  - Topic: New Entrepreneurs Initiative and ITIN
  - Stakeholder: DAS Foundation and Duran Accounting Solutions
  - Est. Attendees: 400
  - Expected Outcome(s): Increased SL reach within Spanish Speaking Community and new stakeholder relationships with other organizations in attendance. Over 30 government, non-profit, and business organizations that provide small business resources will be at the event.
- Thurs., Oct. 5, 2017 Mesa, AZ (F2F) VM for GT
  - Mesa Business Expo Forum 2017 - Tools for the success of your business
  - Topic New Entrepreneurs Initiative and ITIN
  - Stakeholder: DAS Foundation and Duran Accounting Solutions
  - Est. Attendees: 400
  - Expected Outcome(s): Increased SL reach within Spanish Speaking Community and new stakeholder relationships with other organizations in attendance. Over 30 government, non-profit, and business organizations that provide small business resources will be at the event.
- Thurs., Oct. 5, 2017 Ceres, CA (F2F) JHB for DG
  - Small Business Seminar
  - Topics: Due Date for Information Return Statements W-2 and 1099-Misc (Box 7); Form 2290, Heavy Highway Vehicle Use Tax; Online Account Information for Balance Due; Private Debt Collection; Dirty Dozen; New due dates for information return statements W-2 & 1099-MISC for 2017; Online Payment Agreements
  - Stakeholder: BOE California State Board of Equalization
  - Est. Attendees: 200
  - Expected Outcome(s): SL sharing current quarterly OID priorities, networking and learning what resources and future industry events IRS

can participate with these agencies to share IRS' key messages with small businesses, etc.

- Thurs., Oct. 5 2017 Greensboro, NC (F2F) DY
  - Small Business Taxes: Brown Bag Series
  - Topics: Payment Options and Other Online Tools; Tax Scheme Awareness; Leveraged SB Tax Workshops; New Entrepreneurs Initiative; Payment Options; Small Business Recordkeeping
  - Stakeholder: City of Greensboro
  - Est. Attendees: 50
  - Expected Outcome(s): New relationship reaching North Carolina Chambers of Commerce, City government and Library business connections. Purpose of the event is to establish the initial relationships with the goal to leverage them in the future as well as to educate primarily new entrepreneurs and those that work with them on basic tax responsibilities. Efforts will be made to educate the partners on possibly sponsoring and conducting future leveraged tax workshops as well as to educate taxpayers on IRS resources available to them including the leveraged workshop program.
- Thurs., Oct. 5, 2017 Hartford, CT (F2F) MR
  - Tax Planning and Reporting for Small Businesses
  - Topics: 2017 Fall Outreach; Employer Tax Withholding Responsibilities; Independent Contractor or Employee; New Entrepreneurs Initiative; Online Payment Agreements; Payment Options; Schedule. C Initiative; Small Business Recordkeeping
  - Stakeholder: Small Business Administration - CT
  - Est. Attendees: 30
  - Expected Outcome(s): Increased compliance within Small Business Community
- Thurs., Oct. 5, 2017 Bloomington, MN (V) KW
  - First Thursday IMRS Call
  - Topic: IMRS; Don't Take the Bait; Notice 2017-54; Online Accounts; Disaster Relief Resources for Tax Pros; Beware of Charity Scams; upcoming IRS Web Conference Events
  - Stakeholders: Great Lakes & Mid-West Area Practitioner Organizations
  - Est. Attendees: 20
  - Expected Outcome(s): To determine if there are any current issues or concerns from the tax professional community in the Area. To share current IMRS issues
- Thurs., Oct. 5, 2017 Minneapolis, MN (F2F) KW
  - APA Statewide Convention - Payroll Around the World
  - Topics: Don't Take the Bait (National Tax Security Summer Summit); Tax Professional Data Theft; FIRE; Passport Revocation or Denial; Private Debt Collection; Identity Theft and Phishing; ITIN Outreach - Path Act; Work Opportunity Tax Credit (WOTC)
  - Stakeholders: APA - Northstar Chapter
  - Est. Attendees: 225
  - Expected Outcome(s): To share IRS Key messages with the payroll community in this State. To hear current issues and concerns from event attendees.



- Thurs., Oct. 5, 2017, Iselin, NJ (F2F) MR
  - 2017/18 Tax Updates
  - Topics: Don't Take the Bait (National Tax Security Summer Summit); Online Account Information for Balance Due; Passport Revocation or Denial; Private Debt Collection; Tax Scheme Awareness; Taxpayer Digital Communications (TDC); Automated Underreporter Program (AUR); Collection User Fees; Correspondence Exams; Direct Pay; New Secure Access Process for Get Transcript; Payment Options; Practitioner Data Breaches
  - Stakeholder: NATP – New Jersey Chapter
  - Est. Attendees: 100
  - Expected Outcome(s): Increase awareness among practitioners as to exiting cyber threats and that they take action to protect themselves from being victims
  
- Thurs., Oct. 5, 2017 Oklahoma, OK (F2F) KF for CC
  - 2017 Oklahoma Electric Coop Accountants Association Annual Conference
  - Topics: Don't Take the Bait (National Tax Security Summer Summit); Due Date for Information Return Statements W-2 and 1099-Misc (Box 7); ITIN Renewal Process; Online Account Information for Balance Due; Private Debt Collection; Tax Scheme Awareness; Taxpayer Digital Communications (TDC); Changes to OIC Policy; E-Services Authentication Process; ITIN Outreach - Path Act; New due dates for information return statements W-2 & 1099-MISC for 2017; Tax Security Awareness
  - Stakeholders: Oklahoma Electric Cooperative's Accountants Association
  - Est. Attendees: 60
  - Expected Outcome(s): SL will share current quarter initiatives. This is an opportunity to address and capture issues impacting the practitioner community.
  
- Sat., Oct. 7, 2017 Chicago, IL (F2F) KF for CC
  - Latina Style
  - Topic: New Entrepreneurs Initiative
  - Stakeholders: Latina Style Magazine
  - Est. Attendees: 200
- Expected Outcome(s): Industry Event (high profile). This is a good opportunity to leverage our message through a prominent LEP organization. The event information will also be summarized in the Latina Style Business Magazine. LATINA Style Magazine has a distribution of 150,000 with a readership of 600,000 plus the website receives an average of 200,000 hits a month.

## **Communications and Liaison – Weekly Activity Report**

### **Week of November 6, 2017**

#### **Internal Communications**

##### Employee Email

- Farewell and best wishes (Commissioner Koskinen goodbye to all employees) (Comms)

##### IRS Headlines

- Rollout of Skype for Business will begin soon (IT)
- Treasury Department issues 2017 Employee Awards of Excellence (HCO)
- Use the ERC website before submitting a ticket or calling (HCO)
- Save yourself a call to the Enterprise Service Desk – read this (IT)
- Upgraded Adobe Acrobat tools to be installed soon (IT)

##### Leaders' Alert

- Encourage employees with questions to visit the ERC website first (HCO)

##### Other News

- Department of Justice honors CI, SB/SE and LB&I employees (C&L)

##### Poll Question

- What accounting standards do U.S. government agencies and most larger businesses use to prepare their financial statements? (CFO)

##### Spotlight

- Honoring our heroes (Veterans Day) (EDI)

##### Webbie

- Enter your time in SETR early due to the Veterans Day holiday (HCO)
- Expanded SharePoint Central resources are now easier to navigate and use (IT)

#### **Media Relations**

##### Potential news releases for this week:

- Offshore Voluntary Compliance Initiative (OVCI) update
- “Get Ready” campaign kicks off: How to avoid a refund delay
- Jan. 31 deadline reminder – wage/earnings statements
- IRS offers one-stop resource center to new small businesses

##### Potential releases for coming weeks:

- Get Ready: Save for retirement now; get tax credit later
- Security Summit: “National Tax Security Awareness Week”

#### **National Public Liaison**

Monday Nov. 6 – Tuesday Nov. 7 – Office of Online Services previews online tax professional account at AICPA National Tax Conference. (Exhibit hall booth.) Marriott Marquis, Washington, D.C.

Tuesday Nov. 7, 1:45 pm – W&I Commissioner Corbin, LB&I Commissioner O’Donnell and SBSE Deputy Commissioner Ripperda provide division updates at AICPA National Tax Conference. (Panel discussion.) Marriott Marquis, Washington, D.C.

Tuesday Nov. 7, 3:00 – 5:00 pm – American Bar Association Tax Section annual courtesy meeting. Commissioner Koskinen, Acting Chief Counsel Paul, and IRS executives. Room 2116.

Wednesday Nov. 15, 9 am – 12:30 pm – Internal Revenue Service Advisory Council annual public meeting. Deputy Commissioner Wielobob will greet the Committee and thank members completing their terms. Marriott Wardman Park.

### **Legislative Affairs**

Not IRS Agency Records



### **UPCOMING HEARINGS:**

Currently, there are no hearings scheduled.

