

October 13, 2023



# NMSEA HAPPENINGS

NEW MEXICO SOCIETY OF ENROLLED AGENTS, INC.  
PO BOX 30974  
ALBUQUERQUE, NM 87190-0974  
WEBSITE: NMSEA.NET  
E-MAIL: NMSEA2020@GMAIL.COM

President's Letter

Future NMSEA Monthly Meetings & Topics

Educational Opportunities—NAEA & NMTRD

Next NAEA Town Hall Meetings on Bylaw Changes, 11-30-23 at 10am (MT)

Register at:

[https://us02web.zoom.us/webinar/register/WN\\_fscnoNjNRne6s13i49wCmQ#/registration](https://us02web.zoom.us/webinar/register/WN_fscnoNjNRne6s13i49wCmQ#/registration)

& 12-11-23 at 2 pm (MT). Register:

[https://us02web.zoom.us/webinar/register/WN\\_hTJdFXQERJiya4Bzv1-5Dw#/registration](https://us02web.zoom.us/webinar/register/WN_hTJdFXQERJiya4Bzv1-5Dw#/registration)

**NMSEA October conference Oct 25-26. (See attachments 4 & 5)**

**Attachment 1: Official Minutes NMSEA September Monthly Meeting**

**Attachment 2: NMSCPA 2023 NM Tax Conference, Dec 13, 8am - 4:45pm**

**Attachment 3: Pacific Northwest Action Wednesday (PNWAW) IMRS Call Minutes for September 20, 2023**

**Attachment 4: Online Registration Information NMSEA Oct 2023 Conference**

**Attachment 5: Mail-In Registration Form NMSEA Oct 2023 Conference**

**NMSEA  
Board:**

**PRESIDENT:** Sandra Weidner, EA, ABA, NTPI Fellow **VP:** Lynne Shupp, EA

**SECRETARY:** Still available

**TREASURER:** Therese Francis, EA, PhD

**DIRECTORS-AT-LARGE:** John Niemi, EA, MACCT; Keri Cardona, EA; and Andy Rogers, EA

**PAST PRESIDENT:** Peter Wanco, EA, NTPI Fellow, MS Taxation, MBA

**NMSEA dedicated phone number (505) 877-1598 & FAX (505) 298-2191**

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 PO BOX 30974  
 ALBUQUERQUE, NM 87190-0974  
 WEBSITE: NMSEA.NET  
 E-MAIL: NMSEA2020@GMAIL.COM

It's a Great Day to be an EA

May this Friday the 13th be your lucky day!

I, first, want to thank all of you who participated in our Town Hall meeting. It was overwhelmingly agreed that we should stay as an Affiliate as long as we can, but we do need members to step up in leadership roles.

I know the deadline is the 16th, but don't forget to register for our Annual Conference on Wednesday & Thursday, October 25th & 26th. We have some of the best speakers available with interesting and informative classes, and a little bit of fun for the "official" end of tax season!

Sandy Weidner, NMSEA President, EA, ABA, NTPI Fellow

**Being an Enrolled Agent is not a job — It is a Profession!**

**NMSEA Oct Meeting**  
**No October NMSEA monthly meeting due to NMSEA October Conference Oct 25-26.**



**Presentation:**  
**None**

**NMSEA Board:**

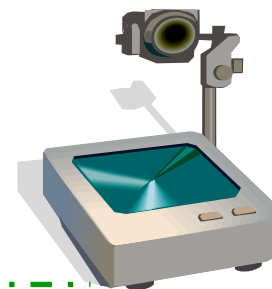
**PRESIDENT:** Sandra Weidner, EA, ABA, NTPI Fellow **VP:** Lynne Shupp, EA  
**SECRETARY:** Still available **TREASURER:** Therese Francis, EA, PhD  
**DIRECTORS-AT-LARGE:** John Niemi, EA, MACCT; Keri Cardona, EA; and Andy Rogers, EA  
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**NMSEA dedicated phone number (505) 877-1598 & FAX (505) 298-2191**

**FROM THE EDUCATION COMMITTEE:**

Co-Chairpersons: Lynne Shupp & Shelley Barker, Steven Stauss, Monica Hardeman, Earl Collison, and Virginia Fell

Nov 17, 2023--Recent Court Cases - Shelley Barker, EA, NTPI Fellow



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## **Important Dates to Note on Your Calendar**

### **October NMSEA Conference Oct 25-26, 2023 (16 CE)**

**PRESENTERS:** Laura Strombom, EA, MBA, NTPI, CSEA, DBA: All About Numbers, Stockton, CA; Lelah Martinez, IRS; NMSEA Members--Lynne Shupp, EA, RFC & Earl Collison, EA & Therese Francis, EA.

