



# Oregon Taxpayer Advocate Office

## 2022 Annual Report

Codi Trudell, Taxpayer Advocate

February 2023

# Agenda

- 01** Description of the Office
- 02** Taxpayer Inquiries and Cases
- 03** Taxpayer Advocate Highlights
- 04** Notable Achievements
- 05** Key Recommendations

# Taxpayer Advocate Office

- Assist taxpayers with inquiries
- Evaluate complaints and recommend improvements
- Identify barriers to equitable service
- Represent taxpayers' interests in policymaking



# Taxpayer Advocate Office



Taxpayer Advocate



Research Analyst 4



Bilingual Public Service Representative 4



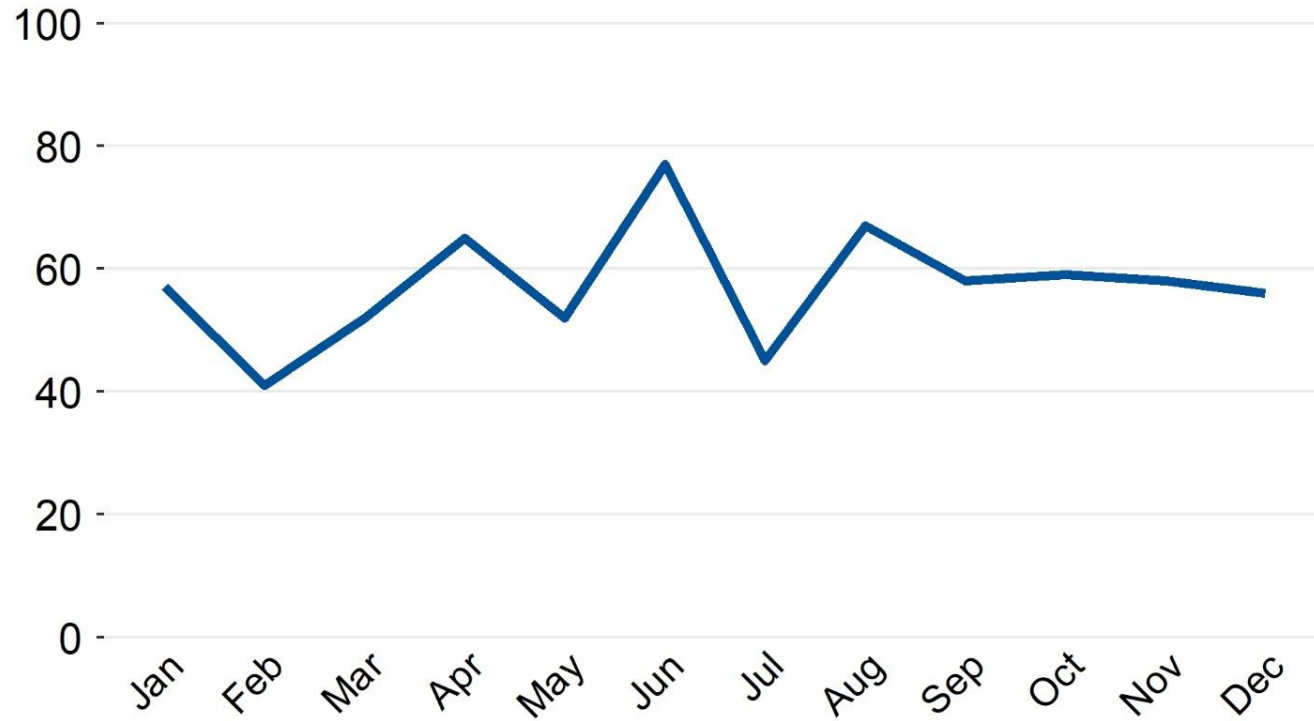
# Report

- Legislative submission every odd year
- Complaints
- Resolution
- Service evaluation by taxpayers
- Identify barriers
- Recommendations for Oregon tax law
- Effectiveness of Taxpayer Advocate Office
- Posted in five languages on website