Not IRS Agency Records



## **Social Media**

### WEB – Current front page

- Feature card: Estimated Tax (changing Tue. Get Ready)
- Image card: Disaster Relief (changing Tue. Get Ready)
- Non-image card: ITIN (changing Wed. Alerts)
- VIDEO: current: How to Voluntarily Correct the Classification of Your Workers
  - changing Tue. to IRS Small Business Self-Employed Tax Center
  - changing Thu. to Military Tax Tips
- Embedded Tweet: If you're in the [#sharingeconomy](#) & have a separate job, check your tax withholding to avoid unexpected [#IRS](#) issues. <https://go.usa.gov/xn46H>
  - Changing Tue: Disaster relief
  - Changing Thu: efile closing

### TWITTER

- Pinned: Avoid an [#IRS](#) surprise: Adjust your W-4, to make sure the right tax is taken out of your pay throughout the year. <https://go.usa.gov/xn46H>

- Pay as you go: Estimated Taxes, Sharing economy *\*new*
- Get Ready *\*new*
- Small Business Tax Center *\*new*
- ITIN
- Check your withholding
- Tax Forums online
- Protect Your Clients (cards)
- Scams
- Volunteer for VITA/TCE
- #IRSTaxTips
- PTIN renewals/applications for 2018
- Disaster Relief (including wildfires) *\*updated*
- Offshore Voluntary Compliance Initiative (OVCI) update *\*potential*

#### FB TABS (Eng & Spa)

- *Get Ready \*new*
- *Pay as you go \*new*
- Security Summit
- Protect Your Clients (*change card*)
- Tax Scams: Tax Scams / Consumer Alerts
- ITIN Info
- YouTube
  - Current - IRS Withholding Calculator
  - Thu - English FB: Military Tax Tips; Spanish FB: Private Collection of Overdue Taxes
- Disaster Tax Relief
- Charity scams
- Taxpayer Bill of Rights

#### VIDEO TT FRIDAY

- English: Military Tax Tips
- Spanish: Private Collection of Overdue Taxes

### Stakeholder Liaison

**Nov. 6, 2017 Fall Tax Updates, Institutes, Seminars, & Tax Schools.** 10 Locations.  
Estimated Attendees: 1,460

**Nov. 6, 2017 Las Vegas, NV (F2F) H&R Block Franchise Convention**  
Stakeholder: H&R Block. Est. Attendees: 500 **DG**

**Nov. 7, 2017 Fall Tax Updates, Institutes, Seminars, & Tax Schools.** 10 Locations.  
Estimated Attendees: 805

**Nov. 7 & 8, 2017 Arlington VA (F2F) DSA Fall Conference 2017**  
Stakeholder: Direct Selling Association. Est. Attendance: 300

**Nov. 7, 2017 Hoover, AL (F2F) 2017 Alabama Chapter of the NATP Annual State Education Conference and Membership Meeting**

Stakeholder: Alabama NATP. Est. Attendance: 75 **CEC**

**Nov. 7, 2017 Union, NJ (F2F) Annual Federal State Tax Workshop**

Stakeholder: New Jersey Association of Public Accountants. Est. Attendance: 80 **MAR**

**Nov. 7, 2017 Tamarac, FL (F2F) FSEA Broward Chapter CPE Meeting VM**

Stakeholder: FL Society of Enrolled Agents – Broward Chapter. Est. Attendance: 25

**Nov. 8, 2017 Fall Tax Updates, Institutes, Seminars, & Tax Schools. 11 Locations.**

Estimated Attendance: 1,735

**Nov. 8, 2017 Salem, OR (F2F) Oregon Consumer Protection Roundtable**

Stakeholder: Oregon Consumer Protection Roundtable. Est. Attendance: 16 **KH**

**Nov. 8, 2017 State of Delaware (V) Delaware SRMLC**

Stakeholder: Delaware IRS BODS. Est. Attendance: 9 **MAR**

**Nov. 8, 2017 Nationwide (V) The Office of Professional Responsibility: What You Need to Know about Practicing before the IRS (rebroadcast)**

Stakeholder: Tax Practitioners. Est. Attendance: 3,500

**Nov. 8, 2017 Columbia, SC (V) Annual South Carolina Society of Enrolled Agents**

Stakeholder: South Carolina Society of Enrolled Agents. Est. Attendance: 110 **DY**

**Nov. 8, 2017 Costa Mesa, CA (F2F) CalCPA (Orange County) Local, State and Federal Tax Panel Discussion**

Stakeholder: CA CPA – Orange County. Est. Attendance: 50 **DG**

**Nov. 8, 2017 Chesapeake, VA (F2F) How to Deal with Data Breach**

Stakeholder: Virginia Society of CPA's – Tidewater Chapter. Est. Attendance: 375 **DY**

**Nov. 8, 2017 South River, NJ (F2F) IRS Current Messages & Updates**

Stakeholder: New Jersey Association of Public Accountants– Central Jersey Chapter. Est. Attendance: 25 **MAR**

**Nov. 8, 2017 Little Rock, AR (F2F & V) 2017 Arkansas Practitioner Liaison Meeting**

Stakeholder: Arkansas Society of CPA's. Est. Attendance: 80 **CEC**

**Nov. 9, 2017 Fall Tax Updates, Institutes, Seminars, & Tax Schools. 11 Locations.**

Estimated Attendees: 1,520

**Nov. 9, 2017 Rocky Hill, CT (F2F) International Association of Security & Investigative Regulators Annual Conference**

Stakeholder: CT Society of CPA's. Est. Attendance: 70 **MAR**

## **Communications and Liaison – Weekly Activity Report**

### **Week of November 13, 2017**

#### **Internal Communications**

##### **IRS Headlines**

- Resources available to help combat the opioid epidemic (HCO)
- Federal benefits season is open now through December 11 (HCO)
- Give us your feedback on the new Elements of Training newsletter website (HCO)
- If you participate in Leadership Succession Review, complete Stage 4 (HCO)
- Schedule your use-or-lose annual leave (HCO)

##### **Leaders' Alert**

- Encourage employees to use Web Chat, self-help tools and walk-in options for tech assistance (IT)
- Eligible employees will receive performance awards in 2017 (HCO)
- Help employees or colleagues to unlock their LAN account (IT)
- Ensure employees receive pay for the correct number of holiday hours (HCO)
- Follow the guidelines for safeguarding medical confidentiality (EDI)

##### **Poll Question**

- Which business unit provides specialized customer service for Indian Tribal Governments? (EDI)
- What are the major changes in the 2017 Combined Federal Campaign? (AWSS)

##### **Spotlight**

- Take the IRS geography challenge (National Geography Awareness Week) (C&L)
- Fighting back...with laughs (Domestic Violence Awareness Month) (IT)

#### **Media Relations**

Potential news releases for this week:

- Get Ready #2: Saver's credit for retirement
- Registration open: 2018 advance payments of the Health Coverage Tax Credit
- Plan now: Health Flexible Spending Arrangements
- Jan. 31 deadline reminder – wage/earnings statements
- National Tax Security Awareness Week begins 11/27

Potential releases for coming weeks:

- Get Ready #3: Donations may cut tax bill (#Giving Tuesday)
- Get Ready #4: IRS offers free tax help
- Get Ready #5: ITIN renewal reminder
- Get Ready #6: What to do as Dec. 31 approaches
- Get Ready #7: E-file options
- Get Ready #8: Choosing a tax preparer
- IRS offers one-stop resource center to new small businesses
- Offshore Voluntary Compliance Initiative (OVCI) update

#### **National Public Liaison**

Tuesday, Nov. 14, all day – Internal Revenue Service Advisory Council (IRSAC) working meeting. Main IR.

Tuesday, Nov. 14, 2:00 pm – Tax Talk Today live webcast. Darren Guillot, Director Field Collection, joins a panel of speakers on collection topics.

Wednesday, Nov. 15, 9 am-12:15 pm – IRSAC Public Meeting. Deputy Commissioner Kirsten Wielobob attends from 11:15. Marriott Wardman Park.

Thursday, Nov. 16, 9 am-12:00 pm – NPL Practitioner Meeting. Room 2140. Topics include: IRS notices, IRS field employee verification pilot, authentication and filing season update, legislative affairs update.

### **Legislative Affairs**

Not IRS Agency Records



### **UPCOMING HEARINGS:**

Currently, there are no hearings scheduled.

Not IRS Agency Records



### **Social Media**



#### WEB – Current front page

- Feature card: Get Ready
- Image card: Pay As You Go (changing Thu. Saver's Credit)
- Non-image card: Scam Alerts (changing Thu. Pay As You Go)
- VIDEO: current: Military Tax Tips
  - changing Mon. to Need a Payment Plan? Consider Using the Online Payment Agreement Application
  - changing Thu. to IRS Small Business Self-Employed Tax Center
- Embedded Tweet: Some disaster areas qualify for #IRS extension thru Jan. When efile closes mid-Nov, they should file paper returns. <https://go.usa.gov/xn2ma>
  - Changing Thu: beware of scams

#### TWITTER

- Pinned: #GetReady: IRS offers steps you can take now to ensure smooth processing of your taxes in 2018. <http://www.irs.gov/getready> (*Changing Mon.* to #GetReady poll #2: EITC and ACTC)
- Get Ready
- #GetReady Thunderclap promotion *\*new*
- Pay as you go: Estimated Taxes, Sharing economy *\*new/additional*
- Saver's Credit *\*new*
- Transcripts by mail *\*new*
- Health Flexible Spending Arrangements *\*new*
- Jan. 31 deadline reminder *\*new*
- #IRSTaxTips
- ITIN
- Check your withholding
- Tax Forums online
- Protect Your Clients (cards)
- Scams
- PTIN renewals/applications for 2018
- Fall IRS notices *\*potential*
- Disaster Relief (including wildfires) *\*updated*

#### FB TABS (Eng & Spa)

- Get Ready
- Pay as you go *\*new image*
- Security Summit
- Protect Your Clients (*change card*)
- Tax Scams: Tax Scams / Consumer Alerts
- ITIN Info
- Saver's Credit *\*new*
- YouTube
  - Current - Military Tax Tips; Spanish FB: Private Collection of Overdue Taxes
  - Mon: IRS Small Business Self-Employed Tax Center
- Disaster Tax Relief
- Taxpayer Bill of Rights

VIDEO TT FRIDAY  
IRS Small Business Self-Employed Tax Center

### **Stakeholder Liaison**

**77 Events. Estimated Attendees: 12,819**

**Nov. 13, 2017 (F2F) Tax Practitioner Institutes.** 10 Locations.  
Est. Attendance: 1,200

**Nov. 14, 2017 Kansas City, MO (V) Avoiding the Top Tax Mistakes that Small Businesses Make (Spanish)**  
Stakeholder: Hispanic Economic Development Corp. Est. Attendance: 100 CEC

**Nov. 14, 2017 (F2F) Tax Practitioner Institutes.** Locations: 11  
Est. Attendance: 1,426

**Nov. 14, 2017 (F2F) Practitioner Symposiums/Working Together.** Locations: 2.  
Est. Attendance: 550

**Nov. 14, 2017 (F2F) Other Practitioner Meetings/Continuing Ed.** Locations: 5 Est. Attendance: 630

**Nov. 15, 2017 (F2F) Tax Practitioner Institutes.** Locations: 7  
Est. Attendance: 945

**Nov. 15, 2017 New York, NY(F2F) How Government Resource can help grow your business**  
Stakeholder: New York City Taxpayer Advocate. Est. Attendance: 20 MCP

