

## **2012 Meeting Minutes Joint Committee**

- November 28, 2012
  - October 24, 2012
  - September 26, 2012
  - August 22, 2012
  - July 19 – 20, 2012
  - June 27, 2012
  - May 23, 2012
  - April 25, 2012
  - March 28, 2012
  - February 22, 2012
- 

### **Taxpayer Advocacy Panel (TAP) Joint Committee Teleconference Meeting Minutes November 28, 2012**

#### **Designated Federal Official**

- Tiffany Todaro                      Acting TAP Director

#### **Members Present**

- |                     |                                    |
|---------------------|------------------------------------|
| • Eboni Moss        | TAP Chair                          |
| • Jackie Rollins    | TAP Vice Chair                     |
| • PK Purkayastha    | Chair, Refund Processing           |
| • Richard Bilancia  | Chair, SB/SE Decreasing Non-Filers |
| • Robert Hayden     | Chair, Tax Forms & Pubs            |
| • Seth Flanders     | Chair, Taxpayer Burden Reduction   |
| • Colleen Hitchcock | Chair, Toll Free                   |
| • Boris Mikhail     | Chair, Screening Committee         |
| • Mark Bernstein    | Chair, Return Processing           |
| • David Cain        | Chair, Face-to-Face                |
| • Mark Marshalek    | Chair, Communication Committee     |

#### **Members Absent**

- Ken Donnelly                      Chair, Bankruptcy Compliance

#### **Guests:**

- |                        |   |
|------------------------|---|
| • Lois Lombardo        | Acting Executive Director Systemic Advocacy |
| • Karie Davis Nozemack | TAP Member                                  |
| • Basha McCrumb        | TAP Member                                  |
| • Doug Christopher     | TAP Member                                  |



- Rodger Lees TAP Member

### **Staff Present**

- |                      |                        |
|----------------------|------------------------|
| • Louis Morizio      | TAP East Manager       |
| • Susan Jimerson     | TAP West Manager       |
| • Steve Berkey       | Senior Program Analyst |
| • Linda Rivera       | Senior Program Analyst |
| • Susan Gilbert      | Senior Program Analyst |
| • Russ Pool          | Database Analyst       |
| • Nina Pang          | Program Analyst        |
| • Donna Powers       | Program Analyst        |
| • Marianne Dominquez | Program Analyst        |
| • Ellen Smiley       | Program Analyst        |
| • Patti Robb         | Program Analyst        |
| • Marisa Knispel     | Program Analyst        |
| • Meredith Odom      | Program Analyst        |
| • Kymberly Maine     | Management Assistant   |

### **Members of the Public**

None

### **Welcome/Announcements/Review Agenda**

Eboni welcomed everyone to the call. She reviewed the agenda and hoped everyone had a chance to review the pre-reads.

### **Review and Approval Minutes**

The committee came to a consensus to approve the October minutes after Jackie commented on the area of the minutes regarding referral #24308, stating she had a few corrections that she felt would make it sound better. Susan Gilbert captured the corrections and will make the corrections.

### **National Office Report**

Tiffany welcomed everyone to the call. She thanked all the retiring members and the Joint Committee for their dedication and continuous effort to making TAP better. She listed all of the retirees from the 2012 TAP year and noted she appreciated their support to the staff through the year. She personally thanked Eboni and Jackie for all of their hard work this year, especially Eboni with her leadership style and Jackie with her efforts on Outreach.

She mentioned she had made it to all of the final calls for all the project committees and she had received a lot of concern from the members with the way the TAP had been this year and concern regarding the cancellation of last year's Annual meeting had started the entire year on a bad note. She assured the JC that this year's meeting would not be cancelled.



She provided a brief breakdown of the Annual Meeting/Training and how the Program Owners would be attending to provide the members the projects and more information to get started with. She also mentioned the training will be beneficial for both current and new members. She hopes that all members find the meeting very productive and helpful to get the year started.

She also mentioned that all retirees would receive a Presidential Volunteerism Award that would be mailed to them at a later date, as well as a certificate of appreciation to both the TAP Chair and Vice Chair.

### **TAP Chair Report**

Eboni also thanked retirees, who were on the JC, especially Jackie's efforts on outreach. She also thanked the staff for their continued support to the TAP members. She provided a special thank you to the Plantation, FL office because of their efforts with her during her first two years within the TAP.

### **Project Committee Review**

#### **Return Processing Delays Project #25823 – Mark-up Age 65+ Standard Deduction Referral – Karie Davis-Nozemack**

Karie provided a brief background on the project referral, stating taxpayers 65 or above are eligible for an additional standard deduction, by either checking a box or calculating the amount and she stated the key taxpayers being affected are the ones filing via paper. These taxpayers need the additional deduction to provide for a better life for them. The group's suggestion is to have the IRS add an additional step to check the age of the taxpayers filing a paper return.

The panel discussed the referral and provided a few minor corrections to the committee, which were corrected as the group discussed the referral form.

The Joint Committee, by consensus, decided to approve the project referral after the minor corrections were completed.

#### **Toll-Free Project #23751 – Menu Options – Colleen Hitchcock**

Colleen provided a brief description of the project referral, explaining how the toll free project committee had several issues to review and decide if it was something that should be focused on. She mentioned the committee focused on the phone menu options because that was where most of the issues were focused. She said the referral targeted specifically on the 1040 hotline, not any other hotline.

The panel discussed the referral asking a few questions, which were answered by Colleen. Steve Berkey suggested adding a footnote to reflect where the information TAP had received was from.

The Joint Committee, by consensus, decided to approve the project referral with minor corrections added.

Russ announced there are two project referrals for Tax Forms and Pubs that are in the pipeline and are in Quality Review. He said they should be ready for the next Joint Committee meeting.

### **Recruitment**

Steve reported there were 26 new members who joined the 2013 TAP. He said 12 are through this year's recruiting period and the 14 others are from the alternate pools. He said the process took longer than expected, but the staff had plans to trying to move up the recruiting process to better assist getting the members selected in a timely manner.

### **Draft TAP By-Laws**

Steve stated the by-laws were something that TIGTA suggested when TAP went through a TIGTA audit. He said the by-laws originally were started through the internal communications committee and was approved, but with the current changes had been edited prior to final Joint Committee approval.

The group discussed the by-laws, stating their concerns with the amount of items that currently govern TAP, with the lack of current TAP member participation through the process of developing and how the group didn't feel comfortable approving something that could affect the 2013 TAP members and Joint Committee.

The group decided, by consensus, to not approve the by-laws and to hold it till the next JC meeting dated December 13, 2012. The hope was that by the second JC meeting all TAP members would have reviewed the by-laws and would be willing to approve them.

**Action Item:** Seth Flanders, Mark Marshalek, Rich Bilancia, PK Purkayastha and Steve Berkey will review and provide corrections to the by-laws prior to members seeing them and then send them out to the members.

**Action Item:** Staff to discuss with IRS liaisons to provide further guidance on the IRS procedures for interaction between TAP and IRS during an AdHoc committee.

**Action Item:** Steve mentioned that prior to the December 13 JC meeting, the internal Communications needed to elect their chair, because the internal communications would not meet in person. He said the group would have representations from every committee and would have to elect via email for their chair.

### **Annual Training**

Susan Gilbert said topic was covered in National Office Report by Tiffany Todaro.



### **Closing Codes**

The committee decided to postpone till next JC meeting.

### **TAP Project Committee Report**

Mark Marshalek asked if everyone had reviewed the instructions and template for the annual report that were sent as pre-reads. He requested each chair begin working on the template and his hope was to have at least the draft done by the end of December. The internal communications could start working on the Annual Report in January. Mark stated to focus on the key facts that the project committee did.

Steve provided a little background on where the template was developed from, stating in the 2011 Annual Report several of the items were from the chair reports in 2011. Steve mentioned the goal was to get the work done quickly so the Annual Report done sooner than normally complete.

### **Update: Internal Communications**

Mark mentioned he wanted to do the newsletter and asked that chairs email him so he can go to TAPSpace and review their monthly minutes. He also asked how the JC felt about the newsletter, if it was helpful or should it go away. The consensus was keep going with it and Mark said to suggest sections if they were needed.