**Topics presented (See Attachment 4)**

**Location:** Courtyard by Marriott, 5151 Journal Center Blvd, Albuquerque -- where we had it last year. **In-Person check-in 7:30-8 AM. Social event, 6 PM, on Oct 24 at nearby Restoration Pizza (right behind the hotel) at 5161 Lang Ave NE, Alb. Register online information (Attachment 4). Mail-in Registration form (Attachment 5).**

**NMSEA 2024 Federal Update** scheduled for Monday 1/8/24 and Tuesday 1/9/24 at the Courtyard by Marriott, 5151 Journal Center Blvd. Our presenter will, once again, be A.J. Reynolds. The **NMSEA 2024 NM Update** will be presented by Zoom from 9 am to Noon on Friday 1/12/24 with various NMTRD presenters.

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### **QR Code to directly access our NMSEA Website**



**2023-24 NMSEA BOD**

**President: Sandra Weidner, EA, ABA, NTPI Fellow**

**VP: Lynne Shupp, EA**

**Secretary: **Still Available****

**Treasurer: Therese Francis, EA, PhD**

**Directors-at-Large: Keri Cardona, EA; John Niemi, EA,  
MACCT; Andrew Rogers, EA**

**Past President: Peter Wanco, EA, NTPI Fellow, MBA**



**Welcome aboard to: None**

## NMSEA Monthly Meeting Sept 22, 2023



**3 Virtual Attendees**



**14 In-Person Attendees**



**Education Committee:** A generous donor has contributed 30, 3-inch binders to the NMSEA 2023 October Conference for members purchasing the \$70 printed materials package. The NMCPA has registered with the IRS and now EAs taking a CPA training seminars/webinars/classes will qualify for IRS CE credit. NMSEA has confirmed that CPAs will qualify for NM certification.

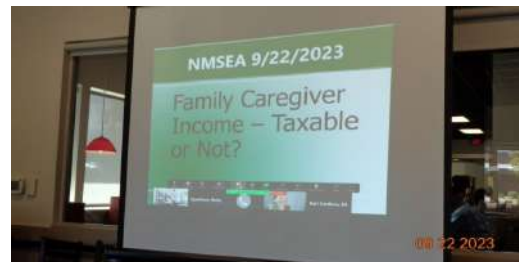
**Membership Committee:** NMSEA has had 7 members renew their membership in September. An employee of Lynn Shupp's office has agreed to contact our members to encourage signing up for the October Conference. NMSEA will award honor certificates for anyone who has been a member for over 25 years.

**Unfinished Business:** Peter Wanco has received quotes from Brown & Brown Insurance of NM, Inc for general liability insurance, excess liability insurance, Errors & Omissions (E&O) insurance, Directors & Officers (D&O) liability insurance, and property coverage.

NMSEA Shred Fest was busier than expected. NMSEA originally estimated and paid for 3hrs shredding support from AA Mobile Shredders. However, to process the approximately 7, 500 pounds of documents brought to us that day required 3 3/4 hrs at a cost of \$1,100. A decision must be made about reducing how widely we advertise for next year's Shred Fest. However, we did exceptionally well by collecting \$1,550 cash and four boxes of school supplies for APS Title 1. As a reward for the outstanding help we received from the ABQ Scout Troop 166 scouts, money will be donated from the NMSEA President's Discretionary Fund for a Scout Honor Dinner to be put on by the Troop.

Quickfinder orders from our members has been somewhat down from previous years. Cutoff date is September 30.

NMSEA will host a Zoom Town Hall Meeting on Sept 27 at noon for our members to discuss the proposed NAEA reorganization.



Monica Hardeman gave an excellent presentation on  
“Family Caregiver Income - Taxable or Not Taxable?”