**Nov. 15, 2017 Kansas City, MO (V) Avoiding the Top Tax Mistakes that Small Businesses Make**  
Stakeholder: KC BIZCARE. Est. Attendance: 100 CEC

**Nov. 15, 2017 New York, NY (V) NY Area IMRS Monthly Discussion.**  
Stakeholder: NY, NH and MA- Mass Society of Enrolled Agents. Est. Attendance: 25 MCP

**Nov. 15, 2017 (F2F) Practitioner Symposiums/Working Together.** Locations: 2  
Estimated Attendance: 750

**Nov. 15, 2017 Anchorage, AK (V) Alaska Small Business Forum**  
Stakeholders: Alaska Small Business Development Center. Estimated Attendance: 20  
**May be rescheduled due to SL Jury Duty KH**

**Nov. 16, 2017 (F2F & V) Other Practitioner Meetings/Continuing Ed.** Locations: 7 Est.  
Attendance: 666

**Nov. 16, 2017 (F2F) Tax Practitioner Institutes.** Locations: 11  
Est. Attendance: 1,160

**Nov. 16, 2017 (V) Nationwide Annual Filing Season Program Webinar**  
Est. Attendance: 4,000 KD for DG

**Nov. 16, 2017 (F2F) Albuquerque, NM Albuquerque APA Year End State Wide Mtg.**  
Stakeholder: American Payroll Association – NM. Est. Attendance: 30 **VM**

**Nov. 17, 2017 (F2F) Tax Practitioner Institutes.** Locations: 3  
Est. Attendance: 280

**Nov. 17, 2017 (F2F) Practitioner Symposiums/Working Together.** Locations: 1  
Estimated Attendance: 400 **KH**

**Nov. 17, 2017 (F2F) Other Practitioner Meetings/Continuing Ed.** Locations: 4  
Est. Attendance: 295

**Nov. 17, 2017 (F2F) San Diego, CA 2017 Latina Style Business Series.**  
Stakeholder: Latina Style Magazine. Est. Attendance: 200 **KD for DG**

**Nov. 17, 2017 (F2F) Louisville, KY 2017 Payroll Professionals of Kentuckiana Annual Mtg.**  
Stakeholder: Payroll Professionals of Kentuckiana. Est. Attendance: 45 **CEC**

**Nov. 17, 2017 (F2F & V) Greensboro, NC The Annual North Carolina Association of Certified Public Accountants (NCACPA) and North Carolina BAR (NCBAR) Practitioner Liaison Meeting**  
Stakeholder: The North Carolina State Bar Association. Est. Attendance: 45 **DY**

**Nov. 18, 2017 (F2F) Houston, TX 2017 Houston Regional Seminar.** Stakeholder: Latino Tax Professionals Association. Est. Attendance: 100 **KD for DG**

## **Communications and Liaison – Weekly Activity Report**

### **Week of November 20, 2017**

#### **Internal Communications**

##### Headlines

- Use the Password Management tool to unlock your LAN account (IT)
- Use self-help tools, Web Chat, Walk-In options for tech assistance (IT)
- Emergency Leave Transfer Programs for Hurricanes Harvey and Maria extended to December 15 (HCO)
- Video guidance now includes Skype, cell phone use (C&L)
- Update your mailing address to receive your W-2 on time (HCO)

##### Leaders' Alert

- Know the guidelines for approving time for Equal Employment Opportunity complaints (EDI)
- Make sure you consider internal control objectives when you plan (CFO)
- Hurricanes Harvey and Maria Emergency Leave Transfer Programs extended to December 15 (HCO)
- Guidance for approving religious compensatory time (HCO)
- You play a critical role in creating safe workplace environments (AWSS)

##### Poll Question

- What is the Workplace Computing Strategy? (IT)

##### Spotlight

- Take the IRS geography challenge (National Geography Awareness Week) (C&L)
- Foods that grew on us (Multiple)

##### Webbies

- Review your Statement of Earnings and Leave for accuracy (HCO)
- Repay salary overpayments by 12/11 (HCO)
- Be prepared: Don't get locked out over the holiday (IT)
- Reminder: 12/1 is deadline to tag emails you need to keep longer than 20 years (PGLD)

#### **Media Relations**

##### Potential news releases for this week:

- Get Ready #3: Donations may cut tax bill (#Giving Tuesday)
- IRS offers one-stop resource center to new small businesses

##### Potential releases for coming weeks:

- NTSA: Online Security: Seven Steps for Safety
- NTSA: Don't Take the Bait; Avoid Phishing Emails by Data Thieves
- NTSA: Victim of a Data Breach Should Consider These Steps to Protect Your Tax Information
- NTSA: Employers, Payroll Officials: Avoid the W-2 Email Scam
- NTSA: Small Businesses: Be Alert to Identity Theft
- Get Ready #4: IRS offers free tax help
- Get Ready #5: ITIN renewal reminder

## National Public Liaison

### Legislative Affairs

#### **UPCOMING MEETING:**

Currently, there are no meetings scheduled.

#### **UPCOMING HEARINGS:**

Currently, there are no hearings scheduled.

Not IRS Agency Records



## Social Media

### Stakeholder Liaison

**15 Events – Est. Attendees: 1,522**

**Nov. 20, 2017 (F2F) Tax Practitioner Institutes.** 8 Locations. Est. Attendees: 1,050

**Nov. 20, 2017 Philadelphia, PA (V) PICPA Federal Tax Committee Meeting** Stakeholder:  
Pennsylvania Institute of Certified Public Accountants (PICPA) Federal Tax Committee. Est.  
Attendance: 35 **MAR**

**Nov. 21, 2017 Oakland, CA (F2F) 2017 Tax Day.** Stakeholder: Natl. Association of Black Accountants. Est. Attendance: 45 **KD for DG**

**Nov. 21, 2017 Schaumburg, IL (F2F) Illinois Fed/State Update Seminar**

Stakeholder: Independent Accountants Assoc. of Illinois (IAAI) and Illinois Department of Revenue 5 Est. Attendance: 100 **DB for CEC**

**Nov. 21, 2017 Abington, PA (F2F) Penn State (Abington) CPA Continuing Education Series:**

**Annual IRS Updates.** Stakeholder: Penn State (Abington) CPE/CLE Series. Est. Attendance: 100 **MAR**

**Nov. 21, 2017 North Charleston, SC (F2F) 2017 Annual Small Business and Farm Income Tax**

**Course.** Stakeholder: Clemson University, School of Agricultural, Forest and Environmental Sciences. Est. Attendance: 140 **DY**

**Nov. 22, 2017 Philadelphia, PA (V) Eastern PA Stakeholder Relationship Management Local**

**Council Meetings (SRMLC) - Fall, 2017** Stakeholder: Philadelphia IRS BOD's. Est. Attendance: 12 **MAR**

**Nov. 22, 2017 Sioux Falls, SD (F2F) South Dakota State University Tax Update.**

Stakeholder: Univ.- SD - SDSU TPI Continuing & Extended Ed. Est. Attendance: 40 **kdw**

## **Communications and Liaison – Weekly Activity Report**

### **Week of November 27, 2017**

#### **Internal Communications**

##### IRS Headlines

- New IRS Learning Portal is the one-stop shop for the courses you need (HCO)
- The Office of Servicewide Penalties announces their FY 2018 penalty discussion session schedule (SBSE)
- IRS launches National Tax Security Awareness Week (PGLD)
- You may request time off for religious observances (HCO)
- Choose the paperless option for your W-2 and 1095-C (HCO)

##### Leaders' Alert

- Know your responsibilities when your employees inadvertently access taxpayer data (PGLD)
- Eligible employees will receive performance awards in 2017 (HCO)
- Ensure your employees know about federal benefits open season (HCO)
- Commissioner grants two hours of holiday leave (HCO)

##### Poll Question

- Flexible Spending Accounts help pay for what type of expenses? (HCO)
- What should you do when working with sensitive information while teleworking? (PGLD)

##### Spotlight

- Giving Tuesday (C&L)
- Saying hello or goodbye (retirement) (C&L)

##### Daily News

- Eligible employees will receive performance awards in 2017 (HCO)
- Filing season start date hasn't been announced (W&I)
- International ethnocentric perspective on tax compliance (TAS)
- Employees can help improve indoor air quality at work (AWSS)

#### **Media Relations**

##### Potential news releases for this week:

- NTSA: Online Security: Seven Steps for Safety
- NTSA: Don't Take the Bait; Avoid Phishing Emails by Data Thieves
- NTSA: Victim of a Data Breach Should Consider These Steps to Protect Your Tax Information
- NTSA: Employers, Payroll Officials: Avoid the W-2 Email Scam
- NTSA: Small Businesses: Be Alert to Identity Theft
- Get Ready #4: IRS offers free tax help

##### Potential releases for coming weeks:

- Get Ready #5: ITIN renewal reminder
- Get Ready #6: What to do as Dec. 31 approaches
- Get Ready #7: E-file options
- Get Ready #8: Choosing a tax preparer

## **National Public Liaison**

### **Legislative Affairs**

#### **UPCOMING MEETING:**

Currently, there are no meetings scheduled.

#### **UPCOMING HEARINGS:**

Currently, there are no hearings scheduled.

