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Portland Public Forum on IRS Future State

**Written statement by Ilene Waterman, representing
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There are larger concerns growing within the Native American culture as well as others in our country. I am a VITA volunteer for NAYA's community.

First issue we see is **identity theft** that is broader than first imagined. There are issues of returns being rejected due to already filed returns. Our clients are more and more discouraged with the future state of the IRS and the ability to obtain the needed services for complex issues.

Next is the misconception that it is only our elderly being preyed upon when it comes to the aspect of **scam phone calls**. There are many other age groups and it seems to fall in line with if they have a balance owed. There has been many individuals receiving these calls.

Next there is the fact that IRS is providing **less contact with a warm human body**. Employees of the IRS are supposed to be trained in order to assist with a large knowledge base at their control. It is becoming more and more difficult for those taxpayers that want to be voluntary compliant individuals and are not successful with the web direction. In the past, we could call and speak to **TAX LAW specialist** and now we are seeing less and less assistance in this field. We are concerned that the future state will eliminate this assistance. The scope of our volunteer service is also limited, and seems to become more difficult to find the correct specifications that are understandable.

Attempting to make online accounts; for those who do not have a credit background, it is near impossible to complete. When you to call the IRS for assistance the representatives refer to or express the availability of the online tools are for taxpayers convenience. The issue is that it is not convenient and difficult to utilize. People as a whole are intimidated with the web and the

lack of laymen terms being provided. Feeding the fears of our taxpayers and not reducing them.

There are also those individuals that do not have **broadband access**. Some have to travel to obtain internet or broadband services. Once they have access it has now become a concern that who can see what is being done and completed. These locations are unsecure connections as well.

The verification process is also making it very difficult to create the online accounts. The more availability that is created online the less likely we will be able to receive the assistance needed from a person, whether it be **clarification of the Law, Rule, or Regulation**, to what is acceptable in documentation for an aspect on your return in case of audit.

The information on let's say **Form 8962 for Premium Tax Credits**. Making contact with IRS and no one having the full knowledge of how to report the correct reconciliation for taxpayers is in absence.

Another side of the difficulties; is obtaining appointments at the local offices now. What used to be **walks in centers** now have mandatory appointments. When trying to schedule an appointment, they will try to resolve the issue in taking our time on the call when the Taxpayer was advised by another representative to call for an appointment to resolve the issue. There is not enough availability in local offices. Taxpayers are becoming very disappointed in the processes they have experienced in the recent past. This can be true for Native Americans or the general public.

When **making an appointment** it is usually a month out with little availability and not sure where the person is that is making the appointment from. To be sent to other areas for appointments that some Taxpayers do not have the ability to go to an entire different city for that appointment, such as distances of 50 to 100 miles away.

Making a change in the location due to the urgency of the issue or nature of the problem; which can be a travel issue as well? This also causes concerns in not only Native Americans but other diverse cultures and the general public.

Many taxpayers come to the NAYA center for access to a computer for the issues they need to address. We assist the best we can, however we have limitations in the scope of our authority.

Online Payment Agreements: Some who set up these agreements are finding that it is not what they expected. Receiving a letter in the mail later that tells them their agreement defaulted, when they believed in the online set up for an installment agreement was completed. Taxpayers end up having to make contact to correct the issue when it fails online. Contact to IRS helps representatives make notations on accounts for the issues at hand. Online systems do not make notations and does not keep track of the information being received. The issues being researched or tools being utilized are also in question since it provides no means of tracking for the representatives.

Verification processes: Taxpayers with loans with the same financial institutions also are finding the verification process online to be very vague and not specific to the loan in order to answer the verifying questions accurately and ultimately preventing the online access. This does not make it fair and equitable to all across the country. It is becoming apparent to those Taxpayers that they may need a degree to understand the information.

We believe there is a way of having walk-in centers with the ability to make appointments also. **Staffing concerns?** **Continued education and training** are a must for Customer Service representatives to help assist the processes.

In closing; our concerns are high and with the aspect of technology increasing we see more issues as well. Taxpayers are also concerned about breaches and not protecting them in the fullest. Taxpayers believe that some of the online access that has been created also can provide access for professional hackers.

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