Jackie mentioned her efforts to get more members involved with Outreach and said that she did her best. She hoped that the staff and TAP chairs would encourage better outreach from the TAP members. She also mentioned her own effort in getting a public service message through a video ad as an outreach tool that can be used in a variety of ways other than shown on a movie screen for which it was originally intended.

### **Public Comments**

None

### **Closing**

The meeting is closed.

**Next Meeting: December 13, 2012 at 2 p.m. ET**



**Taxpayer Advocacy Panel (TAP)  
Joint Committee  
Teleconference Meeting Minutes  
October 24, 2012**

**Designated Federal Official**

- Louis Morizio                      Acting TAP Director

**Members Present**

- Eboni Moss                      TAP Chair
- Jackie Rollins                  TAP Vice Chair
- PK Purkayastha                Chair, Refund Processing
- Richard Bilancia              Chair, SB/SE Decreasing Non-Filers
- Robert Hayden                Chair, Tax Forms & Pubs
- Seth Flanders                  Chair, Taxpayer Burden Reduction
- Colleen Hitchcock             Chair, Toll Free
- Boris Mikhail                   Chair, Screening Committee
- Mark Bernstein                Chair, Return Processing
- Ken Donnelly                   Chair, Bankruptcy Compliance
- David Cain                      Chair, Face-to-Face

**Members Absent**

- Mark Marshalek                Chair, Communication Committee

**Guests**

- Toni Smith                      Panel Member from Omaha, NE

**Staff Present**

- Louis Morizio                  TAP East Manager
- Susan Jimerson                TAP West Manager
- Steve Berkey                  Senior Program Analyst
- Linda Rivera                  Senior Program Analyst
- Susan Gilbert                 Senior Program Analyst
- Russ Pool                      Database Analyst
- Nina Pang                      Program Analyst
- Donna Powers                 Program Analyst
- Ellen Smiley                  Program Analyst
- Patti Robb                      Program Analyst
- Marisa Knispel                Program Analyst
- Meredith Odom                Program Analyst
- Kevin Brown                  Management Assistant

**Members of the Public**

None



## **Welcome/Announcements/Review Agenda**

### **Review and Approval Minutes**

The committee came to a consensus to approve the September minutes with some minor changes.

### **National Office Report**

Linda Rivera reported that the Recruitment package was just completed and sent to the Commissioner to be elevated to the Department of Treasury.

### **TAP Chair Report**

### **Project Committee Review**

#### **Face-to-Face Service Methods – Project # 23237**

Alternatives or Improvements to Taxpayer Assistance Centers for taxpayers 50 or more miles away:

- Facilitated self-service kiosk providing answers to many tax questions to include employee contact information.
- Payment Kiosks to speed the payment process for taxpayers only making payments.
- Mobile vans providing tax related assistance for areas farther away from the Taxpayer Assistance Centers.
- Expanded email service to provide additional options for tax related questions.
- An appointment scheduling system to prevent multiple trips to the centers and extremely long waits for taxpayers.

Formatting issues were discussed about the document received by the panel members to ensure that the document is accurate, grammatically correct and professional in appearance.

**Action Item:** Once these corrections have been made, there is consensus to move this project forward.

#### **Taxpayer Burden Reduction – Project # 25636**

IRS E-File Free File Review and Recommendations. Seth Flanders reported:

- Make the warnings more obvious that you are going to a third-party vendor while using E-file.
- Making the error codes much more obvious and less cryptic.
- Let taxpayers know that they can have multiple copies of fillable forms.



David Cain responded that there is never going to be a program that allows non-practitioners an error proof system so we would need to be sure that this recommendation is going to add value to the E-file system.

**Action Item:** The committee has consensus to move this project forward.

### **Tax Forms and Pubs**

#### **Review Pub 596 w/ attachment – Project #24943**

596SP was reviewed and there are 2 main dialects; one is geared toward Puerto Rican Spanish and the other is geared more toward Western Spanish. Version 2 was recommended as it appeared more “Spanish Friendly” and thus more effective for all. The word “publications” and “publicacion” came up as being interchangeable, but the term “publicacion” will be used.

**Action Item:** The committee has consensus to move this project forward.

#### **Forms & Pubs Availability – Project #24038**

Jackie Rollins commented on the post card review. The issue write up should read date approved by project committee instead of joint committee. After ordering multiple forms and publications, online and on the phone the system does not make it clear or apparent that forms ordered may not be available. Secondly, the system seems a bit flawed as once the order is complete some of the requested items that are not in stock come before the items that are in stock. A proposed solution is to list the titles of the unavailable products on the post cards, allowing downloads or other alternatives for the taxpayers.

**Action Item:** This project has consensus to move forward by the committee.

### **Election Results**

Steve Berkey reported that Richard Bilancia will be Chair and Colleen Hitchcock will be Vice Chair for the 2013 year. Only 48 of 74 eligible members cast ballots in the election. This is a participation rate of 65%. We need to increase participation to improve this process.

### **Annual Training**

Louis Morizio reported that the training will occur on Wednesday December 5, 2012, simultaneously in 3 locations. We have the draft agenda and the PowerPoint presentation for the process flow presentation. The EDSA made some suggestions on the TAP Overview presentation that is currently being revised for the training. As soon as this is done a conference call will be set up with the presenters.

### **2012 Member Survey**

Member surveys are being presented and will be specific to the members' tenure category to include one for new members, returning members and retiring members. November 1 we will have a call to go over some of the



changes that Bilancia has suggested. Mark Bernstein, the chair of Return Processing, asked who will see the responses and what will be done with the information. The TAP staff will see the information, all anonymous, and it will be shared with the Joint Committee. This year will be a baseline for needed improvements. The purpose for this survey is to improve training, the mentor program and the TAP experience overall. The surveys for the retiring members will go out as soon as approval has been received. For the new and returning members it will have to be after the training in December.

#### **Update: Internal Committees (Communications & Outreach)**

Mark Marshalek, chair of Communications, will be working with Berkey on a draft of the September and October newsletter in the near future. Template for Chair report is still a pre-read and the members are able to put their suggestions together for the final report. The panel will need to focus on exactly what the committees have worked on and it needs to be expounded on by the report. The question, "What value did you add to the IRS?" should be answered in this report. The TAP staff will take care of the member and staff information. The initial draft will be due by the end of November. The deadline for the suggestion will be Wednesday October 31, 2012 and shortly afterwards the final version will be due. There will need to be a team assembled for the annual report to ensure it will be done effectively.

Jackie Rollins, chair of Outreach, reports that both she and Colleen Hitchcock are working on the training materials and the time recorded spreadsheet. It is still a work in progress, but they will continue to work on it.

Mark Bernstein, PK Purkayastha, chair of Refund Processing, and Ellen Smiley were interviewed by [www.about.com](http://www.about.com) about the delayed tax refunds, they will inform the panel when it gets published.

Hitchcock, the chair of Toll-Free, will be submitting a committee report at the next meeting.

Seth Flanders, chair of Taxpayer Burden Reduction, has several projects that are still in the works and will be presented in January if not resolved soon.

Robert Hayden, chair of Tax Forms & Pubs, are working on three things: 1040 instructions adding something to when you must file, how we track people making intermediate payments and Form 8949 attachment to schedule D.

PK Purkayastha, gave 21 suggestions to the IRS this year. The issue is that 12 were coded "resolved prior to elevation" being worked since early 2012, 6 were "under consideration," 2 partially accepted and 1 rejected. Purkayastha is concerned because the committee should have been made aware of the issues that they worked on were already being implemented by the IRS in parallel. Berkey responded that we are working with the IRS and its program owners to



improve communications and prevent issues like this in the future. This caused the TAP to follow a duplicate path that the IRS was on and we need to find a way to prevent this from happening moving forward. The status, "considered by IRS" or "project/task completed" could be another code that can be used. PK was asked to consult with his committee for comments and if they chose to, then submit additional closing does for consideration.