Not IRS Agency Records



### **Social Media**

WEB – Current front page

- Feature card: Get Ready (changing Mon to Tax Security)
- Image card: Pay As You Go (changing Mon. Get Ready)
- Non-image card: Scam Alerts (changing Thu. Pay As You Go)
- VIDEO: current: IRS Small Business Self-Employed Tax Center



- changing Mon. to Charitable Contributions
- changing Wed. to Protect Your Clients; Protect Yourself
- Embedded Tweet: Donating to a disaster recovery effort? A local shelter? This [#GivingTuesday](#), [#IRS](#) has tips to find tax-deductible options: <https://go.usa.gov/xnKBY> 2:23 PM - Nov 22, 2017
  - Changing Wed: Throughout National [#TaxSecurity](#) Awareness Week, [#IRS](#) offers tips to keep you safe online. <http://www.irs.gov/securitysummit>

#### TWITTER

- Pinned: Throughout National [#TaxSecurity](#) Awareness Week, [#IRS](#) offers tips to keep you safe online. <http://www.irs.gov/securitysummit>
- NTSAW – follow daily schedule *\*new*
- Get Ready
- Tax Calendar *\*new*
- Form 944 *\*new*
- [#GivingTuesday](#)
- [#GetReady](#) Thunderclap promotion
- Pay as you go: Estimated Taxes, Sharing economy
- Saver's Credit
- Transcripts by mail *\*new*
- Health Flexible Spending Arrangements *\*new*
- Jan. 31 deadline reminder *\*new*
- [#IRSTaxTips](#)
- ITIN
- Check your withholding
- Protect Your Clients (cards)
- PTIN renewals/applications for 2018
- Fall IRS notices *\*potential*
- Disaster Relief (including wildfires)

#### FB TABS (Eng & Spa)

- NTSAW: Online Security *\*new*
- NTSAW: Recognize Phishing Scams *\*new*
- NTSAW: Data Breaches *\*new*
- NTSAW: W-2 Email Scam *\*new*
- NTSAW: Small Businesses *\*new*
- Get Ready
- Pay as you go *\*new image (seasonal job)*
- ITIN Info
- YouTube
  - Current - ASL: IRS Small Business Self-Employed Tax Center; Spanish FB: VITA volunteers
  - Mon: Charitable Contributions
  - Wed. to Protect Your Clients; Protect Yourself
- Taxpayer Bill of Rights

VIDEO TT FRIDAY

- Protect Your Clients; Protect Yourself

**Stakeholder Liaison**

**58 Events – Est. Attendees: 7,260**

**Nov. 27, 2017 (F2F) Tax Practitioner Institutes.** 8 Locations. Est. Attendees: 890

**Nov. 28, 2017 (F2F) Tax Practitioner Institutes.** 9 Locations. Est. Attendees: 1,275

**Nov. 28, 2017 (F2F) Other Practitioner Meetings/Continuing Ed.** 7 Locations: Est. Attendance: 505

**Nov. 28, 2017 (F2F) Boise, ID (V& F2F) Idaho Practitioner Liaison Meeting**  
Stakeholder: Idaho Practitioner Organizations. Est. Attendees: 20 KH

**Nov. 29, 2017 (F2F) Tax Practitioner Institutes.** 10 Locations. Est. Attendees: 1,615

**Nov. 29, 2017 Arlington, TX (F2F) Texas Society of CPA's CPE Exposition.**  
Stakeholder: Texas Society of CPA's. Est. Attendees: 275 VM for GT

**Nov. 30, 2017 (F2F) Tax Practitioner Institutes.** 13 Locations. Est. Attendees: 1,685

**Nov. 30, 2017 Providence, RI (F2F) Federal Tax Updates**  
Stakeholder: CPE Associates. Est. Attendees: 75 MAR

**Nov. 30, 2017 Nashville, TN (V) TN Practitioner Liaison Meeting**  
Stakeholder: TN Practitioner Organizations. Est. Attendees: 50 CEC

**Dec. 1, 2017 (F2F) Tax Practitioner Institutes.** 3 Locations. Est. Attendees: 340

**Dec. 1, 2017 (F2F) Other Practitioner Meetings/Continuing Ed.** 3 Locations: Est. Attendance: 440

**Dec. 1, 2017 (V) Issue Resolution Management System First Friday**  
Stakeholders: Practitioner organizations from TX, AZ, NM, GA, & FL. Est. Attendees: 20 VM for GT

**Dec. 1, 2017 Salem, OR (F2F) Oregon Dept. of Rev. Practitioner Liaison Meeting**  
Stakeholder: Oregon Dept. of Revenue. Est. Attendees: 70 KH

## **Communications and Liaison – Weekly Activity Report**

### **Week of December 4, 2017**

#### **Internal Communications**

##### Headlines

- Reminder: IRS provides support for nursing mothers (HCO)
- Can't use your use-or-lose annual leave? Someone else can. (HCO)
- Give to the Combined Federal Campaign via the new donor pledge website (AWSS)
- IRS implements new email retention policy (Multiple)
- Visit the Office 365 Resource Center for Skype for Business tips and training (IT)

##### Leaders' Alert

- New guidance for selecting officials considering external applicants (HCO)
- HRConnect reminders help manage temporary personnel actions (HCO)
- Encourage your employees to donate use-or-lose annual leave they can't schedule (HCO)

##### Poll Question

- IT4U's New Initiatives section links you to current information on which of the following resources? (IT)

##### Spotlight

- This is your brain on meditation (De-stressing during the holidays) (C&L)

##### Webbies

- 'Tis the season to be cyber safe (IT)
- Reminder: Join veterans town hall meeting 12/12 (HCO)
- Take an ELMS course to learn how to request a pocket commission (AWSS)
- Happy holidays (message to all employees from acting commissioner) (Comm)
- Sign up for EEFax today; most IRS fax machines retiring by the end of 2017 (IT)
- "Get Ready" Campaign gets help from Thunderclap (W&I)
- Operations Support completes realignment, effective 12/10 (DCOS)

#### **Media Relations**

##### Potential news releases for this week:

- Get Ready #6: What to do as Dec. 31 approaches
- 2018 Standard mileage rates for business, medical and moving

##### Potential releases for coming weeks:

- Get Ready #7: E-file options
- Get Ready #8: Choosing a tax preparer

#### **National Public Liaison**

Wednesday, Dec. 13, 1 p.m. ET – Monthly Outreach Priorities Conference Call.

#### **Legislative Affairs**

Not IRS Agency Records

**UPCOMING HEARINGS:**

Currently, there are no hearings scheduled.

**UPCOMING DISTRICT CONGRESSIONAL LIAISON BRANCH MEETINGS:**

Currently, there are no District Congressional Liaison meetings scheduled.

**Social Media**

**Stakeholder Liaison**

**42 Events – Est. Attendees: 14,788**

**Dec. 11, 2017 (F2F) Tax Practitioner Institutes.** 6 Locations. Est. Attendees: 650

**Dec. 11, 2017 (F2F) Other Practitioner Meetings/Continuing Ed.** 3 Locations: Est. Attendance: 360

**Dec. 11, 2017 (V) Bronx, NY. National Tax Security and Tax Law Updates**

Stakeholders: Bronxnet TV (media outlet) cleared and approved by Media Relations.  
Attendance: 3 in person with viewership of 259,000. **MCP**

**Dec. 12, 2017 (F2F) Tax Practitioner Institutes.** 5 Locations. Est. Attendance: 1,365

**Dec. 12, 2017 (F2F) Other Practitioner Meetings/Continuing Ed.** 5 Locations: Est. Attendance: 590

**Dec. 12, 2017 (F2F) Kansas City, KS. Resource Partner Meeting**

Stakeholders: KC Small Business Development Technology Center, Hispanic Chamber of Commerce, Kansas City Public Library Business Center, KC Business Incubator.  
Est. Attendance: 30 **CEC**

**Dec. 13, 2017 (F2F) Tax Practitioner Institutes.** 5 Locations: Est. Attendance: 475

**Dec. 13, 2017 (F2F) Other Practitioner Meetings/Continuing Ed.** 3 Locations: Est. Attendance: 405

**Dec. 13, 2017 (F2F) Chicago, IL. Illinois PLM**

Stakeholder: Chicago Bar Association, DuPage County Bar Assoc., Federal Bar Assoc., Illinois CPA Society, Illinois CPA Society. Est. Attendance: 45 **CEC**

**Dec. 14, 2017 (F2F) Tax Practitioner Institutes.** 2 Locations: Est. Attendance: 265

**Dec. 14, 2017 (F2F) Other Practitioner Meetings/Continuing Ed.** 3 Locations: Est. Attendance: 1,605

**Dec. 14, 2017 (V) Oakland, CA. Issue Management Resolution System Meeting**

Stakeholders: CA Society of EA's East Bay Chapter, Mission Society of Enrolled Agents, Orange County Chapter, CalCPA San Inland Empire, CSEA San Diego Chapter. Est. Attendees: 15 **KD for DG**

**Dec. 14, 2017 (V) Racing Towards Year End National Webinar**

Est. Attendance: 1,000 **KD for DG**

**Dec. 14, 2017 (F2F) Dallas, TX. Dallas APA Monthly Meeting**

Stakeholder: Dallas Chapter APA. Est. Attendance: 95 **VM for GT**

## **Communications and Liaison – Weekly Activity Report**

### **Week of December 11, 2017**

#### **Internal Communications**

##### Headlines

- Reminder: IRS provides support for nursing mothers (HCO)
- Can't use your use-or-lose annual leave? Someone else can. (HCO)
- Give to the Combined Federal Campaign via the new donor pledge website (AWSS)
- IRS implements new email retention policy (Multiple)
- Visit the Office 365 Resource Center for Skype for Business tips and training (IT)

##### Leaders' Alert

- New guidance for selecting officials considering external applicants (HCO)
- HRConnect reminders help manage temporary personnel actions (HCO)
- Encourage your employees to donate use-or-lose annual leave they can't schedule (HCO)

##### Poll Question

- IT4U's New Initiatives section links you to current information on which of the following resources? (IT)

##### Spotlight

- This is your brain on meditation (De-stressing during the holidays) (C&L)

##### Webbies

- 'Tis the season to be cyber safe (IT)
- Reminder: Join veterans town hall meeting 12/12 (HCO)
- Take an ELMS course to learn how to request a pocket commission (AWSS)
- Happy holidays (message to all employees from acting commissioner) (Comm)
- Sign up for EEFax today; most IRS fax machines retiring by the end of 2017 (IT)
- "Get Ready" Campaign gets help from Thunderclap (W&I)
- Operations Support completes realignment, effective 12/10 (DCOS)

#### **Media Relations**

##### Potential news releases for this week:

- Get Ready #6: What to do as Dec. 31 approaches
- 2018 Standard mileage rates for business, medical and moving

##### Potential releases for coming weeks:

- Get Ready #7: E-file options
- Get Ready #8: Choosing a tax preparer

#### **National Public Liaison**

Wednesday, Dec. 13, 1 p.m. ET – Monthly Outreach Priorities Conference Call.

#### **Legislative Affairs**

Not IRS Agency Records

**UPCOMING HEARINGS:**

Currently, there are no hearings scheduled.

**UPCOMING DISTRICT CONGRESSIONAL LIAISON BRANCH MEETINGS:**

Currently, there are no District Congressional Liaison meetings scheduled.

