

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
June 25, 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
- Phillip “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
- Cheryl Williams Chair, Special Projects Committee

Members Absent

- Nina Tross Chair, Taxpayer Assistant Centers Committee (TAC)

Visiting Members

- Donna Burris Member, Toll Free Phone Lines Committee
- Martha Lewis Member, Tax Forms and Publications Committee
- Michael Avery Member, Special Projects Committee

Staff

- Lisa Billups Program Analyst
- Kevin Brown Management Assistant
- Conchata Holloway Program Analyst
- Cedric Jeans TAP East Chief
- Susan Jimerson TAP West Chief
- Antonia 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
- Sheila Andrews Deputy Executive Director, Communications, Stakeholder Liaison and Online Services (CSO)
- Debra Awalt Program Analyst Wage and Investment (W&I)
- Tamikio Bohler Program Analyst W&I
- Cynthia “Cindy” Jones Manager W&I
- Michael Odom Program Analyst
- Alton Berger Supervisor, Public Affairs W&I
- Sheila Balkaran Program Analyst W&I

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:

- Taxpayer First act wants TAP chair and vice chairs for a survey.
- Tax forums will be done virtually this year, more information will be relayed later.

TAP Managers Update

Jimerson reminded the committee articles for the newsletter articles due today. Jimerson thanked Antonia Keeling for assisting with this project.

Approval of May 28, 2020 JC Meeting Minutes

1. Committee name corrected to Toll Free phone lines-title.
2. "...who may not be" removed from first sentence of Taxpayer Communications report.
3. Next meeting date corrected to June 25, 2020.

Price motioned; Williams seconded.

Action: Minutes are approved as corrected.

TAP Chair Report

Kleiber reported things picking up and momentum is being made with each of the committees getting much better than they were at the start of the TAP year. Kleiber encouraged members to complete survey and ask your committee to complete it. The National Taxpayer Advocate (NTA), Erin Collins, shared lots of information during the All TAP virtual meeting. Jim Buttonow gave a simple way to put the word out about Free Filing during the ICC meeting.

TAP Vice Chair Report

Moretti reported the activity reports are due today. There was an update received on website review project and the ICC members are helping with this project. There are Interviews in process for the 2021 year. All 23 files in the Outreach Toolkit have been reviewed and Media Contact guide is the most important. This has not been updated since 2008. Howard Brooks, our media contact source is helping with this process.

Public Comments

None

Project Committee Review/Activities

Tax Forms and Publications

41750 2210-F To assist farmers with reporting the correct amounts of under payments and penalties in terms of estimated taxes. This would give farmers and fisherman new option to file the form without waiver or change filing status on this form. Selden motioned; Funair seconded

Action: Issue elevated to IRS for consideration

41996 Printable IRS Forms 1099 and 1096. This referral wants to make form scannable and fillable. There should be language stipulating that although Forms W-2, W-3 go to the Social Security Administration the referral still would like all these forms to be made printable. Martinez made the wording update. The name of this referral was also changed to Printable Reporting Forms. Selden motioned, Funair seconded.

Action: referral approved as amended to elevate to the IRS for consideration

42823 1099-R Review

The referral would require the reporting entity to report qualified charitable distribution on the form. The referral also requests a fillable for of Copy A, consolidating a list of codes to one page and increasing the font size on the form. Selden motioned; Price seconded.

Action: Issue elevated to IRS for consideration

42824 Pub. 15-T - Federal Income Tax Withholding Methods

The referral proposes to streamline language, clarify the requirements for withholding, define the exemption, eliminate the need for annual changes to this form, to clarify the use for nonresident alien. Selden motioned; Brock seconded.

Action: Issue elevated to IRS for consideration

42825 Review of 2019 Form 1040 Schedule 1 and Instructions

42826 Review of 2019 Form 1040 Schedule 2 and Instructions

42827 Review of 2019 Form 1040 Schedule 3 and Instructions

These three referrals are all asking to increase font size to improve readability; be reformatted to create consistent format, include specialty items to be able to be cross-referenced.

Selden motioned; Williams seconded.

Action: All three Referrals elevated to IRS for consideration for consideration.

Selden reported the committee responded to the IRS in draft form for one matter that will be discussed soon.

Notices and Correspondence

Referral Issues 42225, 42226, 42413, 42425

Bunner reported submitting drafts to the IRS for these referrals due to time constraints. The referrals were directly related to formatting, clarification and understanding.

42413- LT 17

The referral is to provide clarification and comments regarding Employer Identification Number (EIN) and SSNs. The EIN should be separate, and the Taxpayer Identification number (TIN)/SSN should be together on the form.

42225- CP14

42226- Collection Letter LT16

42425- LT 19

These referrals were for formatting, clarification and understanding and are being voting on as a group. Selden motioned; Brock seconded.

Action: All referrals elevated to IRS for consideration.

Bunner reported that the CP 2000 may be ready for next meeting.

Internal Communications Committee

Brock reminded the committee the article for the newsletter can be as much as three-quarters of a page or 2500 characters, which is not very long. Brock also spoke about the ICC promoting Free File through social media outlets.

Referral Issue 43192- TAPSpace/Improveirs.org Website Re-Design

This referral is making the website more user-friendly and accessible to the public to include taxpayers with disabilities. This project is important as it address one of the Taxpayer Bill of Rights (TBOR), Right to Quality Service. Brock motioned; Price seconded

Action: Referral elevated to CSO for consideration.

Special Projects

41296- Quick Withdrawal of POA's. Electronic version of withdrawal of Power of Attorney (POA) to make this process faster and easier. Williams motioned; Funair seconded.

Action: Referral elevated to IRS for consideration.

Williams reported COVID-19 has brought several complaints and issues. Four of them are from the International subcommittee and seven for the ID Theft subcommittee.

Toll-Free Phone Lines

Price reported two members resigned. Price also welcomed Donna Burris as the newest committee member who jumped right in to contribute. One subcommittee is working on the IRS Prisoner Reentry Program to help taxpayers returning to society along with an issue with www.irs.gov and an issue allowing service representative to answer complex tax questions.

Subcommittee two is working on several issue about 1040 phone lines and we hope to bring issues up soon. The committee referred on issue to the to the Special Projects committee concerning international phone lines.

Taxpayer Communications

Funair applauded Jim Buttonow for sharing how to share Free File information via social media like LinkedIn and Facebook. Funair suggested reminding taxpayers that they should file their taxes by July 15, 2020.

Taxpayer Assistance Center Improvements

O'Sullivan reported a lot of issues concerning stimulus checks and COVID-19. There have been quite a few issues and possible cases regarding innocent spouse and transcript issues. Often the secondary person on the tax return is calling for innocent spouse or transcript requests. This issue is being reviewed to make is easier for taxpayers to deal with these issues. Both issues are in the process of being worked.

Round Table

Survey ends tonight please take, Jeans. Kleiber wants input from panel members regarding the next All TAP meeting.

Closing

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

Next Joint Committee Meeting is July 23, 2020 at 1:30 p.m. ET

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