**Action Item:** These options along with other concerns will be continued on the next committee meeting.

**Public Participation**

None

**Closing**

Next Meeting: November 28, 2012 at 2 p.m. ET

**Taxpayer Advocacy Panel  
Joint Committee  
Teleconference Meeting Minutes  
September 26, 2012**

**Designated Federal Official**

- Tiffany Todaro                      Acting TAP Director

**Members Present**

- Eboni Moss                      TAP Chair
- Jackie Rollins                      TAP Vice Chair
- Robert Hayden                      Chair, Tax Forms & Pubs
- Seth Flanders                      Chair, Taxpayer Burden Reduction
- Colleen Hitchcock                      Chair, Toll Free
- Mark Bernstein                      Chair, Return Processing Delays
- Ken Donnelly                      Chair, Bankruptcy Compliance

**Members Absent**

- PK Purkayastha                      Chair, Refund Processing Communications
- David Cain                      Chair, Face-to-Face
- Mark Marshalek                      Chair, Communication Committee
- Richard Bilancia                      Chair, SB/SE Decreasing Non-Filers
- Boris Mikhail                      Chair, Screening Committee

**Staff Present**

- Steve Berkey                      Senior Program Analyst
- Linda Rivera                      Senior Program Analyst
- Susan Gilbert                      Senior Program Analyst
- Russ Pool                      Database Analyst
- Louis Morizio                      TAP East Manager
- Susan Jimerson                      TAP West Manager
- Nina Pang                      Program Analyst
- Tim Shepard                      Program Analyst
- Ellen Smiley                      Program Analyst
- Patti Robb                      Program Analyst
- Lisa Gabriel                      Program Analyst
- Donna Powers                      Program Analyst
- Marianne Dominguez                      Program Analyst
- Audrey Jenkins                      Program Analyst
- Kymberly Maine                      Management Assistant
- Kevin Brown                      Management Assistant

**Guests**

- Ben Tuchi                      TAP Member, SBSE Decreasing Non-Filers

- Doug Christopher TAP Member, Return Processing Delays
- Karie Davis-Nozemack Vice-Chair, Return Processing Delays
- Lisa Wongshue Vice-Chair, Return Processing Communications

### **Members of the Public**

None

### **Welcome/Announcements/Review Agenda**

Eboni welcomed everyone to the call

### **National Office Report**

Tiffany reported the Annual Training meeting that was held last week in Plantation, FL went very well and a lot of work was completed. She reviewed some of the topics that would be covered on Wednesday during the Annual Training week in December. She mentioned the three locations were Jacksonville, FL, Plantation, FL and Oakland, CA and they were pending approval for holding the meetings in those locations.

She reviewed the five project committees would be Communications, TAC, Notices and Correspondence, Tax Forms and Pubs and Toll Free. She said it appeared that Communications would be the project that would be split into two different dates because it could be the project that would have more than one project from SBSE.

She commended the Plantation, FL staff for their support during the training meeting and said it was good to meet everyone.

Tiffani said she didn't have anything else to report and said she was letting Steve take a few minutes to speak regarding the TAP Chair and Vice-Chair nominations and next steps in the election process.

Steve said he was pleased to announce that the election committee had received numerous nominations and he thanked all who had volunteered. He said the nominations for 2013 TAP Chair were Rich Bilancia and Seth Flanders and the nominations for 2013 TAP Vice Chair were Ken Armstrong, Bob Hayden, Colleen Hitchcock and Edward Skytes. He said the next step in the process was to hold a "Meet the Candidates" teleconference where all TAP members in attendance would be able to hear the candidates provide a brief statement as to why they would be a good chair or vice-chair as well as a statement that would be sent to all members. He said that call was set up and would be held on October 1 at 1 p.m. EST/12 p.m. CST/11 a.m. MST/10 a.m. PST.

**Action Item:** Steve to send out invitation to TAP members to attend the "Meet the Candidates" teleconference on October 1.

### **TAP Chair Report**

Eboni said she didn't have anything to report. However, she reminded all committee Chairs to wrap up all project referral forms as soon as possible in order to allow time for quality review and to get them on the October Joint Committee (JC) agenda for approval. She would like to have all referrals completed prior to November so the group could complete the year without any outstanding referrals pending.

### **Project Committee Review**

#### **Face-to-Face Service Methods**

None

#### **Taxpayer Burden Reduction**

None

### **Return Processing Delays – Karie Davis-Nozemack**

#### **Project Referral #24449 Adoption Credit Processing Recommendations**

Karie Davis-Nozemack spoke on the project committee's research and explained some of the issues they had found upon doing their research and how they developed their recommendations. She asked if there were any questions or other suggestions prior to the group deciding to send the referral up to the Internal Revenue Service (IRS) for their response and hopeful implementation.

The JC decided, by consensus, to approve the project referral #24449 Adoption Credit Processing Recommendations to be forwarded up to the IRS.

Several members commended the group's hard work and dedication to the project and the amount of research that went into their referral form and recommendations.

#### **Tax Forms & Pubs**

None

#### **Toll Free**

None

### **Bankruptcy Compliance – Ken Donnelly**

#### **Project Referral #23185 Bankruptcy Compliance Recommendations**

Ken Donnelly spoke on the project committee's research and explained some of the issues they had found upon doing their research and how they developed their recommendations, which was to get the new requirements for filing bankruptcy out to the taxpayers. He asked if there were any questions or other

suggestions prior to the group deciding to send the referral up to the IRS for their response and hopeful implementation.

There was a discussion and a few minor changes were made to the referral statement. Tim Shepard said he captured the changes and made them during the discussion.

The JC decided, by consensus, to approve the project referral #23185 Bankruptcy Compliance Recommendations to be forwarded up to the IRS.

Eboni commended the group for their hard work and dedication on getting the referral done.

Ken Donnelly stated his appreciation to the support his committee received from Tim Shepard and the Seattle office.

### **SBSE Decreasing Non-Filers – Ben Tuchi**

#### **Project Referral #23763 SB/SE Decreasing Non-Filers Recommendations**

Ben Tuchi spoke on the project committee's research and explained some of the issues they had found upon doing their research and how they developed their recommendations. He asked if there were any questions or other suggestions prior to the group deciding to send the referral up to the IRS for their response and hopeful implementation.

A discussion ensued and several changes were recommended prior to the referral being sent up to the IRS. Patti Robb mentioned she had captured the recommended changes for the referral form and was making the changes as the meeting progressed.

The JC decided to return the referral form to the project committee for the recommended changes to be made and then be emailed to the JC for review and to get an email consensus.

**Action Item:** Patti Robb to email the JC members the referral form by end of week for review and email consensus.

### **Refund Processing Communications**

None

### **Screening Procedure Changes – Louis Morizio**

Louis Morizio discussed the problems with the current process for the Screening Committee and stated the need for change. He explained the current process and described the difficulties with the process. Louis noted Jackie had mentioned the need for change on a leadership call. Louis then explained the new changes and described how the staff would be doing deeper research so that TAP members were getting the full picture of each new issue.

He explained the new process would require that each project committee would have individual screening teams, as few as three people, and each analyst associated with that project committee would do the research for each new issue. He said some issues would not fit in any of the 2013 Project Committees', however; those issues would be randomly given to one of the committees to research and decide what to do with.

He said the project committees could decide who would be part of their screening committees at the Face to Face meeting in December.

#### **Recruitment – Linda Rivera/Steve Berkey**

Linda stated the staff was waiting on the National Taxpayer Advocate (NTA) final approval review of the recommended new members. She also stated she had received the approval from Counsel on the new members and once she receives the NTA's final approval, she would prepare the package and forward it up to the Commissioner.

#### **Annual Training – Tiffany Todaro**

Tiffany stated she had already said all she had to say during the National Office report.

#### **Area/Project Committee Activities (if any)**

Eboni requested to know which committees had projects still in the works that could be on the next JC Agenda.

**Tax Forms and Pubs** – has two project referral forms in JC Quality Review

**Face to Face Service Methods** – has project referral form in Committee Quality Review

**Taxpayer Burden Reduction** – has project referral form in Committee Quality Review.

**Toll-Free** – currently drafting a project referral form

**Communications Committee** – Steve Berkey spoke, on behalf of Mark Marshalek, stating the Communication Committee had drafted a newsletter template. He said the draft would be emailed to the JC prior to be sending out to the full committee.

**Action Item:** Steve to email the newsletter template to Eboni and Jackie for final review, prior to sending it to the full committee.

**Outreach Committee** – Jackie Rollins mentioned that on last month's call, there were only three representatives from the project committees on the call. She asked that all Chairs ask their representatives to get someone else to stand in for them if they cannot be on the call. She said the next call would be



on Friday, September 28 and this would be the last meeting for the Outreach Committee.