**Social Media**

**Stakeholder Liaison**

**42 Events – Est. Attendees: 14,788**

**Dec. 11, 2017 (F2F) Tax Practitioner Institutes.** 6 Locations. Est. Attendees: 650

**Dec. 11, 2017 (F2F) Other Practitioner Meetings/Continuing Ed.** 3 Locations: Est. Attendance: 360

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**Dec. 12, 2017 (F2F) Other Practitioner Meetings/Continuing Ed.** 5 Locations: Est. Attendance: 590

**Dec. 12, 2017 (F2F) Kansas City, KS. Resource Partner Meeting**

Stakeholders: KC Small Business Development Technology Center, Hispanic Chamber of Commerce, Kansas City Public Library Business Center, KC Business Incubator.  
Est. Attendance: 30 **CEC**

**Dec. 13, 2017 (F2F) Tax Practitioner Institutes.** 5 Locations: Est. Attendance: 475

**Dec. 13, 2017 (F2F) Other Practitioner Meetings/Continuing Ed.** 3 Locations: Est. Attendance: 405

**Dec. 13, 2017 (F2F) Chicago, IL. Illinois PLM**

Stakeholder: Chicago Bar Association, DuPage County Bar Assoc., Federal Bar Assoc., Illinois CPA Society, Illinois CPA Society. Est. Attendance: 45 **CEC**

**Dec. 14, 2017 (F2F) Tax Practitioner Institutes.** 2 Locations: Est. Attendance: 265

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**Dec. 14, 2017 (V) Oakland, CA. Issue Management Resolution System Meeting**

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**Dec. 14, 2017 (V) Racing Towards Year End National Webinar**

Est. Attendance: 1,000 **KD for DG**

**Dec. 14, 2017 (F2F) Dallas, TX. Dallas APA Monthly Meeting**

Stakeholder: Dallas Chapter APA. Est. Attendance: 95 **VM for GT**



## **Communications and Liaison – Weekly Activity Report**

### **Week of December 18, 2017**

#### **Internal Communications**

##### IRS Headlines

- Make calls, check voicemail from your computer using the Cisco Jabber softphone (IT)
- Watch new time and attendance corrections job aid in TAPS/SETR ViewTube library (HCO)
- The Leave Bank open season now available through January 19 (HCO)
- Take the new Employee Tax Compliance briefing by January 31 (HCO)
- Report interest on back pay on your income tax return (HCO)
- Use Exception Time Reporting to post your time automatically (HCO)

##### Leaders' Alert

- Respond to employee pseudonym requests within three workdays (PGLD)
- Hold requests to restore annual leave until Pay Period 1 of 2018 (HCO)
- Talk with your employees about the retention standard (HCO)
- Review tips for accurate time and attendance processing for retiring employees (HCO)

##### Other News

- IRS execs among 2016, 2017 Presidential Rank Award winners (Multiple)

##### Poll Question

- What does CRU stand for? (EDI)
- What's your favorite part of a holiday feast? (C&L)

##### Spotlight

- 'Tis the season for hot drinks (Multiple)

##### Daily News

- It's easier than ever to return unneeded computers and other IT equipment (IT)
- Upgraded Adobe tools to be deployed soon, starting with limited number of users (IT)
- Review guidance when posting time for upcoming holidays (AWSS)
- Attend special Skype call-in and SABA training events in December and January (IT)
- Stay connected to the network to ensure timely IT updates (IT)
- Know when your federal health benefits open season changes take effect (HCO)

#### **Media Relations**

##### Potential news releases for this week:

- Get Ready #7: E-file options
- PTIN renewal/application – deadline reminder

##### Potential releases for coming weeks:

- Get Ready #8: Choosing a tax preparer
- Passport reminder for taxpayers who owe

#### **National Public Liaison**

#### **Legislative Affairs**

#### **UPCOMING MEETINGS:**

Not IRS Agency Records



#### **UPCOMING HEARINGS:**

Currently, there are no hearings scheduled.

#### **UPCOMING DISTRICT CONGRESSIONAL LIAISON BRANCH MEETINGS:**

Currently, there are no District Congressional Liaison meetings scheduled.

#### **Social Media**

#### **Stakeholder Liaison**

##### **4 Events – Est. Attendees: 235**

##### **Dec. 18, 2017 (V & F2F) Albuquerque, NM. New Mexico PLM**

Stakeholder: New Mexico Society of CPA's. Est. Attendance: 30 **VM for GT**

##### **Dec. 18, 2017 (V) Grand Rapids, Mi. Tax Practitioner Institute**

Stakeholder: University of MI. Est. Attendance: 80 **KW**

##### **Dec. 19, 2017 (F2F) Providence, RI. Annual Tax Forum**

Stakeholder: Rhode Island Society of CPA's Est. Attendance: 75 **MAR**

##### **Dec. 19, 2017 (F2F) Anaheim, CA. CSEA Orange County Chapter Meeting**

Stakeholder: CA Society of Enrolled Agents. Est. Attendance: 50 **KD for DG**

## **Communications and Liaison – Weekly Activity Report**

### **Week of January 8, 2018**

#### **Internal Communications**

##### **IRS Headlines**

- Make calls, check voicemail from your computer using the Cisco Jabber softphone (IT)
- Records Radar: Email retention explained (PGLD)
- Include contact information on your OS GetServices tickets (HCO)
- Apply for consideration to Voluntary Relocation Program by January 23 (HCO)
- Reminder: Follow the new receipt and acceptance procedures for procurement actions (CFO)
- New Self-Help Online Tutorials site offers more than 100 instructional videos (HCO)

##### **Leaders' Alert**

- Creating an inclusive workforce for individuals with disabilities (EDI)
- 2018 performance-based increase approved (HCO)
- New self-service process for performance and career service award certificates (HCO)

##### **Poll Question**

- How many states have streets named for Martin Luther King, Jr? (W&I)

##### **Spotlight**

- Serving others (National Martin Luther King Day of Service) (Multiple)

##### **Daily News**

- IRS Source set to replace IRWeb in 2018 (C&L)
- Been away? Welcome back: Catch up with what's been going on in the IRWeb News Center. (C&L)
- Track your leave with the 2018 automated leave record (HCO)
- Pay rates for 2018 to include a 1.9 percent increase (HCO)

#### **Media Relations**

Potential news releases for this week:

- New IRSAC members

Potential releases for coming weeks:

- New withholding tables
- Freefile now open
- EITC Awareness Day
- Tax return processing begins

#### **National Public Liaison**

Tuesday Jan. 9, Wednesday Jan. 10 – Electronic Tax Administration Advisory Committee working session. Main IR, Room 2140.

Wednesday Jan. 10, 1 p.m. – Outreach Priorities Conference Call.

#### **Legislative Affairs**

##### **UPCOMING MEETINGS:**

Currently, there are no meetings scheduled.

#### **UPCOMING HEARINGS:**

Currently, there are no hearings scheduled.

#### **UPCOMING DISTRICT CONGRESSIONAL LIAISON BRANCH MEETINGS:**

Currently, there are no District Congressional Liaison meetings scheduled.

#### **Social Media**

#### **Stakeholder Liaison**

**26 Events – Est. Attendees: 2,533**

**Jan. 8, 2018 (F2F) Deerfield Beach, FL. FSEA Annual Conference**

Stakeholder: Florida Society of Enrolled Agents. Est. Attendance: 200. **VM for GT**

**Jan. 9, 2018 (F2F) Sugarland, TX. Tax Expo**

Stakeholder: Houston CPA Society. Est. Attendance: 250. **VM for GT**

**Jan. 9, 2018 (F2F) Garden Grove, CA. 2018 IRS/CSEA Practitioner Seminar**

Stakeholder: CSEA Orange County Chapter. Est. Attendance: 250. **KD for DG**

**Jan. 10, 2018 (F2F) Charlotte, NC. BSA/AML Conference**

Stakeholder: Carolina's Credit Union League. Est. Attendance: 100 **DY**

**Jan. 10, 2018 (F2F) Other Practitioner Meetings/Continuing Education (2)**

Locations: NJ & MN. Est. Attendance: 75

**Jan. 10, 2018 (F2F & V) Practitioner Liaison Meetings (4) KH**

Locations: CT, ME, IL, & OR. Est. Attendance: 98

**Jan. 10, 2018 (F2F) San Diego, CA. 2018 IRS/CSEA Practitioner Seminar**

Stakeholder: CSEA San Diego Chapter. Est. Attendance: 150 **KD for DG**

**Jan. 11, 2018 (F2F) Other Practitioner Meetings/Continuing Education (3)**

Locations: NJ, CA, VA. Est. Attendance: 170

**Jan. 11, 2018 (V) Hartford, CT. Vermont Practitioner Liaison Meeting**

Stakeholders: VT CPA's, VT NATP, VT Practicing Accountants, VT Society of EA's, VT Bar Assoc. and Green Mountain Payroll Assoc. Est. Attendance: 25 **MAR**

**Jan. 11, 2018 (F2F & V) Practitioner Symposiums & Working Togethers (2)**

Locations: CA & WV. Est. Attendance: 300

**Jan. 11, 2018 (F2F) Sterling Heights, MI. Tax Practitioner Institute**

Stakeholder: Univ. of MI. Est. Attendance: 120 **JHL for KDW**

**Jan. 12, 2018 (V) Dallas, TX. First Friday IMRS Call**

Stakeholders: Society of CPA's (AZ, TX, NM), Society of EA's (AZ, TX, NM), AZ Society of Practicing Accountants, NATP (TX, NM, AZ), State Bar (AZ, TX), Texas Assoc. of Financial and Tax Specialist.  
Est. Attendance: 20 **VM for GT**

**Jan. 12, 2018 (F2F) Other Practitioner Meetings/Continuing Education (4)**

Locations: FL, ME, PA, & CA. Est. Attendance: 425

**Jan. 12, 2018 (V) Oklahoma City, OK. Oklahoma Practitioner Liaison Meeting**

Stakeholders: OK Bar Association, OK Society of EA's and OK Society of Accountants.  
Est. Attendance: 40 **CEC**