› National Association  
of Enrolled Agents

## **NAEA Town Hall Meeting held on June 14**

Topics discussed:

At their May 19 meeting, the NAEA Board of Directors voted to put forth bylaws amendments that will remove NAEA's dual membership with state affiliates and create a state chapter model. In addition, the board also approved the removal of the 30 hours CE requirement for all NAEA members and associates. These bylaws amendments will go to the membership for a vote in the fall. Thank you to all members who attended the town hall to learn more about why these changes are being recommended and how this will impact your membership.

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Next NAEA Town Hall Meetings on Bylaw Changes, 11-30-23 at 10am (MT) and 12-11-23 at 2 pm (MT). Register at:

<https://www.naea.org/naea-governance-changes-2023/>

## Your Zoom Meeting Invitation

NMSEA invites you to a scheduled Zoom meeting.

Topic: NMSEA Monthly Meeting

Time: **No October meeting**

To Join Zoom Meeting either click on this link

or go to Zoom.us and click on the tab “Join a Meeting”

Meeting ID:

**Passcode:**

One tap mobile

+13462487799,,xxxxxxxxxxxxxxxx# US (Houston)

+16694449171,,xxxxxxxxxxxxxxxx# US

NOTE: There is a new, unique link with Meeting ID for each monthly meeting.

This will be a **hybrid meeting** for ZOOM attendees and in-person attendees at The Golden Corral, 5207 San Mateo Blvd, ABQ.





## **Pacific Northwest Action Wednesday (PNWAW)** **Call minutes for September 20 (attachment 4)**

Ellen Briscoe, EA, ATA is our representative. The purpose of the Action Wednesday Call for Area 6 is for the practitioner community to bring issues related to IRS functions to the attention of the IRS. Specific taxpayer issues are not addressed. If you have a problem that may need to be corrected, please bring it to Ellen's attention at: [ecbtaxpro@comcast.net](mailto:ecbtaxpro@comcast.net) Next meeting scheduled for Oct 18, 2023.

Stakeholder Liaison Area	Phone	Email
Area 2 (CT, DE, MA, MD, ME, NH, NJ, NY, PA, RI, VT)	<a href="tel:412-404-9151">412-404-9151</a>	<a href="mailto:CL.SL.Area.2@irs.gov">CL.SL.Area.2@irs.gov</a> <input checked="" type="checkbox"/>
Area 3 (AL, DC, IA, IL, IN, KY, MI, NC, OH, TN, VA, WV)	<a href="tel:405-982-6807">405-982-6807</a>	<a href="mailto:CL.SL.Area.3@irs.gov">CL.SL.Area.3@irs.gov</a> <input checked="" type="checkbox"/>
Area 4 (AR, FL, GA, LA, MS, PR, SC, TX, and U.S. VI)	<a href="tel:216-415-3518">216-415-3518</a>	<a href="mailto:CL.SL.Area.4@irs.gov">CL.SL.Area.4@irs.gov</a> <input checked="" type="checkbox"/>
Area 5 (CA, HI, ID, MT, NV, WY)	<a href="tel:203-492-8630">203-492-8630</a>	<a href="mailto:CL.SL.Area.5@irs.gov">CL.SL.Area.5@irs.gov</a> <input checked="" type="checkbox"/>
Area 6 (AK, AZ, CO, KS, MN, MO, ND, NE, NM, OK, OR, SD, UT, WA, WI)	<a href="tel:206-946-3703">206-946-3703</a>	<a href="mailto:CL.SL.Area.6@irs.gov">CL.SL.Area.6@irs.gov</a> <input checked="" type="checkbox"/>



## Educational Opportunities



NAEA Continuing Education Portal

<https://www.pathlms.com/naea#>

### Other education opportunities:

Various certificate programs: Crypto, Investments, C-Corps, etc listed on the Continuing Education Portal webpage.