**Screening Committee** – Louis Morizio stated there would be a screening call in both October and November.

**Public Participation**

None

**Closing**

Meeting adjourned.

Next Meeting: October 24, 2012 at 2 p.m. ET



**Taxpayer Advocacy Panel (TAP)  
Joint Committee  
Teleconference Meeting Minutes  
August 22, 2012**

**Designated Federal Official**

Tiffany Todaro                      Acting TAP Director

**Members Present**

Eboni Moss	TAP Chair
Jackie Rollins	TAP Vice Chair
PK Purkayastha	Chair, Refund Processing
Richard Bilancia	Chair, SB/SE Decreasing Non-Filers
Robert Hayden	Chair, Tax Forms & Pubs
Seth Flanders	Chair, Taxpayer Burden Reduction
Colleen Hitchcock	Chair, Toll Free
Boris Mikhail	Chair, Screening Committee
Mark Bernstein	Chair, Return Processing
Ken Donnelly	Chair, Bankruptcy Compliance.

**Members Absent**

David Cain	Chair, Face-to-Face
Mark Marshalek	Chair, Communication Committee

**Staff Present**

Louis Morizio	TAP East Manager
Susan Jimerson	TAP West Manager
Steve Berkey	Senior Program Analyst
Linda Rivera	Senior Program Analyst
Susan Gilbert	Senior Program Analyst
Russ Pool	Database Analyst
Nina Pang	Program Analyst
Tim Shepard	Program Analyst
Ellen Smiley	Program Analyst
Patti Robb	Program Analyst
Lisa Gabriel	Program Analyst
Marisa Knispel	Program Analyst
Meredith Odom	Program Analyst
Kevin A. Brown	Management Assistant

**Members of the Public**

None

**Welcome/Announcements/Review Agenda**

The minutes for the Face-to-Face meeting were approved. Eboni Moss indicated that Mark Marshalek is currently working on a News Letter and may have it done by the end of the week. Mark Bernstein inquired about having a



legend to explain the acronyms and titles for those who are not familiar with them and need a better understanding. Linda Rivera proposed a TAP organization chart in addition which she will work on for the TAP members.

### **National Office Report**

Tiffany Todaro indicated that her detail as Acting Director of TAP will end this week and Steve Berkey will assume the Acting Director position through Mid-November. There are plans for the position to be filled on a more permanent basis still in the works. The Virtual meeting has been proposed for December and January with consideration being given to everyone's schedules. Susan Gilbert spoke of workshops that would be beneficial for the new and returning members and the details of these workshops. FACA overview is something that will be focused on also. Some of the workshops may take place during the Face-to-Face meetings occurring at the beginning of the 2013 year. A hard copy of employee/member handbook was suggested and discussed for members. Todaro discussed how an overview of TAP and Systemic Advocacy would be beneficial for new and returning members. The classes consist of a 4 week period of classes lasting 1 ½ hours apiece for 4 days. The classes will be provided using the HSN system allowing the classes to be available twice a day. A portion of these classes could take place during the first 2 weeks of January. Virtual training will be from December into January and Face-to-Face will be the beginning of January.

Project committee proposals are needed by Friday, August 24, 2012.

### **TAP Chair Report**

Moss reported just as a follow up on comments and suggestions on the committee's project proposals and suggestions. With no additional changes Moss will finalize the proposals and send them forward by this coming Friday.

### **Project Committee Review**

None

### **Recruitment**

The package was sent last week to Rena for approval so we can put the official package together for the National Taxpayer Advocate for approval. There is only one biography needed from the new members. There are 24 returning members who have not returned their tax check waivers which is holding up the process at this time. That's an ongoing issue still left to be resolved.

### **Screening Committee Process Changes**

Boris Mikhail inquired about the status of the entire screening process and all the other on going issues? The conversation will need to be handled offline.



Robert Hayden spoke of parking lot issues and if there was a centralized location for them. Louis Morizio responded that the issues are in our database, which can be accessed by Russ Pool.

Berkey spoke about the details of the election procedures. The Chair and Vice Chair process is started by people being nominated or self-nominating for both position by September 10, 2012 and the election process to be conducted from October 1 through October 15, 2012. The successful candidates will be announced October 22, 2012 giving approximately 5 or 6 weeks to transition with Jackie Rollins and Moss. Third year members are allowed to vote. The procedures that Berkey sent out have been accepted and will apply to this year's process. In addition, based on Berkey being the new Acting Director, someone else will need to receive and count the votes for the election this year. Berkey recommended Otis Simpson for this task.

There will not be another Joint Committee Face-to-Face meeting this year.

#### **Face-to-Face Service Methods**

None

#### **Action Items**

- Linda Rivera will head the effort to create a TAP organization chart for the new and existing TAP members.
- The Virtual training and Face-to-Face meetings are still being organized.

#### **Public Participation**

None

#### **Closing**

Next Meeting: September 26, 2012 @ 2:00p.m. ET

**Taxpayer Advocacy Panel  
Joint Committee Face-to-Face  
Meeting Minutes  
July 19 – 20, 2012  
8:00 a.m. – 4:30 p.m.**

**Designated Federal Official**

- Tiffany Todaro                      Acting TAP Director

**Members Present**

- |                     |                                    |
|---------------------|------------------------------------|
| • Eboni Moss        | TAP Chair                          |
| • Jackie Rollins    | TAP Vice Chair                     |
| • David Cain        | Chair, Face-to-Face                |
| • Richard Bilancia  | Chair, SB/SE Decreasing Non-Filers |
| • Robert Hayden     | Chair, Tax Forms & Pubs            |
| • Seth Flanders     | Chair, Taxpayer Burden Reduction   |
| • Colleen Hitchcock | Chair, Toll Free                   |
| • Boris Mikhail     | Chair, Screening Committee         |
| • Mark Bernstein    | Chair, Return Processing           |
| • Mark Marshalek    | Chair, Communication Committee     |
| • Ken Donnelly      | Chair, Bankruptcy Compliance       |
| • Jack Dell         | Return Processing Communication    |

**Members Absent**

- PK Purkayastha                      Chair, Refund Processing

**Staff Present**

- |                  |                        |
|------------------|------------------------|
| • Louis Morizio  | TAP East Manager       |
| • Steve Berkey   | Senior Program Analyst |
| • Susan Gilbert  | Senior Program Analyst |
| • Susan Jimerson | TAP West Manager       |
| • Russ Pool      | Database Analyst       |
| • Rose A. Babb   | Management Assistant   |

**Members of the Public**

None

**Welcome/Announcements/Review Agenda**

Eboni Moss opened the meeting and welcomed everyone.

**Roll Call**

Rose Babb took roll call and quorum was met. Approval for July Joint Committee Meeting Minutes were approved by consensus.

### **National Office Report**

Todaro thanked the members for attending the Joint Committee's face-to-face meeting. Todaro also told the members that she appreciates their commitment to improve the IRS service to taxpayers.

### **TAP Chair Report**

Moss stated that there is nothing to report for this month, but mentioned that at the Seattle Face to Face meeting, she received feed back on back logged issues that were submitted by taxpayers. Moss asked members to be prepared to discuss how TAP can be improved.

### **Projects for Review**

The following Projects were reviewed and approved with some edits:

- **Project #19866** – Form 8379 Injured Spouse Allocation
- **Project #22409** – Inserting notice "Automatic Revocation of Tax-Exempt Status" in package 1023, Application for Recognition of Exemption.
- **Project #23667** – Improve Communications Regarding Refunds; bullet #9 will be eliminated.
- **Project #24559** -Make the Charities and Non-Profits Toll Free more accessible on the IRS Website.
- **Project #24530** – Form 8863, Education Credits and its instructions.
- **Project #24531** – Form W-4, Employee's Withholding.
- **Project #24532** – Form 4562, Depreciation and Amortization.
- **Project # 24533** – Schedule A, Itemized Deductions.
- **Project # 24534** – Publication 17, Your Federal Income Tax.

### **Screening Committee Category Results Report**

Rollins referenced the process of how area committees worked issues before the TAP realignment to project committees. She stated that there was an internal review screening process in place. Rollins suggested some ideas for change:

- Go to the project committees and have 3-4 screeners
- Let the project committee decide which issues are workable.
- Discuss the issues at the full committee conference call.
- Have a quality review in project committees done, and then send to the JC.