**Jan. 12, 2018 (F2F) Burbank, CA. 2018 IRS/CSEA Practitioner Seminar**

Stakeholder: CSEA San Gabriel Valley Chapter. Est. Attendance: 250 **KD for DG**

**Jan. 12, 2018 (F2F) Findley, OH. 41<sup>st</sup> Annual Income Tax School**

Stakeholder: Univ. of Findley. Est. Attendance: 60 **JHL for KDW**

**Communications and Liaison – Weekly Activity Report**  
**Week of January 29, 2018**

**Internal Communications**

IRS Headlines

- Credit card payments are no longer accepted on Pay.gov website (HCO)
- Emergency Leave Transfer Program donation period for Hurricane Maria in Puerto Rico extended to March 30 (HCO)
- Watch the new job aid designed for those ready or planning to retire (HCO)
- Use the new Verification Code from your Form W-2 when electronically filing your tax return (W&I, IT)

Leaders' Alert

- Knowing risk appetite will help you make better decisions (Risk)
- The IRS still uses SHIMS to submit Worker Compensation Claims for now (FMSS)
- LA- XR 2018 class announcement (HCO)

Poll Question

- Which office was required to review the National Taxpayer Advocate's 2017 Annual Report before it was submitted to Congress? (TAS)

Spotlight

- Helping a neighbor in need (C&L, SBSE)

Daily News

- Visit IT4U to access technology information and resources (IT)
- IRS: Special rules help many with disabilities qualify for Earned Income Tax Credit (W&I)

**Media Relations**

Potential news releases for this week:

- Tax return processing begins
- Employers -- Jan. 31 deadline for W-2s

Potential releases for coming weeks:

- New IRPAC members announced
- Common refund questions/myths
- Dirty Dozen series
- Tax time guide series

**National Public Liaison**

**Legislative Affairs**

Not IRS Agency Records



### **UPCOMING HEARINGS:**

On Tuesday, February 13, 2018, a hearing is scheduled to be held before the Senate Finance Committee on the IRS budget. The Committee is asking for the Secretary to testify during the morning, followed by the Acting Commissioner in the afternoon; time and location TBD.

Witnesses: Dave Kautter, Acting Commissioner is scheduled to testify.

### **UPCOMING DISTRICT CONGRESSIONAL LIAISON BRANCH MEETINGS:**

Currently, there are no meetings scheduled.

### **Social Media**

### **Stakeholder Liaison**

#### **7 Events – Est. Attendees: 3,172**

##### **Jan. 30, 2018 (F2F) Far Rockaway, NY. Tax Day & EITC Awareness**

Stakeholder: NYC Taxpayer Advocate, Council Member Joseph Borelli, IRS TAS

Est. Attendance: 60. **DY**

##### **Jan. 30, 2018 (V) MA & NH, Practitioner Liaison Meeting**

Stakeholder: MA & NH Practitioner Organizations. Est. Attendance: 30. **DY**

##### **Jan. 31, 2018 (V) Nationwide, Understanding Refundable Credits Webinar**

Est. Attendance: 3,000

##### **Feb. 1, 2018 (V) Nationwide, Federal Trade Commission Webinar.**

Est. Attendance: 3,000

##### **Feb. 1, 2018 (F2F) Jackson, MS. Practitioner Liaison Meeting**

Stakeholder: MS CPA Society. Est. Attendance: 35 **CEC**

##### **Feb. 1, 2018 (V) Bloomington, MN. IMRS Call**

Stakeholder: Tax professional organizations in MN, ND, SD, MT, IA and WI. Est. Attendance: 20

##### **Feb. 1, 2018 (F2F) Sacramento, CA Small Business Forum**

Stakeholder: Sacramento County Department of Human Assistance, SBA, Est.

Attendance: 25

##### **Feb. 2, 2018 (V) Dallas, TX. First Friday – IMRS Call**

Stakeholder: Society of CPA's (AZ, TX, NM, GA), Society of EA's (AZ, TX, NM), AZ Society of Practicing Accountants, NATP (TX, NM, AZ, FL), State Bar (AZ, TX), Texas Assoc. of Financial and Tax Specialist (TAFTS), Taxpayer Advocacy Panel (TAP),  
Est. Attendance: 27



## **Communications and Liaison – Weekly Activity Report**

### **Week of February 5, 2018**

#### **Internal Communications**

##### IRS Headlines

- Credit card payments are no longer accepted on Pay.gov website (HCO)
- Emergency Leave Transfer Program donation period for Hurricane Maria in Puerto Rico extended to March 30 (HCO)
- Watch the new job aid designed for those ready or planning to retire (HCO)
- Use the new Verification Code from your Form W-2 when electronically filing your tax return (W&I, IT)

##### Leaders' Alert

- Knowing risk appetite will help you make better decisions (Risk)
- The IRS still uses SHIMS to submit Worker Compensation Claims for now (FMSS)
- LA- XR 2018 class announcement (HCO)

##### Poll Question

- Which office was required to review the National Taxpayer Advocate's 2017 Annual Report before it was submitted to Congress? (TAS)

##### Spotlight

- Helping a neighbor in need (C&L, SBSE)

##### Daily News

- Visit IT4U to access technology information and resources (IT)
- IRS: Special rules help many with disabilities qualify for Earned Income Tax Credit (W&I)

#### **Media Relations**

##### Potential news releases for this week:

- Common refund questions/myths
- ITIN renewal reminder
- New IRPAC members

##### Potential releases for coming weeks:

- "Avoid the rush" series
- Dirty Dozen series
- Tax time guide series
- March 1 tax deadline—farmers and fishermen
- SOI winter bulletin available
- Unclaimed refunds

#### **National Public Liaison**

Tuesday, Feb. 6 12:30-2:00 pm – Tax Reform Roundtable, International and Corporate Issues. 3313.

Tuesday, Feb. 6 3:00-5:00 pm – Tax Reform Roundtable, Small Business and Pass-Through Entities. 3313.

Wednesday, Feb. 7 9:00-11:00 am – Tax Reform Roundtable, Individual Income Tax Changes, Income & Tax Credits. 3313.

Wednesday, Feb. 7 1:00-2:00 pm – Tax Reform Roundtable, Individual Income Tax Changes, Withholding. 3313.

### **Legislative Affairs**

Not IRS Agency Records



#### **UPCOMING HEARINGS:**

On Wednesday, February 14, 2018, a hearing is scheduled to be held before the Senate Finance Committee on the IRS budget. The Committee is asking for the Secretary to testify during the morning, followed by the Acting Commissioner in the afternoon; time and location TBD. Witnesses: Dave Kautter, Acting Commissioner is scheduled to testify.

#### **UPCOMING DISTRICT CONGRESSIONAL LIAISON BRANCH MEETINGS:**

Currently, there are no meetings scheduled.

### **Social Media**

#### **TWITTER**

- Pinned: NEW SCAM: Criminals file fraudulent [#IRS](#) returns and later ask taxpayers to hand over tax refunds supposedly issued in error.  
<https://go.usa.gov/xnAZB> [#TaxSecurity](#)
- VITA / TCE
- Payments
- Free File
- Filing Season (/account, /help, /refunds)
- [#IRSTaxTips](#)
- ITIN renewals
- Protect Your Clients (cards)

- Scams
- W-2 data loss reporting
- Web first *\*potential*

#### POTENTIAL NEW YOUTUBE VIDEOS

- Estimated Tax Payments
- EITC get it right
- IRS Letter CP2000
- IRS tax help for people with disabilities
- When will I get my refund
- Help for Taxpayers

#### FB TABS (Eng & Spa)

- EITC
- VITA
- Pay as you go (change Mon – *payment options*)
- ITIN Info
- Protect Your Clients
- Small Business Tax Center
- Tax Scams: Tax Scams / Consumer Alerts
- YouTube
  - Current: Free Help Preparing Your Tax Return
  - Fri: IRS.gov Website Refresh
- W-2 Email Scam (change Mon – *new scam alert*)
- Taxpayer Bill of Rights

#### VIDEO TT FRIDAY

- IRS.gov Website Refresh

### **Stakeholder Liaison**

#### **7 Events – Est. Attendees: 3,172**

##### **Jan. 30, 2018 (F2F) Far Rockaway, NY. Tax Day & EITC Awareness**

Stakeholder: NYC Taxpayer Advocate, Council Member Joseph Borelli, IRS TAS

Est. Attendance: 60. **DY**

##### **Jan. 30, 2018 (V) MA & NH, Practitioner Liaison Meeting**

Stakeholder: MA & NH Practitioner Organizations. Est. Attendance: 30. **DY**

##### **Jan. 31, 2018 (V) Nationwide, Understanding Refundable Credits Webinar**

Est. Attendance: 3,000

##### **Feb. 1, 2018 (V) Nationwide, Federal Trade Commission Webinar.**

Est. Attendance: 3,000

##### **Feb. 1, 2018 (F2F) Jackson, MS. Practitioner Liaison Meeting**

Stakeholder: MS CPA Society. Est. Attendance: 35 **CEC**

**Feb. 1, 2018 (V) Bloomington, MN. IMRS Call**

Stakeholder: Tax professional organizations in MN, ND, SD, MT, IA and WI. Est. Attendance: 20

**Feb. 1, 2018 (F2F) Sacramento, CA Small Business Forum**

Stakeholder: Sacramento County Department of Human Assistance, SBA, Est. Attendance: 25

**Feb. 2, 2018 (V) Dallas, TX. First Friday – IMRS Call**

Stakeholder: Society of CPA's (AZ, TX, NM, GA), Society of EA's (AZ, TX, NM), AZ Society of Practicing Accountants, NATP (TX, NM, AZ, FL), State Bar (AZ, TX), Texas Assoc. of Financial and Tax Specialist (TAFTS), Taxpayer Advocacy Panel (TAP),  
Est. Attendance: 27

## **Communications and Liaison – Weekly Activity Report**

### **Week of February 12, 2018**

#### **Internal Communications**

##### IRS Headlines

- Some employees, family and friends can take advantage of free tax preparation options (W&I)
- Review your Statement of Earnings and Leave every pay period (HCO)
- Use Skype or Jabber to hit your communication target (IT)

##### Leaders' Alert

- Review new guidance for managing teleworkers in the revised IRM (HCO)

##### Poll Question

- Black History Month 2018 poll question - Who established Negro History Week, the precursor to Black History Month?
- What can you do today to avoid technology issues tomorrow? (IT)

##### Spotlight

- Black History Month (CI)

##### Daily News

- Your SmartID card will expire if you don't re-enroll when notified (FMSS)
- Random Access Screening Program at Main IR has been a success (FMSS)
- You must choose to keep or terminate your health insurance if in non-pay status (HCO)
- Know whom to call for payroll or HRConnect issues (HCO)
- Find answers and solutions to common print-related questions and issues (IT)
- Find answers to Training Policy (HCO)
- Use do-it-yourself tools Web Chat and walk-in options for IT help (IT)

#### **Media Relations**

##### Potential news releases for this week:

- New IRPAC members
- Avoid the Rush Series:
  - During peak call times, IRS.gov has answers
  - Track your tax refund on IRS.gov
  - Be prepared to validate identity when calling IRS
  - Appointments needed when visiting a TAC
  - Prior-year AGI may be needed when e-filing

##### Potential releases for coming weeks:

- Refund timing for EITC/ACTC refunds
- Dirty Dozen series
- Tax time guide series
- March 1 tax deadline—farmers and fishermen
- SOI winter bulletin available
- Unclaimed refunds

#### **National Public Liaison**

## Legislative Affairs

Not IRS Agency Records



### **UPCOMING HEARINGS:**

On Wednesday, February 14, 2018, a hearing is scheduled to be held before the Senate Finance Committee on the IRS budget. The Committee is asking for the Secretary to testify during the morning, followed by the Acting Commissioner at 2:30 pm, location TBD.

