

**Joint Committee (JC)  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
April 23, 2020**

**Designated Federal Official (DFO)**

- Terrie English TAP Director

**Members Present**

- Tracy Bunner Chair, Notices and Correspondence
- Lindsey Funair Chair, Taxpayer Communications Committee
- Philip “Phil” Kleiber National TAP Chair
- Robert “Bob” Moretti National TAP Vice-Chair
- Andrea Price Chair, Toll-Free Phone Lines Committee
- Stephen Selden Chair, Tax Forms and Publications Committee
- Nina Tross Chair, Taxpayer Assistant Centers Committee
- Cheryl Williams Chair, Special Projects Committee
- TBD Chair, Internal Communications Committee (ICC)

**Visiting Members**

- Jim Buttonow Vice Chair, Taxpayer Communications Committee
- Terrel Flake Member, Toll-Free Phone Lines Committee
- Tom Kerr Member, Toll-Free Phone Lines Committee
- Thurston Smith Vice Chair, Taxpayer Assistant Centers Committee
- Charles Jones Member, Notices and Correspondence

**Staff**

- Lisa Billups Program Analyst
- Kevin Brown Management Assistant
- Cedric Jeans TAP East Chief
- Susan Jimerson TAP West Chief
- Gilbert Martinez Program Analyst
- Rosalind Matherne Program Analyst
- Matthew O’Sullivan Program Analyst
- Robert Rosalia Program Analyst
- Antoinette “Toni” Ross Program Analyst
- Fred Smith Program Analyst
- Debra Awalt Program Analyst Wage and Investment (W&I)
- Tamikio Bohler Program Analyst W&I
- Cynthia “Cindy” Jones Manager W&I

**Members of The Public**

- Dominic Concilio
- Vanier Stafford

## **Welcome, Review Agenda**

English welcomed everyone and opened the call. Kleiber reviewed the agenda.

## **Roll Call**

Quorum was met for the meeting.

## **DFO/National Office Update**

English reiterated the IRS Commissioner's webinar, which was postponed until further notice. English spoke of information constantly changing regarding the COVID-19 crisis and the staff providing the most up to date information to the committee that we can. For now, [www.irs.gov/coronavirus](http://www.irs.gov/coronavirus) is the website that Internal Revenue updates daily regarding this ongoing crisis.

## **TAP Managers Update**

Jimerson reminded the committee that an email was sent soliciting volunteers for a Volunteer Income Tax Assistance (VITA) product review project. Please respond by close of business tomorrow to Matthew O'Sullivan. The first ICC will be held April 28, 2020, at 3p.m. ET. Please join the call or send an email to O'Sullivan or Jimerson if you would like to join the committee.

Jeans reported the survey about the virtual TAP introductory meetings are being sent out and this process will be open until May 2, 2020. Please urge your committees to complete this survey.

## **Set Dates & Times for 2020 JC Meetings**

Fourth Thursday of the month at 1:30 p.m. ET. The November meeting will occur on November 19, 2019, due to the Thanksgiving holiday.

## **Approval of November 21, 2019 JC Meeting Minutes**

Williams motioned; Price seconded. Minutes accepted as submitted.

**Action:** Minutes are approved as submitted.

## **TAP Chair Report**

Kleiber reviewed how referrals will move through the joint committee:

1. The project committee Chair presents the referral
2. The voting members will make a motion.
3. The motion will be seconded.
4. There will be discussion, if necessary.
5. Then the committee will vote on the referral

Kleiber explained that all TAP members may join the JC call, but there are only nine voting members: the six project committee Chairs, the ICC Chair, the National Chair and Vice-Chair. Additionally, all visiting members must wait to be called upon before speaking during the meeting. Kleiber also indicated that both the Chair and Vice-Chair will be attending other committee meetings throughout the year, giving the Chair notice beforehand. These will be observation only unless the committee chooses to call upon them to speak.

Kleiber reiterated the JC role is:

- To review and approve project committee recommendations.
- Approved recommended policy and procedural changes.
- Coordinate the project committee activities.