### **Project Committee Proposals for 2013**

Hayden stated that the TFP Parking lot is full. It was discussed that the Chair, Vice Chair and the Initial Review person will be the leads. Screening will be lead for that committee. Issues that come in will go directly to the screening sub committee group. If there are legislative issues, then those will go to full screening committee. If not, the screening committee will decide which project committee to assign the issues. If the project committee does not want to work the issues, then it goes back to the screening committee.

### **Virtual Training**

The members discussed their preferences of an Annual Meeting vs. a Face-to-Face meeting. There was a one-page handout given to members "Feedback on the Virtual Training. In addition to the feedback the following were mentioned:

- An Annual Meeting with break out sessions would be more productive rather than a Face-to-Face meeting.
- All committee meetings should be held in the same week in small groups.
- Have the first year members fully engaged on what they will do as it relates to their project committees.

Members discussed that all the Project Committees will try to conduct their F2F meetings as early in the year as possible, to incorporate the training into their meeting. It will thus be a 3-day meeting. Depending on how many total Project Committees there are, these F2F can overlap to minimize timeframe and yet not place an undue burden on the support staffs. Thus, if there are 6 Committees, the meetings may be able to be held over a 2-week span, with the "virtual training overlapping 2 Committees (training at the beginning and end of these meetings). This will accomplish getting the new members up to speed quicker and enabling this virtual training at a site that would be compatible to properly view it (an IRS Office).

Gilbert stated that Homeland Security Information Network, (HSIN) is a very effective method of virtual training. She mentioned that she will make inquiries on having the TAP staff and the TAP Project Committees receive training.

### **Timing of Project Committee F-T-F meetings for 2013.**

The members made the following suggestions:

Have new members start serving as TAP Volunteers in January not December. Projects should be defined; and completed by November of each year. TAP Staff and Program Owners will discuss the roles of the program owners on the project committees – what is required of them.

### **Social Media Facebook, Twitter, Linked In, Google+**

Members discussed and came up with some great ideas of getting the TAP message out. Marshalek mentioned that he provides updates of TAP on his Facebook account. He also mentioned other alternatives for distributing TAP information, posting snaps, flyers and event listings. Another suggestion was to have Russ Pool place a list of projects in process in TAP Space. Marshalek will provide a format for a newsletter for taxpayers to learn about TAP by August 22.

Other suggestions for social media advertising are to post, "Where is my Refund" and TAP Trifold fillable PDF in media tools. Berkey mentioned that Rena would provide some guidance from IRS vendors on how to get the word out to the public on TAP via social media.

**The meeting was adjourned for the day; it will resume on July 20, 2012 at 8:00 a.m.**

**Taxpayer Advocacy Panel  
Joint Committee Face-to-Face  
Meeting Minutes  
July 19 – 20, 2012  
8:00 a.m. – noon**

**Designated Federal Official**

- Tiffany Todaro                      Acting TAP Director

**Members Present**

- Eboni Moss                      TAP Chair
- Jackie Rollins                      TAP Vice Chair
- David Cain                      Chair, Face-to-Face
- Richard Bilancia                      Chair, SB/SE Decreasing Non-Filers
- Robert Hayden                      Chair, Tax Forms & Pubs
- Seth Flanders                      Chair, Taxpayer Burden Reduction
- Colleen Hitchcock                      Chair, Toll Free
- Boris Mikhail                      Chair, Screening Committee
- Mark Bernstein                      Chair, Return Processing
- Mark Marshalek                      Chair, Communication Committee
- Ken Donnelly                      Chair, Bankruptcy Compliance
- Jack Dell                      Return Processing Communications

**Members Absent**

- PK Purkayastha                      Chair, Refund Processing

**Staff Present**

- Louis Morizio                      TAP East Manager
- Steve Berkey                      Senior Program Analyst
- Susan Gilbert                      Senior Program Analyst
- Susan Jimerson                      TAP West Manager
- Russ Pool                      Database Analyst
- Rose A. Babb                      Management Assistant

**Members of the Public**

None

**Welcome**

Moss welcomed everyone back to the last day of the face-to-face meeting and recapped some of the discussions from July 19. Moss then turned the meeting over to TAP's Acting Director.

**TAP Director additional Comments**

Todaro provided an overview of the IRS/TAS and TAP office. She mentioned the IRM Section 7803 states that each state must have at least one LTA. There are a total of 74

LTAs and 5 in her home state of Oakland, CA. Todaro shared with members a view of TAPs Organization Chart. Members will be provided a copy of the SA Organizational Chart via email.

Donnelly recommended that outreach activities should be shared within the state where the TAP member resides. He also wants the outreach list to be posted on TAP Space for members to view. Berkey informed Donnelly that he can provide him with the Outreach plan but noted that since the list of LTAs changes frequently, he will provide him with the plan directly.

### **Outreach Training Report (Outreach Analysis Handout Jan – April 2012)**

Rollins provided a handout report on Outreach Analysis (January through April 2012). The Outreach Analysis report provided a breakdown on the committees' participation in outreach activities for the first quarter of the year. Rollins also shared a TAP flyer that she uses as a public service announcement in her town's local newspaper. Rollins also mentioned to the committee and staff the idea of having a TAP flyer used in a movie theatre just before showing movies, Berkey stated that the TAP flyer idea is being pursued and he would let all know if it is successful.

### **National Chair/Vice Elections & Chair Roundtable**

Berkey provided a hand out on TAP Nomination /Election Process "2011-2012" and briefly discussed the role of the Chair/Vice Chair. This will be identified by October. Moss requested three volunteer members that are serving in their third year. Cain will be the Chair for elections committee. Berkey stated that he needs two more volunteers to work with him on the election process.

Moss gave an overview of her role as Chair of TAP. She stated that 2012 was very difficult due to TAP's reorganization. However, she encourages members to think about the Chair position.

### **Executive Director of Systemic Advocacy**

Rena Girinakis welcomed the members and staff and provided a brief background of herself. Girinakis mentioned the following:

- All TAP meetings must be kept under \$20K; they cannot be large meetings therefore, the Annual Meetings that were held previously in Washington, DC will not happen going forward.
- A few comments made by Rena were around taking a look at TAP and possibly making some changes to the structure/looking for a way to reduce expenses
- Members are encouraged to bring issues via outreach or other taxpayer contact to the IRS; this avoids duplications. Girinakis discussed how Systemic Advocacy identifies and develops issues. There is an Information Project, IGP group. Issues come in through the buckets; there are also sub buckets.
- Girinakis discussed ways to develop issues via a template. Members received a handout "TAP Issue Bucket Template".

- Issues should not sit in a bucket for more than 10 days. Taxpayers should receive responses quickly before the issues go into other bucket list.

Another Joint Committee face-to-face meeting was mentioned by Girinakis but no details and possible dates were discussed.

**Closing – Eboni Moss**

The meeting was adjourned; Moss thanked everyone for the work that was accomplished at the meeting.

**Taxpayer Advocacy Panel (TAP)  
Joint Committee, (JC)  
Teleconference Meeting Minutes  
June 27, 2012**

**Designated Federal Official**

- Tiffany Todaro                      Acting TAP Director

**Members Present**

- |                     |                                    |
|---------------------|------------------------------------|
| • Eboni Moss        | TAP Chair                          |
| • Jackie Rollins    | TAP Vice Chair                     |
| • David Cain        | Chair, Face-to-Face                |
| • PK Purkayastha    | Chair, Refund Processing           |
| • Richard Bilancia  | Chair, SB/SE Decreasing Non-Filers |
| • Robert Hayden     | Chair, Tax Forms & Pubs            |
| • Seth Flanders     | Chair, Taxpayer Burden Reduction   |
| • Colleen Hitchcock | Chair, Toll Free                   |
| • Boris Mikhail     | Chair, Screening Committee         |
| • Mark Bernstein    | Chair, Return Processing           |
| • Mark Marshalek    | Chair, Communication Committee     |
| • Roger (John) Lees | Toll Free Project Committee        |

**Members Absent**

- Ken Donnelly                      Chair, Bankruptcy Compliance.

