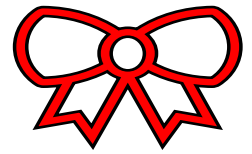




Issues, Concerns, and Resolutions

April 24, 2025



Discussions from prior meetings...and more

- **DUT document “limits”:** [IRS expands secure digital correspondence for taxpayers | Internal Revenue Service](#)
- **Document Upload Tool National Webinar:** [Document Upload Tool](#)
- **Masking EFINs on tax returns- check your software provider!**
Examples:
 - [Drake Tax - Mask SSN, EFIN, PTIN on Client and Preparer Sets](#)
 - [Ultra Tax CS - Mask confidential information on client tax returns](#)
- **NPL Sharing Social Media:** shared via “Outreach Bundle” emails
- **Employee Retention Credit FAQs update:** [Frequently asked questions about the Employee Retention Credit | Internal Revenue Service](#)

All webinars take place at 2:00pm Eastern

5/8/2025 - Small Business, Big Tools: Resources from the IRS That Will Lead to Success

YouTube recordings @IRSVideos: [IRS Webinars - YouTube](#)

 <p>Webinar: Foreign Tax Credit for Individuals</p> <p>IRS 2:02:12</p>	 <p>Webinar: Mortgage & Interest Expense for Individuals with Partnership Interests</p> <p>IRS 1:00:58</p>	 <p>Webinar: ABCs of Foreign Tax Credit for Individuals</p> <p>IRS 1:58:25</p>	 <p>Webinar: Certain Income Re-sourced by Treaty</p> <p>IRS 1:43:54</p>	 <p>Dealing with Disaster from an Individual Tax Perspective</p> <p>IRS 1:48:00</p>
Schedules K-2 & K-3 with a Focus on the Foreign Tax...	Mortgage & Interest Expense for Individuals with...	ABCs of Foreign Tax Credit for Individuals	Form 1116 - Certain Income Re-Sourced by Treaty	Dealing with Disaster from an Individual Tax Perspective
79 views • 1 day ago	169 views • 1 day ago	101 views • 1 day ago	103 views • 1 day ago	591 views • 8 days ago
CC		CC	CC	CC

Collector issues are the vehicle we use to gather suggestions on new legislation or specialized topics. Examples include:

- **Inflation Reduction Act (IRA) of 2022**
- **Information Return Intake System (IRIS)**
- **Resumption of Collection Notices**
- **Digital Assets**
- **Document Upload Tool (DUT)**
- **Direct File**
- **Form 1099-K (American Rescue Plan)**



Small Business Week
Data Breach
Tax schemes/scams
Disaster Assistance

Tax Professional Data Breach Updates

As of	4/23/2024	4/23/2025
# of Data Breaches	130	193
# of Tax Professionals affected	364	511
# of potentially affected Taxpayers	134,342	223,614

Contact

Your local Stakeholder Liaison (SL) & provide details promptly

Follow

- Guidance from your local Stakeholder Liaison
- Pub. 5293 Data Security Resource Guide for Tax Professionals
- Pub. 4557 Safeguarding Taxpayer Data: A Guide for Your Business and the IRS Data Breach webpage

Establish

- A Written Information Security Plan (WISP). Follow the guidance in:
- Pub. 5709 How to Create a Written Information Security Plan for Data Safety
 - Pub. 5708 Creating a Written Information Security Plan for your Tax & Accounting Practice



Find Your Local Stakeholder Liaison

STAKEHOLDER LIAISON LOCAL CONTACTS

Stakeholder Liaison Area	Phone	Email
Area 2 (CT, DE, MA, MD, ME, NH, NJ, NY, PA, RI, VT)	(412) 404-0151	CL.SL.Area.2@irs.gov
Area 3 (AL, DC, IA, IL, IN, KY, MI, NC, OH, TN, VA, WV)	(405) 982-6807	CL.SL.Area.3@irs.gov
Area 4 (AR, FL, GA, LA, MS, PR, SC, TX, and U.S. VI)	(228) 213-5028*	CL.SL.Area.4@irs.gov
Area 5 (CA, HI, ID, MT, NV, WY)	(203) 492-8630	CL.SL.Area.5@irs.gov
Area 6 (AK, AZ, CO, KS, MN, MO, ND, NE, NM, OK, OR, SD, UT, WA, WI)	(206) 946-3703	CL.SL.Area.6@irs.gov

www.irs.gov Search: Stakeholder Liaison

*new number