- Represent the consensus view of TAP in public statements.
- Communicate decisions to the TAP members.
- Prepare the Annual Report.

### **TAP Vice Chair Report**

Moretti thanked especially first year members chairing their committees

Moretti announced Outreach committee meeting will meet on the third Thursday at noon ET each month. The committee is reviewing the outreach toolkit folder to ensure it is up to date. They will focus on ensuring the National Taxpayer Advocate (NTA) is up to date and not referring to the former NTA.

Moretti asked the Chairs to please speak about outreach and any issues to the outreach report form which is being addressed at this time. Once the ICC is up and running, they will be asking each committee for a report for the TAP monthly newsletter. Kleiber shared, that for last year, he delegated that duty to each committee member to allow for shared responsibility throughout the committee. Moretti reported that business cards have been ordered. English added that this process has been tabled while the stay at home order is in place.

### **Public Comments**

None

### **Project Committee Review/Activities**

#### **Tax Forms and Publications**

Selden presented issue 42395 Third Party Designee Sections and the Paid Preparer Use Only. Selden motioned; Williams seconded.

Action: Issue elevated to IRS for consideration

Issue 42292- For future reference, this type of document should be marked as a draft, so the committee understands what the committee has done with this project per Kleiber.

#### **Taxpayer Communications**

Buttonow presented issue 40224- Provide TAP Link on www.IRS.gov Website. Funair motioned; Williams seconded. There was a discussion about this link going to the top line of the site, but that will not be requested.

Action: Issue elevated to IRS for consideration

42334- Taxpayer Communication and Online Tool to Address CARES Act Stimulus Payments. Buttonow indicated the purpose of this referral is to get one message, via a distributable video, that is the official IRS position to go to all local news organizations as a clear IRS communication. Bohler shared that there are a number of YouTube videos on this topic already existing. Jones shared that the site [www.Usa.gov/coronavirus](http://www.Usa.gov/coronavirus) has what all the federal government is doing related to COVID-19 situation. Awalt suggested looking at news releases. Funair motioned; Tross seconded.

Action: Issue elevated to IRS for consideration

#### **Taxpayer Assistance Center Improvements**

Tross presented issue 40782- Improvement to Taxpayer Assistance Center (TAC) webpage with addition of Google Maps. There are many improvements needed to help taxpayers who rely on these mapping tools to get them to the IRS offices. Tross motioned; Price seconded.

**Action:** Issue elevated to IRS for consideration

### **Notices and Correspondence**

Tracy Bunner is working on four different projects with two projects may be ready for the next JC meeting. The other three are in various stages of preparation.

42413- being worked  
42425- being worked  
42225- almost done

### **Special Projects**

Cheryl Williams reported the following issues being worked:

41749 Difficulty in filing taxes outside of the USA- being worked  
41535 Practitioners revealing Social Security Numbers- being worked  
41296 Quick withdrawal of Power of Attorney- being worked

### **Toll-Free Lines**

Andrea Price is working three issues carried forward from last year:

40558 Instituting a Public Service Announcement directing taxpayers to [www.improveirs.org](http://www.improveirs.org)- The committee is drafting a rebuttal to this rejection.  
40707 International taxpayers' concerns- The committee is considering next steps since it was rejected.  
40124 Addressing complaints being disconnected from calls on the IRS toll-free phone lines. This was rejected and the committee is considering next steps.

### **Internal Communications Committee**

O'Sullivan reported that the first meeting is set for Tuesday, April 28, 2020.

### **Round Table**

Kleiber and Moretti thanked the committee for all their efforts and reminded the committee to put referrals forward they think will help or improve the taxpayer experience and allow the IRS to accept or reject them.

Tross requested getting the NTA on the JC call, English reported that she will make that request but it will not be easy to get on the NTA's calendar. English also explained that it is protocol for TAP to request a slot on the NTA's calendar, which is we have made for this year. English reported that our initial request was for the face to face meeting before it was canceled.

### **Closing**

English thanked everyone for their efforts on the call and closed the meeting.

**Next Joint Committee Meeting is May 28, 2020 at 1:30 p.m. ET**