**Staff Present**

- |                      |                        |
|----------------------|------------------------|
| • Louis Morizio      | TAP East Manager       |
| • Steve Berkey       | Senior Program Analyst |
| • Susan Gilbert      | Senior Program Analyst |
| • Linda Rivera       | Senior Program Analyst |
| • Russ Pool          | Database Analyst       |
| • Janice Spinks      | Program Analyst        |
| • Nina Pang          | Program Analyst        |
| • Tim Shepard        | Program Analyst        |
| • Ellen Smiley       | Program Analyst        |
| • Patti Robb         | Program Analyst        |
| • Lisa Gabriel       | Program Analyst        |
| • Donna Powers       | Program Analyst        |
| • Marianne Dominguez | Program Analyst        |
| • Marisa Knispel     | Program Analyst        |
| • Meredith Odom      | Program Analyst        |
| • Rose A. Babb       | Management Assistant   |
| • Kevin A. Brown     | Management Assistant   |

**Members of the Public**

None

**Welcome/Announcements/Review Agenda**

Eboni Moss welcomed everyone to the teleconference. The minutes from May meeting were approved by the full committee for posting. Thanks to the panel members who participated in the recruitment interviews for new panel.

**National Office Report**

Tiffany welcomed everyone to the call and stated the following:

- The Executive Director of Systemic Advocacy, Rena Girinakis will be joining TAP members at the Joint Committee Face to Face meeting in Indianapolis, IN on July 19.
- Seven panel members resigned in 2012. Two of these resigned at the beginning of the year and were replaced with current alternates. The other vacancies will be filled when selections are made for the 2013 panel.
- The TAC Survey will be included in the June Report to Congress
- Regarding the I-10 Application, there was a leadership discussion; this will be worked on at the Systemic Advocacy - level.
- Kevin Brown, the new Management Assistant, for National Office was introduced.
- Wage and Investment (W&I) Surveys were conducted last Friday, June 22 and Monday, June 25<sup>th</sup>. Donna Powers noted that the members stepped up and made some good suggestions. National Office will be provided with those suggestions.

**TAP Chair Report**

Eboni mentioned the following:

- The face to face meeting agenda is not finalized; when this happens, it will be shared with the Joint Committee Chairs. If there are any questions when members receive the prereads material, please feel free to reach out to Eboni or Jackie.
- The face to face will be a great opportunity to meet Rena and Tiffany.

**Project Committee Review**

Issue #23716- Form 13285A

Seth reported that he spoke to Laurie Tuzynski, Senior TBR Advisor; she informed him that the TBR has a website. The TBR Project Committee had the opportunity to review

the site; they completed a write up of suggestions that were made to improve the flow. Some of these suggestions have been implemented already to receive the proper credit.

### **Screening Committee Category Results Report**

Boris discussed the list of Issues that were sent out to members as a pre read and Jackie commented on the following:

Issue #23507 Schedule D Form 8949 – the 8949 is the new schedule D It is similar to the old Schedule D1 they are not the same, there is no redundancy.

Issue #23723 – Jackie did a test on the fillable forms; they are working well. She noted that when asked to print, the computer prints the IRS PD Form. Also, if taxpayers are filing paper returns as opposed to electronic filing, they will not receive reject codes if there are problems.

Issue #23752 –There is a Column H on Schedule D; there is no need for any change and should not be sent to the Forms and Pubs Project Committee.

Issue #23351 – David mentioned that this issue appears to be a legislative issue and that it cannot be worked by TAP. The panel members agreed to have the IRS program owners provide feedback on this issue.

Issue #23515 will not be worked; the JC has decided to drop it.

### **Working Lunch at Face to Face Meeting in Indianapolis**

Jackie suggested to members a working lunch at the face to face meeting. The members agreed; lunch will be ordered and delivered.

### **Referral Development and Process Sheet**

Roger discussed the pre reads from his project committee face to face meeting in Fort Lauderdale. Some of his highlights to the JC Committee were:

- Goal Statement – Use that language in your referral
- Proposed solution- Make sure referrals are reasonable and attainable
- Keep things within reason

Roger will be the instructor for the QR Committee.

### **Updates: Internal Committees (Screening Communications & Outreach)**

Boris mentioned that his committee meets twice monthly. Presently, his committee will not be sending any comments and issues to the Project Committees.

Mark M mentioned that his committees have wrapped up the TAP Annual Report and have decided on the cover page.

Steve Berkey mentioned that the final version of TAP Annual Report has been delivered to an IRS employee in the Graphics Design Division; Steve will share the report at the JC meeting prior to the release.

Rollins mentioned that her outreach committee will meet on 7/27 at 10:00am. She hopes her ideas are helpful for member outreach. Jackie stated that she will continue to take an informal look at those members who are not sending outreach activities in to the TAP staff regularly.

PJ mentioned that David has a draft with suggestions on non-Technical and Technical issues. He will have a final report and some good suggestions to add to the JC.

PK also mentioned Refund Processing had a face to face meeting at the end of May and was very pleased with the SMEs participation. Some other comments were that the W&I Program Owners could have communicated more effectively. He would like to have this discussed at the joint committee face to face meeting.

Mark B mentioned his committee had their face to face meeting at the end of May. He hopes to have some issues sent to the JC for the next meeting. His committee reviewed the parking lot issues and stated that there are no viable issues to work at this time.

Russ will provide an updated list of parking lot issues to have the Return Processing Committee members review.

Richard mentioned that his committee has completed all drafts and will be sending them to all the full JC Committee members for review and comment. His subcommittees are making good progress.

Bob mentioned that his committee had a few issues and will pick up more. They are reviewing Publication 225. This pub will be split up in subcommittees and worked in groups. A deadline is set for July 7 to return to Marisa Knispel.

Seth mentioned that his committee is in the process of reviewing recommendations this will be ready for the August teleconference meeting.

Colleen mentioned that her face to face meeting in June was good; she hopes to be done with projects in the next few months.

### **Action Item**

Susan asked the Chairs of each committee poll their members for suggestions on any training they would like to see for the Virtual Training sessions. A deadline of July 16 was established.

### **Public Participation**

None.



### **Closing**

Eboni thanked everyone for joining the call. The next Joint Committee Meeting will be a Face to Face in Indianapolis, IN on July 19 through July 20.

**Taxpayer Advocacy Panel  
Joint Committee  
Teleconference Meeting Minutes  
May 23, 2012**

**Designated Federal Official**

- Tiffany Todaro                      Acting TAP Director

**Members Present**

- Eboni Moss                      TAP Chair
- Jackie Rollins                  TAP Vice Chair
- David Cain                      Chair, Face-to-Face
- Ken Donnelly                   Chair, Bankruptcy Compliance
- PK Purkayastha                Chair, Refund Processing
- Richard Bilancia              Chair, SB/SE Decreasing Non-Filers
- Robert Hayden               Chair, Tax Forms & Pubs
- Seth Flanders                 Chair, Taxpayer Burden Reduction
- Colleen Hitchcock            Chair, Toll Free
- Boris Mikhail                  Chair, Screening Committee
- Mark Bernstein                Chair, Return Processing

**Members Absent**

- Mark Marshalek                Chair, Communication Committee

**Staff Present**

- Louis Morizio                  TAP East Manager
- Susan Jimerson                TAP West Manager
- Steve Berkey                  Senior Program Analyst
- Susan Gilbert                 Senior Program Analyst
- Linda Rivera                  Senior Program Analyst
- Russ Pool                      Database Analyst
- Audrey Jenkins                Program Analyst
- Ellen Smiley                  Program Analyst
- Patti Robb                      Program Analyst
- Donna Powers                Program Analyst
- Rose A. Babb                  Acting TAP Director Secretary

**Members of the Public**

- None

**Welcome/Announcements/Review Agenda**

Eboni Moss welcomed everyone to the teleconference. The minutes from April meeting were approved by the committee.

### **National Office Report**

Tiffany welcomed everyone to the call and stated the following:

- TAP staff will begin the interview phase of recruitment in June.
- The IRS Program Owners have requested that all TAP recommendations be submitted to them through one analyst.
- Russ Pool, Database Analyst, will be that contact person between the program owners and TAP. These new procedures will enable the program owners to keep track and follow up on recommendations and responses.
- The program owners requested that a specific format be used for consistency; this procedure will come from the previous area committee procedures.
- If members are having problems locating their LTA's, Tiffany mentioned to feel free to inform her via TAP managers. Tiffany will also make contact with the LTAs to put them in contact with TAP's members.

