

National Taxpayer Advocate Public Forum  
Harrisburg, PA  
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Written statement from Roger Eberlin

Hello.

My name is Roger Eberlin. A little background information on me and why I am here today to discuss the IRS's future plans to go primarily on line. I was married to my now deceased wife for almost 45 years. We had three wonderful children and now have families of their own. On May 19th of 2014 after suffering setbacks from surgery and being hospitalized many times she passed away. As you can imagine, this was an incredibly painful and stressful time of my life, Further complicated by being a victim of identity theft. I had medical bills and funeral expenses, and property taxes to pay for and was unable to obtain my refund from my taxes that I had filed early in 2014.

I may not have the exact time frames correct as it was extremely stressful for me during that time for several months. I electronically filed my return with Turbo Tax and got the message back that my return had been accepted and approved on the same day that I filed it. After not receiving my return for a month, I called the IRS helpline. After hearing "Your call is very important to us. Please continue to hold and someone will be right with you" for about twenty minutes or so, I heard "we are presently receiving a high volume of calls, please call back later". Then I heard the click. This happened to me several times before I was finally able to reach a human being on the other end.

When I did finally speak to someone, I would explain to her that I had not received my refund from my return I had filed months earlier. I was then put back on hold while she researched my account. Once she came back on the line, I would be told "Your return is in process". That same scenario happened several times when I was lucky enough to get somebody on the other end. Never once was I told there was a problem or when I might receive my return.

My niece Brenda Lackey had just started working for the Taxpayers Advocate Services that year, so I called her and asked if this was normal. She connected me with the proper people and got them involved. After that, I had my return deposited in a few days. Thank goodness for that department or who knows, I might still be waiting. The last 2 years I've been issued a Pin which worked well

I have heard of the "Taxpayer Experience of the Future" and the plans to go mainly to online interactions with taxpayers in the future. While the plans may be an improvement there are still issues that concern me. The technology that the IRS has used so far is completely inadequate and outdated. In my opinion it will take years to bring them up to the level that would be needed to ensure that the taxpayers receive the help they deserve and need. I also have concerns about the security of taxpayers' information with these online programs. The IRS has already been hacked with get transcripts, which I assume caused numerous taxpayer issues when they couldn't get transcripts on line that they needed to apply for financial aid for their children or buy a new home and because the IRS has already cut back on assistance receive from humans, how did these taxpayers obtain what they needed? I would say it probably involved delays and was very time consuming for the taxpayer.

Being a victim of identity theft myself, at a time that my life had already been turned upside down I needed the human person to help me through the process. I did not need the added stress of having to call several times and getting through sometimes after lengths of hold time. When I reached the person on the other end, it would have been far more helpful to have somebody that was able to help me and tell me what was going on. I didn't get the answers I needed or the refund I needed to help me through a very stressful time until I went through the Taxpayer Advocates Office.

Speaking from personal experience, identity theft is already a large issue with the IRS. I cannot help but worry that going primarily online in the future will cause the identity theft issue to grow larger and will cost the taxpayers a lot more money.