## Educational Opportunities



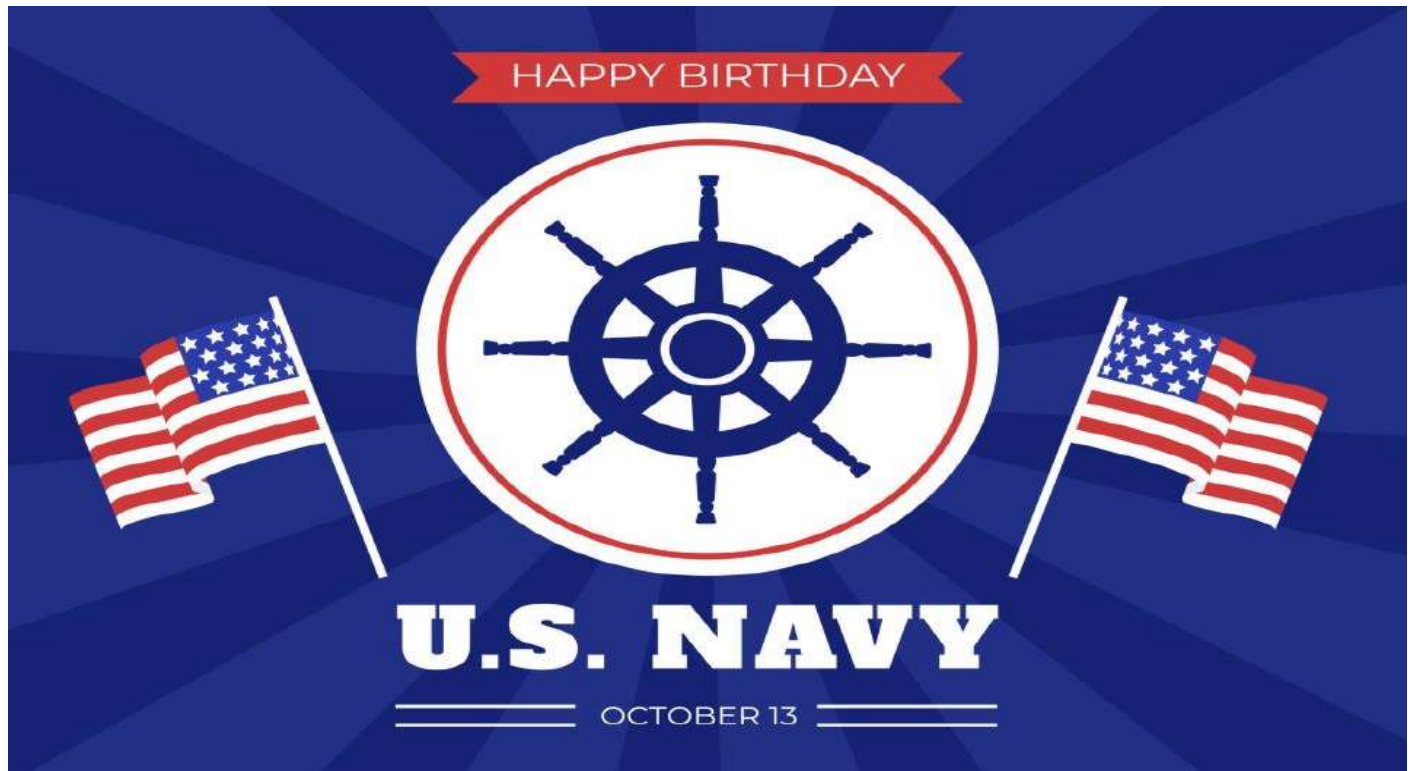
### Workshops Schedule

The New Mexico Taxation and Revenue Department suspended its in-person workshops in March 2020 in response to the public health emergency. The Department resumed tax workshops for New Businesses and now New Employers in a virtual format using the Zoom online meeting platform. Participants will be able to direct their questions via [New.Businesses@state.nm.us](mailto:New.Businesses@state.nm.us) which will be posted during the presentation.

#### **New Business Workshop**

The New Business Workshop presented by NM Taxation & Revenue is a comprehensive look at the Business Tax Identification Number (BTIN) nee CRS— Gross Receipts, Withholding and Compensating Tax programs. It covers such topics as Non-Taxable Transaction Certificates, Estimated income tax payments for business owners, deductions and exemptions from Gross Receipts, special tax programs and audits. We also present e-file training.