### **TAP Chair Report**

Eboni mentioned the following:

- Thanks to TAP members for their participation in the National Taxpayer Advocate Survey. She sent an email acknowledging their participation.
- The Joint Committee Face-to-Face agenda for June is being worked on; if there is anything that members would like added to the agenda, they should contact Eboni Moss or Susan Gilbert.
- Susan Gilbert will include outreach on the JC agenda.

### **Screening Committee Category Results Report**

Boris Mikhail stated the following:

Out of the 39 Issues from the April 26 File, two were being dropped and one was recommendation to go forward to the Joint Committee. The ID Theft Issues will be forwarded by Curtis Freeman of Wage and Investment Unit to the ID Theft Task Force Unit.

### **Update on Internal Committees (Screening, Communications & Outreach)**

Boris asked the Joint Committee at what point does the screening committee cease referring new cases to other committees. Steve stated those issues can be brought to the JC face to face in July to review and bucket. Also, there should be a cutoff date to get those issues to the JC.

### **Outreach Activities**

Jackie Rollins stated that there has been a drop in outreach activities. For the first four months of this year, there was only 65 percent outreach participation. The project committee chairs have submitted a list via email with their members that have not participated in outreach activities for the last four months. Jackie mentioned that she will be making calls to members to encourage them to participate in outreach. She stressed, her contact with members will be a non-confrontational approach.

Anita Fields, Lisa Gabriel, Meredith Odom and Nina Pang will follow up with members to have them submit their outreach monthly as opposed to quarterly.

### **Communications**

Eboni reported for Mark Marshalek noting Communications is wrapping up the annual report. We were waiting on cover options. The next meeting will focus on using social media.

### **Recruitment**

Linda Rivera stated that the ranking phase of the recruitment period has been completed. There were 384 completed applications that were reviewed and ranked. TAP East has scheduled 52 applicants and TAP West has scheduled 63 to be interviewed. The interview process will begin in June. Tiffany mentioned that she will send an email to LTAs and other staff members in TAS requesting assistance with the interview process.

### **Project Committee Activities**

David Cain mentioned that his committee received some information from the IRS. He is compiling a list of those members that are not attending the meetings each month. He stated that committee is not meeting its quorum.

Ken Donnelly mentioned his committee's face to face meeting will be at the end of June; he is pleased with the progress so far. He also mentioned that his two subcommittees' attendance is good. The full committee will have a good proposal going forward to the IRS.

PK Purkayastha mentioned that he is looking forward to the face to face meeting and he hopes to complete all their assignments.

Bob Hayden reported his committee had their face-to-face in May. There were five focus groups; he provided a quick overview of some of the assignments that were done.

Colleen Hitchcock said her subcommittees are working very hard on finalizing issues. Attendance is very good and there are good outreach activities.

Mark Bernstein mentioned that he expects to have three issues that are being developed by his subcommittee. TAC review from taxpayer said an employee may have been helping out, and so was not able to answer questions for the taxpayers.

Richard Bilancia mentioned that his face to face meeting earlier this month was good. His committee restructured from three to two subcommittees. The subcommittees have finalized their topics for referrals and they are on track for the next teleconference.

Seth Flanders mentioned that his committee has their face to face meeting earlier this month. A lot was accomplished; there was good conversation with the program owners. There was a lot of discussion on Free File/Efile, audits and offers and compromises

### **Public Participation**

None

### **Closing**

Eboni thanked everyone for joining the call. The next teleconference call will be June 27, 2012, at 2:00 p.m. EST.

**Taxpayer Advocacy Panel (TAP)  
Joint Committee  
Meeting Minutes  
April 25, 2012**

**Designated Federal Official**

- |                  |                              |
|------------------|------------------------------|
| • Louis Morizio  | Acting TAP Director          |
| • Tiffany Todaro | Incoming Acting TAP Director |

**Members Present**

- |                     |                                  |
|---------------------|----------------------------------|
| • Eboni Moss        | TAP Chair                        |
| • Jackie Rollins    | TAP Vice Chair                   |
| • David Cain        | Chair, Face-to-Face              |
| • Ken Donnelly      | Chair, Bankruptcy Compliance     |
| • PK Purkayastha    | Chair, Refund Processing         |
| • Robert Hayden     | Chair, Tax Forms & Pubs          |
| • Seth Flanders     | Chair, Taxpayer Burden Reduction |
| • Colleen Hitchcock | Chair, Toll Free                 |
| • Boris Mikhail     | Chair, Screening Committee       |
| • Mark Bernstein    | Chair, Return Processing         |

**Members Absent**

- |                    |   |
|--------------------|---|
| • Richard Bilancia | Chair, SB/SE Decreasing Non-Filers      |
| • Mark Marshalek   | Chair, Communication Committee          |
| • Lucy Colby       | Vice Chair, SB/SE Decreasing Non-Filers |

**Staff Present**

- |                  |                               |
|------------------|-------------------------------|
| • Susan Jimerson | TAP West Manager              |
| • Steve Berkey   | Senior Program Analyst        |
| • Susan Gilbert  | TAP East Acting Manager       |
| • Linda Rivera   | Senior Program Analyst        |
| • Russ Pool      | Database Analyst              |
| • Audrey Jenkins | Program Analyst               |
| • Ellen Smiley   | Program Analyst               |
| • Patti Robb     | Program Analyst               |
| • Donna Powers   | Program Analyst               |
| • Rose A. Babb   | Acting TAP Director Secretary |

**Members of the Public**

None

**Welcome/Announcements/Review Agenda**

Eboni Moss welcomed everyone to the teleconference. The minutes from the March meeting were approved by the committee.

### **National Office Report**

Louis Morizio welcomed everyone to the call and stated the following:

Tiffany Todaro will be our new acting TAP Director effective May 7 for 90 days. She is a Local Taxpayer Advocate from Oakland, CA.

As of today, there are 332 completed applications and 400 in progress. Russ sent a last reminder to those applicants that have started their applications stating the deadline is Friday, April 27.

Due to the cancellation of the Annual meeting where all members would have met each other, TAP was unable to take pictures. Louis mentioned to members that they should take lots of pictures at their face to face meetings. It will be shared with TAP members and be use in TAP's Annual Report

### **TAP Chair Report**

Eboni welcomed everyone and asked the members if they had a chance to try the new Business Health Care Calculator if not, they should do so by May 4. In addition, she reminded members that feedback is still being accepted for the Annual Meeting Survey. Good luck to members with their face to face meetings, she hopes they can continue to motivate other members and feel free to contact the JC Committee anytime.

### **Project Committee Reviews**

Screening Committee Category Results Report – Boris Mikhail

Boris discussed several of the A & B files on the committee's two screening meetings.

The following has been decided by the committee:

Issue #22646 – (Return Processing: Taxpayer to Know Return Status) – will be referred to Refund Processing Delay Project committee.

Issue #22683 – (Payments: Installment Agreement Payment Posting) – will be referred to the Toll Free Project Committee.

Issues #23183 – (Free File), #23425 – (E-file: Return Rejected Communication to Taxpayer), #23413 – (Free E-File: IRS provide software not a third party) & #23414 – (Free E-File: IRS provide software not a third party) – will be referred to Taxpayer Burden Reduction Project Committee.

Issue #23289 – (Return Process: IRS Cause Burden-ID Theft) is dropped.

Issues #23433 – (E-file: Return rejected should say why) & #23962 – (E-file: IRS should offer other secure means to file) is dropped.

Issue #23551 – (E-file: Software changes cause refund delays) – will be going to Refund Processing Delays Project Committee.

### **TAC Survey**

Susan Gilbert stated that TAC surveys have been administered. She has received a total of 651 via mail from members and expects to receive a total of about 700. Susan will be on vacation from May 2 through May 9. Carol Hatch from SA is looking for an employee from SA to assist with the tallying of the surveys. If members have additional feed back regarding surveys, please send those comments to Susan.

### **Recruitment**

Linda Rivera mentioned that as of today, there are 335 completed applications and 492 in progress. Linda also asked the members to continue to encourage those that have not completed their applications to do so before April 27.

Russ Pool and Louis will work on downloading the completed applications.