Witnesses: Dave Kautter, Acting Commissioner is scheduled to testify.

Not IRS Agency Records



## Social Media

### **TWITTER**

- Pinned: Use “Where’s My Refund?” to get accurate and up-to-date info on your [#IRS](#) tax refund. <http://www.irs.gov/refunds>
- Avoid the rush *\*recirculating*
- EIN online *\*new*
- Web first *\*new*
- Security Summit: ID Theft report
- VITA / TCE
- Filing Season (/freefile, /payment, /account, /help, */refunds, /directdeposit, /forms*)
- #IRSTaxTips
- ITIN renewals
- Scams
- W-2 data loss reporting
- Protect Your Clients (cards)

### **POTENTIAL NEW YOUTUBE VIDEOS**

- Help for Taxpayers
- IRS Tax Help for People With Disabilities
- When Will I Get My Refund
- Estimated Tax Payments
- IRS Letter CP2000 *\*released last week*

- EITC get it right *\*released last week*

#### FB TABS (Eng & Spa)

- Payment options (*change Mon – Where's My Refund*)
- New scam alert
- EITC
- VITA (*change Mon – TCE*)
- Tax Scams: Tax Scams / Consumer Alerts (*change Mon – ITA*)
- Protect Your Clients (*change Mon – Security Summit: Less ID Theft*)
- ITIN Info
- Small Business Tax Center
- YouTube
  - Current: IRS.gov Website Refresh
  - Fri: *What to Bring at Tax Time (ASL)*
- Taxpayer Bill of Rights

#### VIDEO TT FRIDAY

- What to Bring at Tax Time (ASL)

### **Stakeholder Liaison**

3 Events – Est. Attendees: 140

Feb. 14, 2018 (V) Dallas, TX. Business Theft, Cyber Security, and how to protect yourself.  
Stakeholder: Big Bend Region SBDC. Est. Attendance: 20. EDL for GT

Feb. 14, 2018 (V) Oklahoma City, OK. Central Area Payroll Meeting  
Stakeholder: American Payroll Association – East Chapter. Est. Attendance: 50. CEC

Feb. 16, 2018 (F2F) Scottsdale, AZ. Association of Government Accountants - Federal Tax Updates 2018  
Stakeholder: Assoc. of Government Accountants – Phoenix. Est. Attendance: 70. EDL for GT

## **Communications and Liaison – Weekly Activity Report Week of February 20, 2018**

### **Internal Communications**

#### IRS Headlines

- Update to Tech Tip: Use email wisely (IT)
- The revised IRS Telework Program IRM 6.800.2 is now available (HCO)
- Develop during year two of 2017-2018 LSR cycle (HCO)

#### Leaders' Alert

- LA - Elements of Training Newsletter (HCO)

#### Poll Question

- When did Congress authorize the deduction of charitable contributions from taxable income? (RAAS)
- SHOTs poll question (HCO)

#### Spotlight

- Not skating on thin ice (W&I)
- Where will a thousand pairs of running shoes take you? (W&I)

#### Daily News

- EITC Awareness Day activities held nationwide (W&I)
- Review your statement of earnings and leave every pay period (HCO)
- Update your tax information before 3/3 to stay tax exempt (HCO)
- Update to Tech Tip: Use email wisely (IT)
- Avoid email bloopers (IT)

### **Media Relations**

#### Potential news releases for this week:

- Avoid the Rush: Tuesday, Feb. 20 busiest day for help line
- March 1 tax deadline—farmers and fishermen

#### Potential releases for coming weeks:

- Refund timing for EITC/ACTC refunds
- Dirty Dozen series
- Tax time guide series
- SOI winter bulletin available
- Unclaimed refunds
- Second quarter interest rates

### **National Public Liaison**

Wednesday, Feb. 21, 8:30 am – 10:30 am – Tax Executives Institute leadership meets with Acting Commissioner Kautter, Acting Chief Counsel Paul, LB&I Commissioner O'Donnell, Appeals Director Donna Hansberry and other executives. Room 2140.

### **Legislative Affairs**

Not IRS Agency Records



#### **UPCOMING HEARINGS:**

Currently, there are no hearings scheduled.

#### **UPCOMING DISTRICT CONGRESSIONAL LIAISON BRANCH MEETINGS:**

On Tuesday, February 20, 2018, Paul Axelson, District Congressional Liaison Branch will be a panelist at a Town Hall meeting held by Congressman Mike Thompson, member of the House Ways and Means Committee in Napa California. Also on the panel will be Darien Shanske, Professor of Taxation, University of California Davis Law School. Topics to include filing season information, online tools for taxpayers and tax reform.

#### **Social Media**

#### **Stakeholder Liaison**

5 Events – Est. Attendees: 6,055

Feb. 21, 2018 (V) Atlanta, GA. Conversations with Stakeholder Liaison (IMRS)  
Stakeholder: FL and GA Practitioner Organizations. Est. Attendance: 20. GT

Feb. 21, 2018 (V) Mobile, AL. Mid-South IMRS Updates  
Stakeholder: AR, LA, KY, TN, MS, AL Practitioner Organizations. Est. Attendance: 25. CC

Feb. 22, 2018 (V) Nationwide. Understanding Field Assistance Services Web Conference  
Estimated Attendance: 6,000 (Two broadcasts for 2/22/18) JHB for DG

Feb. 22, 2018 (V) Downers Grove, IL. Stakeholder Relationship Management Local Counsel (SMRLC)  
Stakeholder: IRS BOD's. Est. Attendance: 10 CC

## **Communications and Liaison – Weekly Activity Report Week of February 26, 2018**

### **Internal Communications**

#### IRS Headlines

- Office of Servicewide Penalties to hold reasonable cause, managerial approval of penalties discussion on March 6 (SBSE)
- The Family and Medical Leave Act can help you when you need it (HCO)
- Your Federal Employee Group Life Insurance premium may increase as you age (HCO)

#### Leaders' Alert

- Guidance for approving religious compensatory time (HCO)
- Use these tips to help your employees avoid administrative debt (HCO)
- How to build trusting relationships with your employees (HCO)

#### Poll Question

- SHOTs poll question (HCO)
- PQ When did the IRS formally adopt the Taxpayer Bill of Rights (C&L)

#### Spotlight

- Spotlight revisited: Filmmaker's cut (CI)

#### Daily News

- SmartID cards do's and don'ts (FMSS)
- Upcoming CFO workshops (CFO)
- What you need to know about the Taxpayer Bill of Rights (C&L)

### **Media Relations**

#### Potential news releases for this week:

- Refund timing for EITC/ACTC refunds
- Withholding calculator (with FAQs)
- Tax Time Guide series begins
- Dirty Dozen series begins

#### Potential releases for coming weeks:

- Tax time guide series
- Unclaimed refunds
- Second quarter interest rates

### **National Public Liaison**

### **Legislative Affairs**

Not IRS Agency Records



## UPCOMING HEARINGS:

Currently, there are no hearings scheduled.

## Social Media

### TWITTER

- Pinned: Tax refunds take time to process after leaving [#IRS](#), and many banks don't do it on wknds/holidays, like President's Day. [#ETC](#)/ACTC refunds should start arriving by Feb. 27. <http://www.irs.gov/refundtiming> *\*This tweet has 68 Retweets, 82 Likes and 128 Replies*
- Extenders *\*new*
- Fishing and farming deadline *\*thru 3/1*
- Avoid the rush
- EIN online
- Filing Season (Web first, myths, AGI, /etc, /transcripts, /refundtiming, /ita, /freefile, /payments, /account, /help, /refunds, /directdeposit, /forms, /VITA, /opa, /passports)
- Tax Tips
- ITIN renewals
- Scams, Watch out for erroneous refunds, W-2 data loss reporting
- Protect Your Clients
- Home equity *\*pending*
- Unclaimed Refunds *\*potential*

### YOUTUBE

#### Potential New Videos

- When Will I Get My Refund
- IRS Letter CP3219-A: Statutory Notice of Deficiency

#### Newly Released:

- IRS Tax Help for People With Disabilities (ASL)
- Ayuda para contribuyentes (Help for Taxpayers)
- Claiming EITC or ACTC? Your Refund May Be Delayed (ASL)

- Earned Income Tax Credit – Get It Right (ASL)
- Estimated Tax Payments (ASL)
- Help for Taxpayers
- Crédito Tributario por Ingreso del Trabajo – Obténgalo correctamente (EITC-Get It Right)
- Estimated Tax Payments
- Pagos de impuestos estimados (Estimated Tax Payments)
- IRS Tax Help for People With Disabilities
- IRS Letter CP2000-Proposed Changes to Your Tax Return
- Carta CP2000 del IRS (IRS Letter CP2000-Proposed Changes to Your Tax Return)
- Help for Taxpayers (ASL)
- IRS Letter CP2000 Proposed Changes to Your Tax Return (ASL)
- Some Taxpayers Can File Their Employment Taxes Annually (ASL)

