

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
August 27, 2020**

Designated Federal Official (DFO)

- Terrie English TAP Director

Members Present

- Laurie Brock Chair, Internal Communications Committee (ICC)
- Tracy Bunner Chair, Notices and Correspondence
- Lindsey Funair Chair, Taxpayer Communications Committee (Absent)
- 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 (TAC)
- Cheryl Williams Chair, Special Projects Committee

Visiting Members

- Donna Burris Member, Toll-Free Phone Lines Committee

Staff

- Lisa Billups Program Analyst
- Kevin Brown Management Assistant
- Conchata Holloway Program Analyst
- Susan Jimerson TAP West Chief
- Antonia “Toni” Keeling Program Analyst
- 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)
- Cynthia “Cindy” Jones Program Analyst W&I
- Michael Odom Program Analyst

Members of The Public

None

Welcome, Review Agenda

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

TAP Chair Report

Skipped report due to the planning meeting earlier this week.

TAP Vice Chair Report

Passed on the report due to planning meeting earlier this week

Roll Call

Quorum was met for the meeting.

DFO/National Office Update

English reported:

There will be report out changes from the Federal Advisory Committee Act coming soon. These changes will make more of the TAP information such as meeting information and minutes available to the public. Once they are finalized, English will provide them to the committee. English thanked everyone for attending the JC Planning meeting earlier this week.

TAP Managers Update

Jimerson reported:

Last year the ICC and Outreach committees worked together to develop a social media guide. This has information on how to setup and start social media guides and establishing a social media presence. This will be posted in the Outreach Toolkit on www.tapspace.org. Ask Jimerson if you have any questions. The TAP logo will be discussed for the new TAP website that is being developed.

Approval of July 23, 2020 JC Meeting Minutes

Minutes approved as submitted. Kleiber motioned; Williams seconded.

Action: Minutes are approved as submitted.

Public Comments

None

Project Topic

- TAP BYLAWS – need to approve

Page 4 Section C Leadership paragraph two:

When there are more than 2 candidates running for the same position, the winner is declared by plurality voting (the person with the most votes). When there are less than 2 candidates running for the same position, the winner must win by a simple majority more than half the votes casted).

Page 5 Section V C. Decision Making Process

Clarification on Consensus decision making definition pertaining to voting. Price asked, If the decision-making process is done by consensus, why are we making motions and seconding them to make votes? This question will be sent to legal for clarification. Kleiber motioned; Tross seconded.

Action: Question sent back to legal for clarification.

- TAP LOGO – need to make a choice

First Choice: Unanimous decision

Second Choice: No votes

Project Committee Review/Activities

Tax Forms and Publications

Selden reported:

41886- Dropped by committee.

42047- Reporting Dividends on Form 1040/1040-SR and Schedule B
Change proposed to allow qualified dividends to be calculated correctly on form.
Submitting taxpayer's contact information removed from the referral.
Selden motioned; Brock seconded
Action: Issue elevated as amended to IRS for consideration

42066 Reporting Social Security Benefits
Change proposed to simplify social security benefits calculations. Kleiber motioned; Brock seconded
Action: Issue elevated to IRS for consideration

42148 Suggestion for Worksheet Update
Proposed technical change regarding marriage to resident alien or nonresident alien proposed for clarity. Kleiber motioned; Tross seconded
Action: Issue elevated to IRS for consideration

42173 Form 2210 Instructions Line 8 Calculation Omission for 1040
Changes proposed to allow calculation of underpayment of estimated taxes to be accurate. Date approved by committee added to referral. Kleiber motioned; Brock seconded
Action: Issue elevated to IRS for consideration

Notices and Correspondence

Bunner reported:
Referral Issue 40908 Improve Notice Language (CP515)
Change suggested to take redundant wording out and shorten the document by one page.
Project committee approved date added. Bunner motioned; Williams seconded.
Action: Approved to elevate to IRS

Bunner reported there will be a referral to change the CP2000 that will be sent to the JC next month. They will be sending a recommendation to the Tax Forms and Publications committee regarding this issue also.

Taxpayer Communications

Funair reported:
Issue 37272 IRS Communications for Military Personnel
The recommendations are to improve military member's ability to comply with their tax obligations. Funair motioned; Brock seconded
Action: Issue elevated as submitted

Special Projects

N/A

Toll-Free Phone Lines

Price reported the committee has an issue related to the 1040 phone line tree. They are checking to see if that should be listed on the www.irs.gov website.

Taxpayer Assistance Center Improvements

N/A

Internal Communications Committee

N/A

Round Table

N/A

Closing

English thanked everyone for all the hard work that they give to this committee. The work is appreciated. English closed the meeting.

Next Joint Committee Meeting is September 24, 2020 at 1:30 p.m. ET

These minutes have been approved and certified by the committee chairperson.