

**Taxpayer Advocacy Panel  
Joint Committee  
Meeting Minutes  
August 25, 2011**

**Designated Federal Official**

- Shawn Collins TAP Director
- Steve Berkey Senior Program Analyst

**Members Present**

- Thomas (Tom) Walker TAP Chair
- John Kim TAP Vice Chair
- Gerald (Jerry) Stepner Chair, Area 1
- Susan Lynn Chair, Area 3
- Mary Jo Werner Chair, Area 4
- Ken Donnelly Chair, Area 5
- Harlan Barnett Chair, SBSE-Toll Free
- Herb Bohrer Chair, TAC
- Ernest Miller Chair, Notices
- Mary Jean Potenzzone Chair, SBSE-Practitioners Experience
- David Cain Chair, Area 2
- Donald Thomas Chair, Forms and Pubs
- Erica Webber Chair, EITC
- Stephen Vanderver Chair, VITA
- Susan DaCorte Chair, Communications

**Members Absent**

- Anne Rasmussen Chair, Area 6
- Patricia (Patti) O'Neill Chair, Area 7

**Staff Present**

- Susan Gilbert Senior Program Analyst
- Linda Rivera Senior Program Analyst
- Meredith Odom Program Analyst
- Russ Pool Database Analyst
- Otis Simpson Budget Analyst
- Nancy Ferree Program Manager
- Roy Block Program Manager
- Audrey Jenkins Program Analyst
- Marisa Knispel Program Analyst
- Lisa Gabriel Program Analyst
- Ellen Smiley Program Analyst
- Marianne Ayala Program Analyst



- Donna Powers Program Analyst
- Anita Fields Program Analyst
- Patti Robb Program Analyst
- Tim Shepard Program Analyst
- Leasia Brooks Secretary

**Guests**

- Rodger Lees Area 2
- Deidre Jackson Area 3

**Members of the Public**

None

**Welcome/Announcements/Review Agenda**

Tom Walker opened the meeting and welcomed everyone.

**Roll Call**

Leasia Brooks took roll call and quorum was met.

**Approval July Joint Committee Meeting Minutes**

Minutes were approved by consensus.

**Review of Action Items—Tom Walker**

Tom Walker reviewed the July meeting action items.

Action Item: Walker will send out guidelines of the information needed for the report previously requested from the chairs.

Walker stated the Annual report has been delayed due to difficulty in obtaining information from the Area Chairs. Area activities are winding down; Walker asked the chairs to summarize data and put a draft report together. Walker stated there will be a detailed discussion held at next month's call.

**Action Item:** Susan Gilbert will add the evaluation of member performances to next month's meeting agenda.

**National Office Report—Steve Berkey**

Berkey announced Linda Rivera, TAP Senior Analyst, will act as the Seattle, WA Manager.

The Annual report will be submitted to the printer no later than tomorrow. The project proposals have been given to NTA Nina E. Olson, and are awaiting approval for submission to the IRS. Berkey announced the tax forums have been effective sources of outreach for TAP.

### **TAP Chair Report—Tom Walker**

Walker reminded members that IRS Live will be held Wednesday, August 31, 2011. Commissioner Douglas Shulman will open this year's IRS Live session.

Walker stated issues that require Joint Committee approval should be taken care of by the November Joint Committee call. Issues that need to be elevated to the IRS should be submitted prior to the Annual Meeting. The goal is to be 100 percent complete and closed on small issues by the Annual Meeting this year.

Berkey announced TIGTA is interested in receiving input from the Taxpayer Assistance Center Committee. TIGTA will be reviewing how the IRS can provide better alternatives for taxpayers to obtain information from the IRS to file their returns.

Action Item: Roy Block will schedule a meeting for Herb Bohrer with TIGTA to share his thoughts.

### **Area Issues for Review**

#### Area 7

**Issue #20080 VITA Training Should Be Simplified** – John Kim provided a brief background on the issue, the committee's suggestion is to simplify the training guide by dividing the training into two sections: Basic and Advanced.

The committee expressed concern about the issue being rejected due to a previous similar issue that was submitted.

**Decision** – The Joint Committee by consensus, returned the issue to Area 7 for comparison with a previous VITA recommendation.

**Action Item:** Donna Powers will send Janice Spinks the VITA recommendation from last year, and the response received.

#### SB/SE

**Project #19637 ICM Referral**—Rodger Lees stated the committee's task was to evaluate the content, clarity, and script routing of IRS Intelligent Contact Management system scripts and messages that individual taxpayers encounter as a result of going through the examination process. The committee interacted with Carol Spencer to develop a method to track script changes, how it was evaluated, the current state in the ICM system, changes needed, and the final product.

The team developed the referral in three tiers:

- Evaluate the script/Make recommended changes
- Evaluate the flow of data through the ICM system
- Identify new Self-Help Items

Lees stated many of the script recommendations are being incorporated into an update that will occur within the ICM system in January 2012.

