

**Joint Committee (JC)  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
September 24, 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
- Nina Tross Chair, Taxpayer Assistant Centers Committee (TAC)
- Cheryl Williams Chair, Special Projects Committee

**Visiting Members**

- Michael Avery Member, Special Projects Committee
- Donna Burris Member, Toll-Free Phone Lines Committee
- Dorothy Havey Member, Special Projects Committee
- Martha Lewis Member, Tax Forms and Publications Committee
- Thurston Smith Vice-Chair, Taxpayer Assistant Centers Committee

**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
- 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**

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

## **DFO/National Office Update**

English reported the National Taxpayer Advocate (NTA), Erin Collins, wrote a blog and highlighted National Small Business week. The NTA referenced how small businesses account for about 99 percent of US business and employ about 60 million people, all of which have affected by this pandemic. Included in the blog were links for assistance to small businesses who need help. This blog has been placed on the Taxpayer Advocate Service (TAS) website.

English spoke about the deferral of Social Security withdrawals starting on September 18, 2020 for taxpayers making 4,000 or less per pay period. The repayment process will be from January 2021 to April 2021. This is also on the TAS website.

Burris asked why there is no separation of the smallest of the small businesses who have 20 employees or less, compared to businesses of 500 or less employees. English said Systemic Advocacy is working on this right now.

## **TAP Managers Update**

Jimerson reported the TAP West committees are working on finalizing referrals by the end of the year. The ICC got a progress report of the [www.tapspace.org](http://www.tapspace.org) and [www.improveirs.org](http://www.improveirs.org) redesign.

Jeans inquired if anyone on the call had received their business cards or badges yet since they were recently sent out. No one on the call have. Systemic Advocacy (SA) asked how the pandemic was affecting TAP, Jeans responded that it is affecting out outreach mainly. Jeans also said that our virtual campaign is working well this year.

## **Approval of August Face to Face; August 27, 2020 JC Meeting Minutes**

August 25-26, 2020, Face to Face Minutes. Kleiber motioned; Selden seconded.

August 27, 2020 minutes. Kleiber motioned Williams

**Action: Both sets of minutes approved as submitted.**

## **TAP Chair Report**

Kleiber reported Beta version for the new TAP website will be available this fall for testing. The interactive taxpayer roadmap will be available this fall. The roadmap can be used as outreach tool. Kleiber encouraged the committee to think about referrals to promote the use of this tool.

Zoom has been approved for use by IRS, there is potential for us to maybe use this. An onboarding committee for new members is being established for new members for next year. Kleiber reported that the Annual Report template has been sent out to committee Chairs.

## **TAP Vice Chair Report**

Moretti reminded the committee they can continue outreach during the “down month” for TAP. The Social Security tax deferment is a likely topic for outreach. This story is on [www.tapspace.org](http://www.tapspace.org). We have created a TAP checklist and any member can review this document for improvements. This could become modules on the new TAP website when it comes online. Price thinks this can be part of the onboarding committee.

## **Public Comments**

None

## **Project Committee Review/Activities**

### **Notices and Correspondence**

#### **39747** ITIN Rejection Notice CP567

This referral seeks clarify to make the form easier to complete. Bunner motioned; Brock seconded.

**Action:** Issue elevate to IRS for consideration.

#### **43347** CP2000 Notice and Paragraph Language

The recommendation seeks to clarify that this notice is a proposed change and give taxpayers all their options before they respond or just pay the notice amount. There were numerous changes to simplify and make the notice clearer for taxpayers to understand. Bunner motioned; Tross seconded.

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

#### **43573** Letter 3219C Notice of Deficiency

The first recommendation is to change the format for better flow, the next is to define the actual deficiency for the taxpayer. There is a recommendation to link a specific web address as a time saving measure for taxpayers. Lastly, there are some grammatical corrections. Bunner motioned; Funair seconded.

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

## **Taxpayer Communications**

**40148** Multiple Year Display For “Where’s My Refund” Tool. The recommendations are to add the prior year information to this tool and to review this again when the online accounts are available to taxpayers. Funair motioned; Tross seconded.

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

#### **40485** IRS Tax Calendar

The recommendation is for the system to provide the due dates and extension dates for all entities in the calendar. Funair motioned; Tross seconded.

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

#### **41883** Official, Tax Lien Payoff

The recommendation is for an official payoff calendar with amount and payoff ready and available for taxpayers. The second recommendation is to have the official payoff calculator document. Funair motioned; Williams seconded.

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

### **Toll-Free Lines**

**43095** “Go Back” Options. The recommendation is to add a go back option to main menu or previous member to the 1040 phone lines. Price motioned; Williams seconded.

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

### **43463** Area Code Added to Voice Response Unit

The recommendation is the system communicate the normal business hours based on the area code called. The next is to have the normal business hours on www.irs.gov for individuals, businesses and nonprofits available for taxpayers. Price motioned; Brock seconded.

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

### **Special Projects**

**41749** Delays in delivery of correspondence to overseas taxpayers.

The recommendation is to mail the notices differently or to change the deadlines for non-statutory notices to 120 days. The delays in delivery and the unrealistic deadlines are a violation of six of the Taxpayer Bill of Rights (TBOR): The Right to Be Informed; The Right to Quality Service; The Right to Pay No More Than The Correct Amount of Tax; The Right to Challenge IRS’s Position and Be Heard; The Right to Finality; and The Right to a Fair and Just Tax System. The committee will consider this issue for domestically residing citizens in the future.

Williams motioned; Tross seconded.

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

### **Tax Forms and Publications**

**42161** Estimated Tax Worksheet

The recommendation is to add worksheets to this form to make it easier for taxpayers to complete the Form 1040-ES instead of being delayed waiting on the Publication 505.

Selden motioned; Bunner seconded.

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

### **Taxpayer Assistance Center Improvements**

Tross said they have no referrals for this month, but they may have two for next month.

### **Internal Communications Committee**

Brock reported including some of the website updates into the newsletter. The committee is also working with the Outreach committee on checklist.

### **Round Table**

Awalt will check on the IRS processing of mail and respond back to English.

### **Closing**

English thanked everyone for all the tremendous work as it will make a difference to taxpayers going forward. English closed the call at 2:56 ET closed.

**Next Joint Committee Meeting is October 22, 2020 at 1:30pm ET**

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