



DRAFT 14th Annual IRS/TPC Joint Research Conference on Tax Administration June 13, 2024

8:00 – 8:30 **Breakfast/Check-In**

8:30 – 8:45 **Opening**

Tracy Gordon (Co-Director, Urban-Brookings Tax Policy Center)

Barry Johnson (Chief Data and Analytics Officer,
Research, Applied Analytics and Statistics (IRS))

8:45 – 10:15 **Session 1: Harnessing Data for Better Research**

Moderator: **Brittany Jefferson** (IRS, Wage and Investment)

▪ **Improving Linkages to Individual Income Tax Data**

Amy O'Hara, Stephanie Strauss, Maanasa Vatsavayi, Nathan Wycoff (Georgetown University)

▪ **A Large Scale, High Quality US Occupational Database: Results from Merged IRS and ACS Write-Ins**

Victoria Bryant, Thomas Hertz, Kevin Pierce (IRS, RAAS); Julia Beckhusen, Lynda Laughlin, Liana Christin Landivar, **Carl Sanders** (US Census Bureau); Josh Gagne, David Grusky, Sofia Jamesson (Stanford University); Michael Hout (New York University); Ananda Martin-Caughey (Brown University); Javier Mirand (University of Jena)

▪ **Disaggregating Tax Compliance Burden: A Comparative Study**

Bizuayehu Bedane (IRS, RAAS)

Discussant: **Leonard Burman** (Urban-Brookings Tax Policy Center)

10:15 – 11:45 **Session 2: Discovering the Art of Avoidance**

Moderator: **Devi McKalko** (IRS, RAAS)

▪ **Using a Gravity Model to Predict Cross-Border Tax Avoidance**

Lori Stuntz, **Michael Udell** (IRS, RAAS)

▪ **Art in the Age of Tax Avoidance**

Matthew Pierson (The Wharton School, University of Pennsylvania)

▪ **Staying on the Wagon: Estimating Indirect Deterrence Effects from Filing and Payment Compliance Programs**

Brett Collins, Chris Wilson, Corbin Miller, Mark Payne, Sean Roh, Yan Sun,
Alex Turk (IRS, RAAS)

Discussant: **William Boning** (U.S. Department of the Treasury)

11:45 – 12:15 **Break/Lunch**



12:15 – 12:45 **Keynote Speaker**

Daniel Werfel (*Commissioner of Internal Revenue*)

12:45 – 1:00 **Break**

1:00 – 2:30 **Session 3: Trusting the Tax Man: Metrics, AI, and Audits**

Moderator: **Melissa Vigil** (*IRS, RAAS*)

- **Measuring Success: New Performance Metrics for a New Internal Revenue Service**

Janet Holtzblatt (*Urban-Brookings Tax Policy Center*)

- **Assessing Demographic Fairness in the Selection of Tax Returns for Audit**

Thomas Hertz (*IRS, RAAS*)

- **Tools to Promote Trustworthiness in a Prototype AI System at the IRS**

Michael Szulczewski, *M. Feldman, Steffani Silva (MITRE); Brandon Anderson, Tomas Wind (RAAS)*

Discussant: **Arnstein Øvrum** (*Norwegian Tax Administration*)

2:30 – 4:00 **Session 4: Simplifying the Filing Burden**

Moderator: **John Guyton** (*IRS, RAAS*)

- **Technical Challenges in Maintaining Tax Prep Software with Large Language Models**

Sina Gogani-Khiabani, *Varsha Dewangan, Ashutosh Trivedi (CU Boulder); Nina Olson (Center for Taxpayer Rights); Saeid Tizpaz-Niari (UT El Paso)*

- **Rethinking Tax Information: The Case for Quarterly 1099s**

Kathleen DeLaney Thomas (*UNC School of Law*)

- **Investigating the Impact of Free E-File Letter Intervention on Taxpayer's Tax Filing and Preparation Methods**

Pei-Hua Chen, *Astin Cornwall, Anne D. Herlache, Scott Leary, Brenda Schafer, Melissa Vigil (IRS, RAAS); Rizwan Javaid (IRS Taxpayer Experience Office)*

Discussant: **Robert Weinberger** (*Urban-Brookings Tax Policy Center*)

4:00 – 4:05 **Wrap-up**

Barry Johnson

(*Chief Data and Analytics Officer, Research, Applied Analytics, and Statistics (IRS)*)

**Bolded names indicate presenters*