

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
October 22, 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)
- 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
- Thurston Smith Vice-Chair, Taxpayer Assistant Centers Committee (TAC)
- Nina Tross Chair, Taxpayer Assistant Centers Committee (Absent)
- Cheryl Williams Chair, Special Projects Committee

Visiting Members

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

Staff

- Lisa Billups Program Analyst
- Kevin Brown Management Assistant
- Conchata Holloway Program Analyst
- Cedric Jeans TAP East Chief
- Susan Jimerson TAP West Chief
- Gilbert Martinez Program Analyst
- Rosalind Matherne Program Analyst
- Matthew O’Sullivan Program Analyst
- Antoinette “Toni” Ross Program Analyst
- Fred Smith Program Analyst
- Debra Awalt Program Analyst Wage and Investment (W&I)
- Michael Odom Program Analyst W&I

Members of The Public

None

Roll Call

Quorum was met for the meeting.

Welcome, Review Agenda

English welcomed everyone and opened the call at 1:30pm ET. Kleiber reviewed the agenda.

DFO/National Office Update

English reminded members to review www.irs.gov regularly because the IRS periodically updates it with new information. English also spoke about payments sent into the IRS and how it may be delayed with the pandemic and the delays with mail. English spoke about the possibility of penalties being assessed if taxpayers file late. There is also guidance about businesses that are closing and how collecting unemployment could affect a person's taxes.

English and Awalt reported that the IRS is currently catching up with the mail that is being processed. Awalt continued that some mail is still backlogged right now.

TAP Managers Update

Jimerson reported the first mentorship program meeting and how affective it was. Martha Lewis is the lead for this project. Jimerson told the committee that the solicitation for the first and second year members to select their project committees by October 30, 2020.

Jeans reported losing Alexas Pickron from Delaware and we will recruit from there again.

Approval of September 24, 2020 JC Meeting Minutes

After minor typos, cosmetic corrections and spelling errors corrected the minutes were accepted. Williams motioned; Price seconded.

Action: Minutes approved as amended.

TAP Chair Report

Kleiber reported everyone submitted their initial annual reports on time. Kleiber praised Matherne for leading the mentorship program call and said this will really improve the program and the onboarding process for next year.

TAP Vice Chair Report

Moretti spoke about suggestions for the slides and checklist for the mentoring program to be submitted to Martha Lewis. Moretti spoke about possibly using of Zoom. Moretti said we added an Overseas taxpayer folder to the Outreach Toolkit, please send any suggestions for this folder. Moretti reminded the committee of all the useful tools and information available on www.tapspace.org and how we should be sharing with taxpayers such as the COVID-19 Business tax relief toolkit, the deferred payroll tax obligations, and Economic Impact Payment for taxpayers experiencing homelessness by November 21, 2020. Moretti spoke of sharing this information with homeless shelters.

Public Comments

None

Project Committee Review/Activities

Special Projects

Issue 42967 Simplified Reporting for Overseas Taxpayers

The purpose of this referral is to simplify the filing requirements for many overseas taxpayers. This complies with Taxpayer Bill Of Rights (TBOR), The Right to Be Informed and The Right to a Fair and Just Tax System. Williams motion Brock seconded

Action Issue elevated to IRS for consideration

Issue 42978 Unfair Filing and Tax Costs for Non-Resident Citizens. The goal of this referral is to assure that overseas taxpayers have access to competent and affordably priced assistance in completing their US tax forms. Williams motioned; Brock seconded.

Action: Issue elevated to IRS for consideration

Issue 42996 IRS Not Respecting Mandatory Use of Registered Mail. This referral seeks to send mail certified to US territories and registered mail to all others for speed and tracking purposes. The TBOR- The Right to Be Informed; The Right to Quality Service; The Right to Challenge the IRS's Position and Be Heard; and the Right to a Fair and Just Tax System. Williams motioned; Selden seconded.

Action: Issue elevated to IRS for consideration

Issue 43054 IRS Accounts Made Dysfunctional for Non-Resident Americans. This referral seeks to make it as easy for non-resident taxpayers to access online accounts as domestic taxpayers. The TBOR rights affected are: The Right to a Fair and Just Tax System, The right to Be Informed; The Right to Quality Service and The Right to Privacy Williams motioned; Brock seconded.

Action: Issue elevated to IRS for consideration

Williams thanked the entire committee for doing a fantastic job on these referrals.

Toll-Free Lines

Issues 41899 IRS Navigation Guide and IRS Telephone Numbers Link. This referral is asking for the addition of a navigation guide to the IRS website. There is also a request to place the 800-829-1040 number be place as a footer on www.irs.gov. Price motioned; Smith seconded.

Action: Issue elevated to IRS for consideration

43632 Reposition Foreign Language Prompts on 1040 toll free line.
Price motioned; Bunner seconded.

Action: Issue elevated to IRS for consideration

Tax Forms and Publications

Referral Issue 43731 Form 1310 – Statement of Person Claiming Refund Due a Deceased Taxpayer. This referral is to add language and more specificity to help taxpayers fill this form out. Selden motioned; Williams seconded.

Action: Issue elevated to IRS for consideration

Taxpayer Assistance Center Improvements

Issue 40310 Title of the Project: Suggestion for Getting Transcripts. Smith reported it was recommended that this issue be made into two issues because the recommendations appeared unrelated. O'Sullivan explained their relation was allowing online ability to request these actions within a TAC so this referral will remain as submitted. Smith motioned; Brock seconded.

Action: Issue elevated to IRS for consideration

Internal Communications Committee

Brock reported newsletter came out and thanked members who helped put it together. Brock and O'Sullivan reminded the committee to turn in their reports for the next newsletter.

Notices and Correspondence

Bunner reported the committee is awaiting response for the referral for letter 3219C. This should be ready for the next JC meeting along with possibly two mor referrals.

Taxpayer Communications

Holloway reported the committee is working on issue 40613 which is still being worked. The committee is also working on a better way to communicate with the IRS online.

Round Table

N/A

Closing

English thanked everyone for a good meeting. English closed the call at 2:36 ET closed.

Next Joint Committee Meeting is November 19, 2020 at 1:30pm ET

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