Taxpayer Advocate Update

September 2022

Taxpayer Advocate Office fields 358 inquiries in first eight months

In its first eight months, Oregon’s Taxpayer Advocate Office (TAO) has provided a wide range of services to the state’s taxpayers.

- As of August 31, the TAO has received 358 inquiries.
- Half of all inquiries are related to personal income tax
- 72 percent of those inquiries are made by phone, 25 percent by email and 2 percent by mail
- Most matters are resolved at the inquiry level. The matters that require more research, examination, and extra attention to determine a resolution and outcome are deemed a “case.” As of August 31, we had a total of 80 cases. Forty-one are open and 39 have been closed.

The most common inquiries arise from situations where the taxpayer feels they have not received or have been unable to receive an answer to their question. Often, the taxpayer advocate team can help redirect them, encourage a response from the appropriate department or do the research within the taxpayer advocate office for more complicated matters. It’s common to discover the taxpayer needs a different agency or resource that is separate from the Department of Revenue.

Two specific examples of our work include:
- Helping a taxpayer receive the $6,000 refund they were due. When the taxpayer called, the taxpayer advocate investigation discovered a system error. Correcting the error involved the collaboration of multiple agencies to correct and could have been difficult to accomplish with normal department resources. The taxpayer advocate’s authority and resources helped move the process along quickly.
- Assisting a business with the removal of a penalty assessed in error. The review by the taxpayer advocate and discussion with the appropriate unit also led to a new process to prevent this specific error from occurring for taxpayers again.

The taxpayer advocate also works within agency to examine if current and potential processes or procedures could better serve taxpayers. Examples include, working on making letters to taxpayers easier to read, reviewing our processes with eye to creating clear and easy customer experience, and establishing ways to work with community partners.

Examples of systemic changes resulting from the work of the taxpayer advocate:
• The taxpayer advocate frequently hears the need for small business tax assistance. There are many free options for individual tax filers but not many for small businesses for which the financial burden can be quite great. The taxpayer advocate is working with community partners to identify and seek out solutions for small businesses in tax peril.
• The percentage of Oregon taxpayers who take advantage of the federal Earned Income Tax Credit (EITC) is low. The taxpayer advocate is working with other agencies and community partners to recognize ways to increase the uptake rate for Oregon’s most vulnerable populations.
• The taxpayer advocate works to educate taxpayers and department staff on taxpayer rights; including providing information on taxpayers’ specific rights in multiple languages.

Ultimately, it’s helping taxpayers that gives the Taxpayer Advocate Office staff its greatest satisfaction.

Some quotes from taxpayers we have helped:
• "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!"
• “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.”

When we hear compliments like these, we know we are doing the kind of work the Legislature had in mind when it created this office.

Codi Trudell
Oregon Taxpayer Advocate