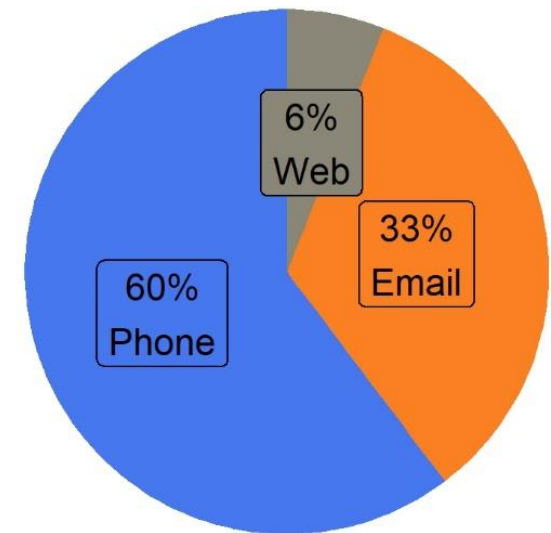


# Taxpayer Inquiries & Cases

## Monthly Inquiries



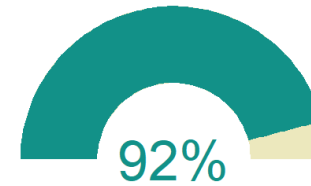
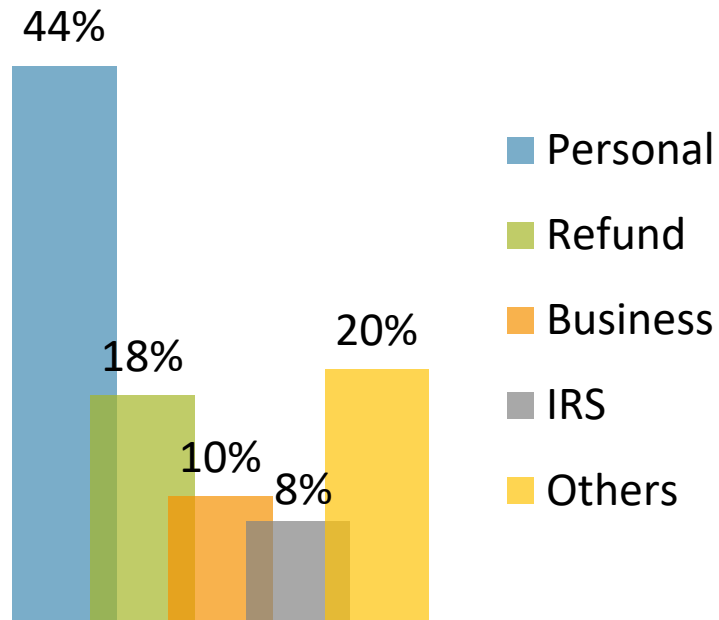
## Inquiry Sources



Total Inquiries: 687

# Taxpayer Inquiries & Cases

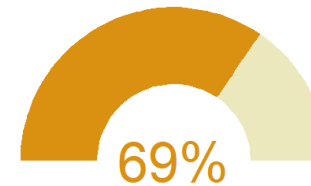
## Inquiry Types



Inquiries closed within 7 days

10%

Inquiries elevated to cases



Cases closed within 14 days

25%

Cases resulting in DOR process change

# Taxpayer Advocate Highlights



Opening the Taxpayer Advocate Office (January 3, 2022)



Digital “Your Rights as a Taxpayer” document and webpage



Outreach (digital and in-person) and community partnerships



# Notable Achievements



**Strategic Planning Initiatives:** plans to upgrade phones, improve correspondence



**Refund Check Forgery Claims:** updating policy for better taxpayer experience



**Returned Mail:** steps to save mailing costs and improve address updating



**Settlement Offers:** support “Proactive Settlement Offers” plan, improving service

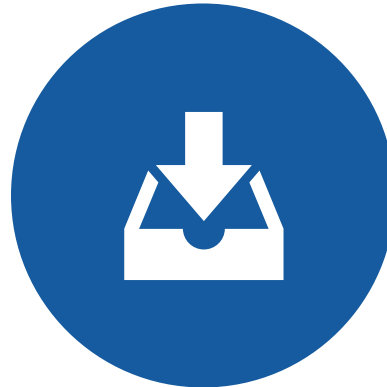
# Key Recommendations

Issue: Refund  
Delays



Rec: Evaluate process to meet timelines, give taxpayers more specific info

Issue: Unanswered  
Questions



Rec: Assign inquiries to appropriate phone staff, cross-train to improve service

Issue: No Free Small  
Business Tax Assistance



Rec: Identify opportunities for DOR to fund/provide small business tax assistance

# Additional Recommendations

Issue: Complicated  
Property Tax Laws



Rec: Until changed, tax laws will remain complicated but seek opportunities to aid taxpayer understanding of these laws

Issue: DOR Communication  
For Tax Representatives



Rec: Seek opportunities to send correspondence to taxpayers and their representatives

Issue: Confusing Power of  
Attorney Form



Rec: Continue with form redesign efforts and TAO recommendations

# Summary

## Taxpayer Advocate Office inaugural year:

- Enhanced services to taxpayers
- Created opportunities for DOR to proactively connect with taxpayers
- Changed policy to increase equity and ease compliance

*“I am really glad Oregon finally created this office as this was extremely helpful.”*

*“Both of us have been filing and paying for over 50 years each. Your attention to all the matters we discussed on the phone AND the update on our status with DOR is deeply appreciated and noticed.”*

*“Wow, you all are truly amazing! My wife and I have a number of other things going on so knowing this is resolved and one less thing to worry about is truly appreciated. Thank you!”*



## Questions?

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