<https://www.tax.newmexico.gov/news-alerts/workshop-schedule/>



2023 NMSEA pins and mousepads. Members get one free and only \$5 each for extras or for non-members! Sandy Weidner will be distributing them as she sees members or they can contact her if they want to buy one at: [sweidner45@comcast.net](mailto:sweidner45@comcast.net)



**No trees were harmed in the creation of this newsletter. However, a lot of electrons were terribly inconvenienced.**

**To receive this newsletter, please send your e-mail address to the newsletter editor, Richard Wright, at [rwright77@comcast.net](mailto:rwright77@comcast.net) (editor since July 2009)**

The *NMSEA Happenings* is published by the New Mexico Society of Enrolled Agents, Inc, PO Box 30974, Albuquerque, NM 87190-0974 for the benefit of NMSEA members and affiliates. This publication is designed to provide accurate and authoritative information in regard to the subject matter covered. It is distributed with the understanding that neither the publisher nor author is engaged in rendering specific legal, tax or accounting advice or other professional services. If specific advice or other expert assistance is required, the services of a competent professional person should be sought.



# ADVERTISEMENTS

Advertising is available. Cost: Annual (8 consecutive issues)  
Business card size--\$85 + GRT    1/4 page--\$100 + GRT  
1/2 page--\$150 + GRT    Full page-- \$225 + GRT  
Contact Sandy Weidner, NMSEA President at  
[sweidner45@comcast.net](mailto:sweidner45@comcast.net) for approval of your ad.



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NEW MEXICO SOCIETY OF ENROLLED AGENTS  
PO BOX 39074 ALBUQUERQUE, NM 87190-1974

*IT'S A GREAT DAY TO BE AN EA*

Minutes of the NMSEA Monthly Meeting, September 22, 2023 live and Zoom on-line.

**MEMBERS PRESENT:** In-person & virtual -Kathryn Ayre, Shelley Barker, Keri Cardona, Monica Hardeman, Sandra Harstad, Mary Lois Hulsman, Anita Lovato, John Niemi, Patricia Padgett, Susan Pules, Troy Scott, Lynne Shupp, Betty Speelman, Peter Wanco, Sandra Weidner and Richard Wright. Guests present were Julie Ashner.

Sandra Weidner, President called meeting to order 12:00 pm

**Secretary's Report:** Minutes from August monthly meeting were presented. Motion to accept (Anita Lovato, Lynne Shupp). Motion passed.

**Treasurer's Report:** The Treasurer's report was presented. Motion to accept (Lynne Shupp, Troy Scott). Motion passed. The Budget for 2023-2024 was presented. Motion to accept (Peter Wanco, Lynne Shupp). Motion passed.

**Team Reports:**

**Education:** Shelley Barker reported that everything is on track for the October Conference. A reminder that attendees can register either on-line through Eventbrite or by paper product. Padgett's HRB office has donated about 30 large binders that we will be able to use at the conference. NMSEA reached out to the President of the local CPA Association. The two organizations are going to try to work together and to advertise all of the classes that they offer to their members. A reminder that Conference attendees can register either on- line through Eventbrite or by paper product.

**Membership:** Sandy Weidner reported that we had 7 membership renewals. Cheri Kimbrell has volunteered to make phone calls to our members to remind them about the October Conference. She will eventually be calling all of the EAs in NM to try to get them to join the Society.

**Unfinished Business:** There was a discussion about obtaining E&O Insurance. Peter will get in touch with the company Brown & Brown to get our questions answered.

Shelley Barker reported that NMSEA received \$1,550 in donations at our Shred Fest. We donated that money and 4 boxes of school supplies to Title I. Sandy Weidner is going to take \$250 of the budget's Presidential Discretionary money and donate it to the Boy Scout Troop that helped with the Shred Fest.

Quickfinder orders are a little behind. Shelley reminded everyone who wanted to order some that the deadline is approaching.

Sandy Weidner reminded everyone to try to attend the NMSEA Townhall meeting on September 27<sup>th</sup> at noon. It will help explain the recent By-law changes that NAEA is proposing.

**New Business:** Anita Lovato and Sandy Weidner showed us letters that their clients have recently received involving ERC. There was a discussion about the amended returns that would be required for 2020 and 2021.

**Education Presentations:** Monica Hardeman gave a presentation about Family Caregiver Income and when/if it is taxable.