**Decision** – The Joint Committee, by consensus, approved the project to go final.

**Action Item:** Lees, Tim Sheperd and Harlan Barnett will meet on preparing the project for IRS presentation.

**Project #19638 Suggested Improvements to Self-Help C.E. Toll Free Line** – Diedre Jackson stated the committee’s task was to find additional Self-Help options to add to the existing script on the toll free line. The committee listened to the scripts as designed, as well as followed a written script to ensure the message was consistent. The committee also made test calls into the toll free line during low call volume times to get a feel of what taxpayers are experiencing relating to consistency of instructions, wait time, the overall ease of use, and customer service. The committee also analyzed the most recent customer satisfaction surveys to find out what issues were revealed in the surveys. The committee reviewed the information provided on the Phone Optimization Project (POP) Initiative for Fiscal Year (FY) 2009, and the National Quality Review System’s (NQRS) “Reason for Contact Report.”

The panel recommends the following new Self-Help options:

- Appendix A: Request for Extension of Time
- Appendix B: The Status of My Exam
- Appendix C: Development of Website & Social Media

**Decision** – The Joint Committee by consensus, approved the project.

## **Tax Forms & Pubs**

### **Project #21325 Review of Publication 334**

**Project #21674 Review of Form 4562**—Donald Thomas stated the committee reviewed Form 4562, *Depreciation and Amortization* and Publication 334, *Tax Guide for Small Business*. Both have been submitted to the IRS.

The committee received notification that the SSA 1099 recommendation was adopted by the IRS and will be implemented on October 17, 2011. Publication 946, *How to Depreciate Property* has been submitted and is awaiting approval from the IRS. The committee is scheduled to have a focus group with the IRS on September 1, 2011.

**Decision** – The Joint Committee by consensus, approved the projects.

## **VITA**

**Project #19401 Improving Internal & External Awareness of FEAB** – Stephen Vanderver stated there were three proposals by VITA: Financial Education Asset Building, Alternative Methods, and Training. The proposal is to survey successful key partners (both internal IRS and external IRS) to discover best practices, summarize these practices, and ensure these practices are shared with new partners or lesser performing partners to assist with program improvement.

The committee recommended rebranding FEAB as an effort to bring awareness to the program.

**Decision** – The Joint Committee by consensus, approved the project.

**Project #19402 VITA Alternative Methods of Filing Returns** – Stephen Vanderver provided a brief background of the issue, the committee’s suggestion is to find alternative methods to augment the VITA tax preparation site. Some suggestions included self-help kiosks, more vendors to participate, and to encourage the tax preparer community to do pro-bono tax preparation for taxpayers. As an incentive, IRS could develop a means of rewarding or recognizing pro-bono services provided.

The committee suggested expanding self-help programs with the VITA/TCE program. SPEC could engage companies, social organizations, large service or religious congregations, and similar groups to participate in the program. Eventually, these organizations could train participants versed in taxes and accounting or use VITA/TCE training programs and continue the program.

**Decision** – The Joint Committee by consensus, approved the project.

**Project #21939 VITA Grant Application** – Stephen Vanderver provided a brief background on the project. The committee’s suggestion is to allow FEAB Partners to use up to 5 percent of VITA Grant money towards offering or expanding FEAB services, which would include education and the development of training materials and/or FEAB services.

**Decision** – The Joint Committee by consensus, approved the project.

## **TAP Refocus**

Walker stated he had the opportunity to participate in all seven Area calls. He stated he only received two comments in reference to change. Jackie Rollins asked if there would be an opportunity for members to be reassigned to a different committee mid-year. Walker opened the floor for Joint Committee consideration and discussion of the issue. The Joint Committee agreed reassignment will be approved on a case- by-case basis.

Walker stated the Communications Committee members suggested making the committee a standing committee with the chair serving as a member of the Joint Committee. Members also suggested that serving on the Communications Committee should be considered an additional obligation to serving on a project committee.

**Decision**—The Joint Committee, by consensus, approved modification to the Communications Committee.

### **TAP Style Guide**

Harlan Barnett stated the TAP Style guide is in process and requested the committee provides corrections via email and will be reviewed during the September call.

**Action Items:** Susan Gilbert will add the TAP Style Guide discussion to the September Agenda.

### **Recruitment**

Berkey stated there will be 23 new members next year. Eleven of the new members are from this year's new applicants. Twelve of the new members are from the alternate list. The list has gone forward for new member appointments and will be approved no later than mid-late October.

### **Mentor/Mentee**

Walker stated mentors will be assigned through the project committee structure. Walker requested the TAP Managers inform each mentor that they are responsible for contacting the new members prior to the Annual meeting.

**Action Item:** Linda Rivera will establish a follow-up plan for the Mentor/Mentee program.

### **Annual Meeting**

Susan Gilbert stated the member and staff team met on August 18, 2011, and finalized the agenda. The general meeting will begin on Tuesday and will consist of split plenaries. However, there will be classes everyone will attend to teach new procedures resulting from the Refocus. The general meeting will end on Thursday at 11:15. Everyone will be dismissed with the exception of Screening Committee members, Outreach Committee members, the new Joint Committee, and instructors for those sessions. Orientation will be Monday from one to five.

Berkey requested the members consider planning the Project dinners at the Annual Meeting.

### **Public**

None

### **Closing**

Meeting Adjourned.

**Next Meeting: September 22, 2011.**