#### **FB TABS**

- Where's My Refund
- New scam alerts
- EITC (replacing 2/26 with fishing income deadline; replacing 3/2 with home equity)
- VITA / TCE
- ITA
- Security Summit: Less ID Theft (*replacing 2/26 with extenders education benefits*)
- ITIN Info
- Small Business Tax Center (*replacing 2/26 with payment options*)
- YouTube: ITA (*replacing 3/2 with IRS Letter CP2000 Proposed Changes to Your Tax Return*)
- Taxpayer Bill of Rights

#### **VIDEO TT FRIDAY / Tumblr (Eng & Spa)**

IRS Letter CP2000 Proposed Changes to Your Tax Return

#### **Stakeholder Liaison**

7 Events – Est. Attendees: 355

Feb. 27, 2018 (F2F) Canfield, OH. 2018 Filing Season Updates

Stakeholder: Mahoning Valley Accounting Society. Est. Attendance: 35. DCB for KW

Feb. 27, 2018 (F2F) Tampa, FL. Small Business Forum

Stakeholder: Small Business Admin. -Tampa Office. Est. Attendance: 20. GT

Feb. 28, 2018 (F2F) Houston, TX. U.S. Dept. of Labor Employer Forum

Stakeholder: U.S. Dept. of Labor-Wage & Hour Division. Est. Attendance: 200. GT

Feb. 28, 2018 (V) Anchorage, AK. Alaska Small Business Forum

Stakeholder: AK Small Business Devlp. Center – Statewide Office. Est. Attendance: 20 KH

March 1, 2018 (V) Bloomington, MN. First Thursday (IMRS) DCB for KW

Stakeholder: MN Practitioner Organizations. Est. Attendance: 20.

March 2, 2018 (V) Dallas, TX. First Friday (IMRS)

Stakeholder: FL, GA, TX, NM, AZ Practitioner Organizations. Est. Attendance: 20. GT

March 3, 2018 (F2F) Chicago, IL. African American Small Business Expo

Stakeholder: City of Chicago Dept. of Business Affairs & Consumer Protection

Est. Attendance: 40.CC

## **Communications and Liaison – Weekly Activity Report**

### **Week of March 5, 2018**

#### **Internal Communications**

##### **IRS Headlines**

- Updated withholding calculator, Form W-4 released; calculator helps taxpayers review withholding following new tax (TRIO)
- Tech Tip: How, when and where to get technology information and help (IT)
- You may request time off for religious observances (HCO)
- Your Federal Employee Group Life Insurance premium may increase as you age (HCO)
- Know how to enroll for Living Benefits (HCO)

##### **Leaders' Alert**

- Know the guidance before approving changes to tours of duty or work schedules (HCO)
- IRS to re-employ annuitants to fulfill tax reform legislation requirements (HCO)
- LA- Executive Readiness Program Announcement EC webinars (HCO)
- Learn how you can manage risk at Lunch and Learn April 11 (HCO)
- Know the guidance before approving changes to tours of duty or work schedules (HCO)
- Protect IRS: Collect Smart IDs, security items when employees separate or enter non-work status (FMSS)
- Remind your SharePoint Site Collection Admins to test 2013 Visual Upgrade by April 1 (IT)
- IRS to re-employ annuitants to fulfill tax reform legislation requirements (HCO)

##### **Poll Question**

- What Does OPI stand for? (EDI)
- Which resources have you accessed on IT4U? (IT)

##### **Spotlight**

- Speaking up when urged to stay silent (SBSE)

##### **Daily News**

- Upcoming CFO workshops (CFO)
- IRS veterans: Attend town hall meeting March 7 or 14 (HCO)
- Join the discussion on 3/6, 1 - 2 p.m., ET: Covering in the Workplace: The Silent Killer of Inclusion (EDI)
- Daylight saving time begins 3/11 (HCO)
- Learn proper lifting techniques (FMSS)
- If you received a time-off award, use it (HCO)
- Building a stronger, more collaborative IRS (HCO)
- 

#### **Media Relations**

Potential news releases for this week:

- Dirty Dozen series begins
  - Phishing
  - Phone scams
  - ID theft
  - Return preparer fraud
  - Fake charities

- Tax Time Guide series continues
  - Use IRS.gov to find qualified tax preparer
  - Publication 17
- Offshore Voluntary Disclosure Program ends
- Unclaimed refunds
- Second quarter interest rates

Potential releases for coming weeks:

- Dirty Dozen continues
- Tax Time Guide series continues
- Low Income Taxpayer Clinics – 2018 program report
- April 1 deadline for required retirement plan distributions
- 

### **National Public Liaison**

Thursday March 15, 9 am – 12 pm – NPL Monthly Practitioner Meeting. Room 2140.

Tuesday March 20, Wednesday March 21, all day – Electronic Tax Administration Advisory Committee (ETAAC) working session.

Acting Commissioner Kautter meets with ETAAC on 3/20 at 1 p.m. Room 3313.

### **Legislative Affairs**

Not IRS Agency Records



### **UPCOMING HEARINGS:**

On Wednesday, April 11, 2018, a hearing is scheduled to be held before the House Appropriations Committee, Financial Services and General Government Subcommittee on the IRS FY19 budget. The hearing is scheduled for 10:00, location TBD.  
Witnesses: Dave Kautter, Acting Commissioner is scheduled to testify.

### **UPCOMING DISTRICT CONGRESSIONAL LIAISON BRANCH MEETINGS:**

Not IRS Agency Records



On Thursday, March 8, 2018, Kate Hunyady, District Liaison, Legislative Affairs; Barbara Bowling (TAS); and Deborah Sampson (SPEC) will attend and present at an IRS Mobile Event hosted by staff from Steve Stiver's (OH-15<sup>th</sup>) office. Discussion topics will include filing season information, ID theft information, TAS information, and VITA/TCE tax return preparation.

Not IRS Agency Records



### Social Media

TWITTER



- Pinned: [#IRS](#) has updated the withholding calculator, and released Form W-4 to help you perform a [#PaycheckCheckup](#) following the new tax law: <https://go.usa.gov/xntQ2>
- Dirty Dozen: phishing, phone, id theft, return preparer scams, charity scams *\*new*
- Tax Time Guide: choose a tax pro, Pub 17 *\*new*
- Free Help, Paid Preparer, Refund Timing *\*new*
- Unclaimed Refunds *\*new*
- Withholding Calculator
- Extenders
- Home equity
- EIN online
- Filing Season (Web first, myths, AGI, /eitc, /transcripts, /refundtiming, /ita, /freefile, /payments, /account, /help, /refunds, /directdeposit, /forms, /VITA, /opa, /passports)
- ITIN renewals
- Scams, Watch out for erroneous refunds, W-2 data loss reporting
- Protect Your Clients
- Offshore Voluntary Disclosure *\*potential*

## YOUTUBE

### Potential New Videos

- When Will I Get My Refund?
- Do I Have to File a Tax Return?
- IRS Letter CP3219-A: Statutory Notice of Deficiency

### Newly Released:

- IRS Tax Help for People With Disabilities (ASL)
- Ayuda para contribuyentes (Help for Taxpayers)
- Claiming EITC or ACTC? Your Refund May Be Delayed (ASL)
- Earned Income Tax Credit – Get It Right (ASL)
- Estimated Tax Payments (ASL)
- Help for Taxpayers
- Crédito Tributario por Ingreso del Trabajo – Obténgalo correctamente (EITC-Get It Right)
- Estimated Tax Payments
- Pagos de impuestos estimados (Estimated Tax Payments)
- IRS Tax Help for People With Disabilities
- IRS Letter CP2000-Proposed Changes to Your Tax Return

## FB TABS

- Where's My Refund
- New scam alerts
- Home equity
- VITA / TCE
- ITA
- Extenders education benefits
- ITIN Info
- Payment options

- YouTube: IRS Letter CP2000 Proposed Changes to Your Tax Return
- Taxpayer Bill of Rights

#### **VIDEO TT FRIDAY / Tumblr (Eng)**

- Filing Status

#### **VIDEO TT FRIDAY / Tumblr (Eng & Spa)**

IRS Letter CP2000 Proposed Changes to Your Tax Return

#### **Stakeholder Liaison**

10 Events – Est. Attendees: 655

March 6, 2018 (F2F) New York, NY. Natl. Consumer Week Protection News Conf.

Stakeholder: Better Business Bureau of NY. Est. Attendance: 20. DY

March 7, 2018 (F2F) Los Angeles, CA. Natl. Consumer Protection Resource Fair

Stakeholder: Los Angeles County Dept. of Consumer Affairs. Est. Attendance: 200. JHB for DG

March 7, 2018 (F2F & V) Oklahoma, OK. Oklahoma Bar Assoc. Webcast

Stakeholder: OK Bar Association. Est. Attendance: 50. CC

March 8, 2018 (F2F) Cleveland, OH. Business @ Breakfast

Stakeholder: Cleveland Better Business Bureau. Est. Attendance: 25 LM for KW

March 8, 2018 (V) Columbia, SC. SC APA Upstate Chapter Meeting

Stakeholder: South Carolina APA-Upstate Chapter. Est. Attendance: 65. DY

March 8, 2018 (F2F) Chicago, IL. Small Business Forum

Stakeholder: Better Business Bureau of Chicago and Northern IL. Est. Attendance: 10. CC

March 8, 2018 (V) Richmond, VA. Stakeholder Relationship Management Local Counsel

Stakeholder: Various IRS BOD's. Est. Attendance: 15. DY

March 9, 2018 (F2F) Las Vegas, NV. 3<sup>rd</sup> Annual Natl. Consumer Protection Week

Stakeholder: Nevada Department of Business & Industry - Consumer Affairs.

Est. Attendance: 200. JHB for DG

March 9, 2018 (F2F) Arlington, VA. 2018 IRS Small Business Forum

Stakeholder: Arlington Economic Development. Est. Attendance: 20 DY

March 9, 2018 (F2F) Thomasville, NC. Small Business Forum

Stakeholder: Davidson County Community College, Small Business Center Network of NC. Est. Attendance: 50. DY