Sandy Weidner announced that the next monthly meeting will be November 17, 2023. Meeting adjourned.

Respectfully Submitted,  
Shelley Barker (substitute Secretary)



## 2023 New Mexico Tax Conference

The NMSCPA is excited to partner with the New Mexico State Bar for a second year for the New Mexico Tax Conference. We have a great line up of speakers and topics. Below is a sneak peak of some conference agenda:

### Issues in Partnership Merger



Jim Hamill, CPA



Vincent Haslam, Attorney



## New Mexico Legislative Update



Richard Anklam, CPA



Suzanne Bruckner,  
CPA & Attorney

## Artificial Intelligence in Tax Practice



Caitlin Tharp, Attorney



Travis Thompson, Attorney

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Wednesday, December 13th  
New Mexico State Bar  
Hybrid  
8:00am - 4:45pm  
\$373.00

In-Person Registration:

[https://www.nmscpa.org/cpe/058333HG-new\\_mexico\\_tax\\_conference](https://www.nmscpa.org/cpe/058333HG-new_mexico_tax_conference)

Virtual Registration:

[https://www.nmscpa.org/cpe/058334HG-new\\_mexico\\_tax\\_conference-virtual](https://www.nmscpa.org/cpe/058334HG-new_mexico_tax_conference-virtual)

**September 20, 2023**

***Pacific Northwest Action Wednesday IMRS Call***

**Virtual Meeting via MS Teams**

Time: 10:00 am –11:00 am (PDT)

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**Attendees:**

Internal Revenue Service

- John Blakeman, Stakeholder Liaison
- Mercean Lam, Stakeholder Liaison
- Lisa Novack, Stakeholder Liaison
- Kristen Hoiby, Stakeholder Liaison
- Jacqueline Schmidt, TAS NM
- Sarah DeBurle, TAS WA

Practitioner Representatives

- Jeremy Saladino, WA
- Brian Hein, OR
- Robin Smith, WSTC
- Steven Fox-Middleton, WA
- Lisa Rogers, AKSCPA
- Ami Oppe, AKSCPA
- Elliot Gidan, CO
- Kate Grubb, WSSEA
- James Adelman, NAEA, OSEA
- Doug Henne, OSCP
- Barbara Culver, WSSEA
- Dale Marino, OATC
- Ellen Briscoe, NMSEA, NATP
- Mark Neumeister, OK
- Michael Davidson, ORSEA
- Edwin del Carpio, WA
- Vera Likhonin, STA, WA
- Robin Harris, OK
- Sarah Northcutt, OSCP
- Cynthia Polley, WA
- Melissa Burr, OSCP
- David Freeland, AAATP
- Carol Wild, OATC
- Gail Baudendistel, WA
- Harriet Strothers, OSCP
- Heather Jackson, OSCP
- LaVeta Scherer, WA NATP
- Katrina Anderson, OSCP
- Shawn Mattingly, WA
- Benita Mairs, WAATP
- Rebecca Lammers
- Greg Nunn, WA

- Melissa Rainwater-Flemming

## Meeting Summary

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### IR 2023-169: ERC claims processing paused

Amid rising concerns about a flood of improper Employee Retention Credit claims, the Internal Revenue Service today announced an immediate moratorium through at least the end of the year on processing new claims for the pandemic-era relief program to protect honest small business owners from scams.

The IRS continues to work previously filed Employee Retention Credit (ERC) claims received prior to the moratorium, but renewed a reminder that increased fraud concerns means processing times will be longer. On July 26, the agency announced it was increasingly shifting its focus to review these claims for compliance concerns, including intensifying audit work and criminal investigations on promoters and businesses filing dubious claims. Hundreds of criminal cases are being worked, and thousands of ERC claims have been referred for audit.

Payouts for these claims will continue during the moratorium period but at a slower pace due to the detailed compliance reviews. With the stricter compliance reviews in place during this period, existing ERC claims will go from a standard processing goal of 90 days to 180 days – and much longer if the claim faces further review or audit. The IRS may also seek additional documentation from the taxpayer to ensure it is a legitimate claim.

The IRS is developing new initiatives to help businesses who found themselves victims of aggressive promoters. This includes a settlement program for repayments for those who received an improper ERC payment; more details will be available this fall.

