

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
July 23, 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
- Jim Buttonow Vice-Chair, Taxpayer Communications Committee

Visiting Members

- Donna Burris Member, Toll-Free Phone Lines Committee

Staff

- Kevin Brown Management Assistant
- Conchata Holloway Program Analyst
- Cedric Jeans TAP East Chief
- 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)
- Tamikio Bohler Program Analyst W&I
- Michael Odom Program Analyst

Members of The Public

None

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 reported:

- Tax Forums being held now, going slow but well at this time.
- COVID-19 update- pay attention to donation scams and be careful who you donate to.
- August 13, 2020 is the date additional funds are going out to folks who did not get their entire stimulus payments.

TAP Managers Update

Jimerson reported:

- ICC Newsletter released.
- Toni Keeling's detail to TAP will conclude at the end of October, so someone else will have to complete the newsletter.
- Website design update going well.

Jeans reported:

- June Objective report released by National Taxpayer Advocate (NTA).
- Some of her objectives tie to our projects, be sure to reference this in your referrals
- Jeans will share this link with the committee today.

Approval of June 25, 2020 JC Meeting Minutes

Philip changed to "Phillip". Williams motioned; Bunner seconded.

Action: Minutes are approved as corrected.

TAP Chair Report

Kleiber spoke about reported 2019 issues were 427 and 2020 is 553. Most related to TACs being closed. Referral 2019 51 with 224 recommendations and 2020 has 22 referrals with 103 recommendations. Martinez will solicit participation for Annual Report committee support. Please let your committees know about this.

TAP Vice Chair Report

Moretti reminded everyone the activity reports and newsletter articles due on July 25, 2020. On the last Outreach committee meeting, the Outreach Toolkit review was completed. The final format will be posted very soon. A rundown of these changes will be sent out later. We expect less outreach from last year due to the pandemic.

Public Comments

None

Project Committee Review/Activities

Tax Forms and Publications

Referral Issues 41913- 2019 1040-SR - Standard Deduction Chart Needs

Correction. Recommendations made to improve clarity and taxpayer's experience.

Selden motion; Bunner Seconded.

Action: Issue elevated to IRS for consideration

41945-Mailing of Forms 1099 and 1096. Recommendations made to make form easier to understand and complete, improving the taxpayer's experience. Selden motioned; Buttonow seconded.

Action: Issue elevated to IRS for consideration

42267- IRS 1040 Instructions and Online Filing of Forms. Recommendations made to simplify completed this form and improve taxpayer's experience. Selden motioned; Bunner seconded.

Action: Issue elevated to IRS for consideration

42362- IRS Form 1040 Instructions, Pages 18 and 19. Recommendations made to clarify text and make the form easier to complete, thereby improving the taxpayer's experience. Selden motioned; Brock seconded.

Action: Issue elevated to IRS for consideration

43163- Self-Employment Tax - F1040 SCH SE. Recommendations made to make the form easier to complete for taxpayers. Selden motioned; Brock seconded.

Action: Issue elevated to IRS for consideration

Notices and Correspondence

Referral Issues 39806- CP 2000

Bunner reported Recommendations:

1. Emphasize this is not a bill in the beginning of the notice.
2. Clarify what the notice is about, being a proposed new balance.
3. Highlight what the taxpayer can do next to include proper address.
4. Give taxpayers options to include the setup fee options for installment agreements.
5. An option to alert the IRS that an installment payment agreement was setup online or the intent to pay in full within 120 days was added to the referral.

Jim Buttonow asked if the committee will address these two issues as they go forward:

1. For the CP 2000 will you address the penalty issue? CP 2000 also makes a proposal of penalty that taxpayers need to fully understand and
2. The CP2000 works like an audit in terms of deficiency, taxpayers need to be made aware of their Right to Appeal

Selden motioned; Buttonow seconded.

Action: Issue elevated, as amended, to IRS for consideration.

Special Projects

Williams reported still working issues 41565 and 41566. IRS declined due to budget issues. Issues 42213 and 42219 have been combined. Issue 41525 was tabled to later this year. Williams was published again, and the article may be in next newsletter.

Selden will share a report from the Congressional Budget Office which states that funding the IRS an additional 40 billion will bring in an additional 103 billion in revenue. This can be a good response when funding issues are raised by the IRS

Toll-Free Phone Lines

Price reported issue 40558 PSA requested toll free phone lines rejected, reconsidered and rejected a second time.

Issue 41423 tax practitioner phone line allowing support staff to give correct answers. The Taxpayer First office thinks this is important.



42231 Taxpayer should be able to leave callback information. IRS feels it's important.
43094 Redrafting 1040-line prompt structure, this is an Most Serious Problem of the NTA.

Taxpayer Communications

Buttonow thanked everyone for promoting Free File program. There was a 28 percent increase from last year. We should follow-up on this issue next year. They are working on how to get more referrals to www.improveirs.org with IRS.

The IRS is rectifying many of the issues they are giving us in real time by adopting our recommendations. They are working "Where's My Refund" for prior years. We are working on tax lien payoff access in real time for tax lawyers to stream-line this process. They are currently working on two issues:

Online accounts for taxpayers/professionals
Inability to get ahold of IRS

Accelerated online accounts would be in line with a taxpayer focused approach for the IRS and will be our focus moving forward.

Taxpayer Assistance Center Improvements

Tross reported looking at innocent spouse versus injured spouse and how people access finding a TAC office. Kleiber said the Treasury Secretary stated there will be another stimulus package, so we should be anticipating there being additional issues soon.

Internal Communications Committee

Brock speaking on Annual Report and social media will be the focus of next meeting. Brock also indicated that the newsletter articles can be any kind that members feel is appropriate.

Round Table

Selden corrected some things he said during the Taxpayer First Act call regarding TAP working with them. They have a 10-year focus with their mandates. Buttonow discussed their comprehensive customer service strategy. Buttonow is also interested in what their focus will be on cybersecurity and enforcement. Because this is such high-level, our comments should be as a committee instead of as individuals for a larger impact.

Moretti pointed out they view international tax problems as an underserved area. This are being considered immediately. Price pointed out that wait time transparency was important, along with expanding the automatic callbacks. Martinez invites members to review the template on Annual Report Chair reports and make changes they think are needed. Martinez cited the newsletter reports as a source that can be used for the committee annual reports.

Closing

English thanked everyone for their efforts on the call and closed the meeting. Thanked all members who attended the Taxpayer First Act meeting also.

Next Joint Committee Meeting is August 27, 2020 at 1:30 p.m. ET



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