In addition, the IRS is finalizing details that will be available soon for a special withdrawal option for those who have filed an ERC claim but the claim has not been processed. This option, which can be used by taxpayers whose claim hasn't yet been paid, will allow the taxpayers, many of them small businesses who were misled by promoters, to avoid possible repayment issues and paying promoters contingency fees. Filers of these more than 600,000 claims awaiting processing will have this option available. Those who have willfully filed fraudulent claims or conspired to do so should be aware, however, that withdrawing a fraudulent claim will not exempt them from potential criminal investigation and prosecution.

Taxpayers are encouraged to review IRS guidance and tools for helping determine ERC eligibility, including frequently asked questions and a new question and answer guide to help businesses understand if they are actually eligible for the credit.

[Employee Retention Credit | Internal Revenue Service \(irs.gov\)](https://www.irs.gov/retirement-credits/erc)

The Internal Revenue Service continues to warn businesses to watch out for aggressive marketing by nefarious actors involving the Employee Retention Credit (ERC) and urged people to watch out for red flags that can signal trouble. Although promoters advertise that ERC submissions are "risk free," there are actually huge risks facing businesses as the IRS increases its audit and criminal investigation work. Hundreds of criminal cases are being worked, and thousands of ERC claims have been referred for audit.

The IRS sees wildly aggressive suggestions from marketers urging businesses to submit the claim because there is nothing to lose. In reality, those improperly receiving the credit could have to repay the credit – along with substantial interest and penalties.

Warning signs to avoid include:

- Unsolicited calls or advertisements mentioning an "easy application process."
- Statements that the promoter or company can determine ERC eligibility within minutes.
- Large upfront fees to claim the credit.
- Fees based on a percentage of the refund amount of Employee Retention Credit claimed. This is a similar warning sign for average taxpayers, who should always avoid a tax preparer basing their fee on the size of the refund.
- Preparers seeking anonymity by refusing to sign the ERC return being filed by the business as well as supplying their identifying information and a tax identification number. Similar to "ghost preparers," this limits the risk to just the taxpayer claiming the credit.
- Aggressive claims from the promoter that the business receiving the solicitation qualifies before any discussion of the group's tax situation. In reality, the Employee Retention Credit is a complex credit that requires careful review before applying.

Unscrupulous promoters may lie about eligibility requirements, including refusing to provide detailed documents supporting their computations of the ERC. In addition, those using these companies could be at risk of someone using the credit as a ploy to steal the taxpayer's identity or take a cut of the taxpayer's improperly claimed credit.

How businesses can protect themselves:

Businesses, tax-exempt groups and others being approached by these promoters can take simple steps to protect themselves from making an improper Employee Retention Credit.

- Work with a trusted tax professional. Eligible employers who need help claiming the credit should work with a trusted tax professional; the IRS urges people not to rely on the advice of those soliciting these credits. Promoters who are marketing this ultimately have a vested interest in making money; in many cases they are not looking out for the best interests of those applying.

- Request a detailed worksheet explaining ERC eligibility and the computations used to determine the ERC amount.
- Don't apply unless you believe you are legitimately qualified for this credit. Details about the credit are available on IRS.gov, and again a trusted tax professional – not someone promoting the credit – can provide critical professional advice on the ERC.

To report ERC abuse, people should mail or fax a completed Form 14242, Report Suspected Abusive Tax Promotions or Preparers, and any supporting materials to the IRS Lead Development Center in the Office of Promoter Investigations. Here is the page for reporting suspected tax fraud activity: [How Do You Report Suspected Tax Fraud Activity? | Internal Revenue Service \(irs.gov\)](#) and the link for Form 14242 can be found on this page [as well as other forms for other types of suspected tax fraud...check it out!]

### **Issues, Questions and Concerns:**

Issue: We heard from one preparer with 5 clients now, 1041 returns, with letter 3463C saying the return is not signed, but all have valid 8879s associated with them. Another preparer had a Form 709, Gift Tax Return client get the same letter, but it also had a valid 8879 associated with it [e-signatures are still valid for certain paper filed returns]

A: An interesting question, and not sure why this is happening. The Form 709 is understandable, with new employees not fully grasping that it can have an electronic signature these days, but the 1041s are another story. We will look into this.

Q: Any movement on the Form 56 question?

A: Just got the email from our IMRS person that W&I has the issue and is working it. She will let us know as soon as she gets a response.

Q: How can we get updated POAs into the system? Practitioner states she uploads updated POA [for other periods, for example], but when she tries to pull transcripts, they are not available.

A: We are not sure why this is happening, and will check into it.

Q: Is there a comprehensive list of what returns can be e-signed?

A: E-filed returns can accept e-signatures and some paper filed returns can also accept e-signatures these days. Here is the link to the page regarding e-signatures on certain paper forms: [Details on using e-signatures for certain forms | Internal Revenue Service \(irs.gov\)](#)

Question/suggestion: is there any way to look up the status of an ERC claim?

A: At the moment, there is not, other than calling the Business and Specialty Help Line at 800-829-4933, but even then, they might not know. We do understand that many claims were sent in quite a while ago, and there is a need to understand how the processing is moving along. Please understand that there is a lot going on at IRS right now regarding the Employee Retention Credit and the numerous claims being submitted, and we will keep you posted as to how things are progressing.

Another suggestion is to continue monitoring the IRS Operations page for the processing status of these returns. [IRS Operations: Status of Mission-Critical Functions | Internal Revenue Service](#)

As of September 21, 2023, there were 9,000 unprocessed Forms 941. If you filed electronically and received an acknowledgement, you don't need to take any further action other than promptly responding to any requests for information. These tax returns are processed in the order received. Please don't file a second tax return.

As of September 20, 2023, our total inventory of unprocessed Forms 941-X was approximately 735,000 some of which cannot be processed until the related 941s are processed.

**Next Scheduled Meeting; Wednesday, October 18, 2023**





## **New Mexico Society of Enrolled Agents October 2023 Conference**

Wednesday 10/25 (7:30AM – 5PM)  
And Thursday 10/26 (7:30AM – 5 PM)

Featuring In-person Speakers:

Laura Strombom, EA, USTCP	Ranchers & Farmers
	Corporate Transparency Act
	Community Property Rules
	Short Term Rentals
Lelah Martinez	IRS Liaison Report
Lynne Shupp, EA, RFC	Ethics
Earl Collison, EA &	Foreign Tax/Income Issues
Therese Francis, EA	

You have the choice of attending either virtually or in-person at  
Courtyard by Marriott  
5151 Journal Center Blvd NE  
Alb, NM 87109  
(In-Person Check-in 7:30 - 8 AM)

Hotel is offering a special group rate for \$154 per night

**[Book your group rate for NMSEA](#)**

Reservations and additional information can be found at Eventbrite

**<https://tinyurl.com/Register-NMSEA-Oct-Conference>**

Note: Registering online incurs Eventbrite fees as shown on the Ticket webpage  
(or register by Mail-In Form at Attachment 5)

Attachment 4



## New Mexico Society of Enrolled Agents October 2023 Conference

NMSEA is offering 16 CE hours. Attend Virtually or In-Person (your choice).  
Courtyard by Marriott, 5151 Journal Center Blvd NE, Alb, NM 87109.

**Wednesday 10/25/23 & Thursday 10/26/23 (8 AM – 5 PM)**  
**In Person Check-in (7:30 – 8 AM)**

Circle your choices:

NMSEA member Early Bird (expires 10/14/23)	\$350
NMSEA member - Late Bird	\$375
Non-member Early Bird (expires 10/14/23)	\$400
Non-member Late Bird	\$475
Printed Materials	<u>\$ 70</u>
Total	

Complete this registration form and submit:

Mail to NMSEA, PO Box 30974, ABQ, NM 87190-0974 or Fax to 505-298-2191

Name \_\_\_\_\_ PTIN \_\_\_\_\_

Member of NMSEA Yes No Attending? Virtually In-Person

I prefer to pay by credit card. Please charge my Visa \_\_\_\_\_ MC \_\_\_\_\_ Amer EX \_\_\_\_\_

Card# \_\_\_\_\_

Expiration date \_\_\_\_\_ Security Code \_\_\_\_\_ Zip Code \_\_\_\_\_

Email \_\_\_\_\_ Phone \_\_\_\_\_

Signature \_\_\_\_\_