Ranking for those applications will be done the week of May 7 through May 11 in Washington, DC by TAP Staff.

### **Update on Internal Committees (Screening, Communications & Outreach)**

#### **Screening Committee**

The committee discussed having a process in place to contact submitters of issues via self-mailer, web comment, outreach meetings and toll free calls. A temporary decision was made. TAP members that live in the state of the submitter can make contact with the submitter to provide follow up. This is an action plan for the Joint Committee Face to Face meeting in July to establish a procedure going forward.

#### **Communications Committee**

Eboni reported the committee is almost done with the Annual Report. The next focus for the committee is on social media and getting more exposure for TAP.

#### **Outreach Committee**

Jackie Rollins said the next committee meeting will be May 18 at 11:00 a.m. ET. She has been reviewing outreach reports that are sent to her and had found that issues reported on the spreadsheet were not being reported to the staff analyst. She found that these issues were not written down. This is something that will be addressed on the next outreach call and needs to be addressed at project committee meetings.

### **Project Committee Activities**

David Cain mentioned that the surveys did not address taxpayers that reside in remote locations.

Ken Donnelly mentioned his subcommittees, Communications and Process Definition. His subcommittees meet regularly and, there is great progress

PK Purkayastha mentioned that he is looking forward to the face to face meeting to work assignments.

Bob Hayden mentioned that he is preparing for the face to face meeting next week in Brooklyn. There is a full agenda which consist of 5 focus group items and issues in the parking lot.

Coleen Hitchcock mentioned that her subcommittees are very busy, preparing referral forms; their face to face meeting is June 1.

Mark Bernstein mentioned his subcommittees are working on some specific issues – Adoption Credits and ID theft. The Return Processing Face to Face meeting is in May.

Seth Flanders reported the committee is looking forward to their Face to Face meeting and getting a lot done.

### **Public Participation**

None.

### **Closing**

Eboni thanked everyone for joining the call. She reminded members to take pictures at their face to face meetings to include in TAP's Annual Report.

**Taxpayer Advocacy Panel (TAP)  
Joint Committee  
Meeting Minutes  
March 28, 2012**

**Designated Federal Official**

- Louis Morizio                      Acting TAP Director

**Members Present**

- |                     |   |
|---------------------|---|
| • Eboni Moss        | TAP Chair                               |
| • Jackie Rollins    | TAP Vice Chair                          |
| • David Cain        | Chair, Face-to-Face                     |
| • Ken Donnelly      | Chair, Bankruptcy Compliance            |
| • PK Purkayastha    | Chair, Refund Processing                |
| • Robert Hayden     | Chair, Tax Forms & Pubs                 |
| • Seth Flanders     | Chair, Taxpayer Burden Reduction        |
| • Colleen Hitchcock | Chair, Toll Free                        |
| • Boris Mikhail     | Chair, Screening Committee              |
| • Mark Bernstein    | Chair, Return Processing                |
| • Mark Marshalek    | Chair, Communication Committee          |
| • Lucy Colby        | Vice Chair, SB/SE Decreasing Non-Filers |

**Members Absent**

- |                    |                                    |
|--------------------|------------------------------------|
| • Richard Bilancia | Chair, SB/SE Decreasing Non-Filers |
|--------------------|------------------------------------|

**Staff Present**

- |                  |  |
|------------------|--|
| • Shawn Collins  | Executive Assistant to Director, Systemic Advocacy |
| • Susan Jimerson | TAP West Manager                                   |
| • Steve Berkey   | Senior Program Analyst                             |
| • Susan Gilbert  | TAP East Acting Manager                            |
| • Linda Rivera   | Senior Program Analyst                             |
| • Russ Pool      | Database Analyst                                   |
| • Nina Pang      | Program Analyst                                    |
| • Audrey Jenkins | Program Analyst                                    |
| • Marisa Knispel | Program Analyst                                    |
| • Ellen Smiley   | Program Analyst                                    |
| • Patti Robb     | Program Analyst                                    |
| • Rose A. Babb   | Acting TAP Director Secretary                      |

**Members of the Public**

- Sean Squire
- Jennifer Rodibaugh

### **Welcome/Announcements/Review Agenda**

Eboni Moss welcomed everyone to the teleconference. The minutes from February's meeting were approved by the committee.

### **National Office Report**

Louis Morizio welcomed everyone and stated the following:

Collins is on a long term detail as the Executive Assistant to the Director of Systemic Advocacy. He will be the Acting TAP Director for the next thirty days. Babb will be the Acting TAP Director's Secretary until the new Secretary is selected. Gilbert will be the Acting Manager for the TAP East Brooklyn office as well for thirty days.

As of this meeting, there have been 174 completed applications for the TAP recruitment and, 440 are in progress (started but not completed). Applicants that have started applications but not completed them will be contacted in an effort to have them finalized for the selection process. Morizio mentioned to members to continue to discuss TAP's recruitment during their outreach efforts – through media articles, television and the radio.

Two members have resigned from TAP, MJ Potenzzone and Brian Roy. Since the state of New Jersey has enough members, TAP will not recruit from NJ this year Morizio stated that he has reached out to alternates of New Hampshire to replace Roy.

Shawn Collins reached out to members and stated the following:

The TAP Charter has been signed by the IRS Commissioner for another two years. She thanked the members for being a part of TAP and mentioned that they should continue to be passionate and eager about the issues they bring to the IRS.

### **TAP Chair Report**

Eboni Moss welcomed everyone, she did not have anything new to discuss but, told the panel members that they should reach out to Jackie Rollins with any recruitment suggestions or questions they may have in talking with applicants.

### **Project Reviews**

Tax Forms & Pubs – Bob Hayden

Forms 1040, *Schedule C*, Form 8912, *Credits to Holders of Tax Credit Bonds*, Form 8949, *Sale and Other Dispositions of Capital Assets*, 1097BTC and Publication 509, *Tax Calendar* were approved by the Joint Committee.

Jackie Rollins suggested that 2012 Form Sch. C and the Instructions should be reviewed simultaneously.

### **Screening Committee Review – Boris Mikhail**

Issue #22034 Process for Reporting Abroad –This issue will be dropped.

Issue #22302 Form W-2 – The committee recommended this issue is referred to the Forms and Pubs Project Committee.

Issue # 22304 EFTPS Recurring Tax Payments – This issue will be dropped.

Issue #22350 Language Barrier – The committee decided to forward this issue to a TAP analyst for clarification on the actual topic.

Issue #22380 ITIN Application – This issue will be referred to the Taxpayer Burden Reduction Project Committee.

Issue #22387 Wage and Income Transcripts prior to 2001 – The issue will be dropped.

### **Recruitment**

Linda Rivera stated that we are now in the recruitment period; she mentioned to members that they should continue the recruiting effort during their outreach activities. Please review TAP Space for a Tab that is posted by state to see how many applicants in each recruiting state has applied.

All marketing and recruitment materials have been updated. There are several listings of improveIRS on Facebook.

### **Outreach**

Rollins mentioned that she sat in on a Toll Free Ad Hoc meeting on outreach. There were lots of discussions on types of outreach. She also placed an ad in her local newsletter using the TAP recruitment flyer. Ken Donnelly indicated his committee will be reaching out to Rollins for outreach suggestions on communicating the filing requirements to taxpayers

### **Project Committee Reports**

Boris Mikhail stated that his Screening Committee has a lot of issues. They have agreed to meet bimonthly via teleconference to review the issues. He will provide an update on the issue discussions at the next Joint Committee Teleconference in April.

Mark Marshalek stated that his Communications Committee is close to having the final draft on TAP's Annual Report to Berkey this Friday. Next week he plans to incorporate some photographs of TAP members for final review by the IRS. He also mentioned that he is exploring other media outlets to be used effectively to promote TAP.

Ken Donnelly mentioned that his Bankruptcy Compliance Committee had formed two project subcommittee meetings. The communications subcommittee will be working on ensuring that taxpayers that file for bankruptcy are in compliance with filing requirements. He also mentioned that the Process Definition subcommittee – will be focused on who does what and how. This committee will be finished with their assignments before the Joint Committee Face-to-Face Meeting in July.

PK mentioned that not much has happened with his Refund Processing Committee but, his committee has formed two subcommittees to take a look at the decision making meetings. He also mentioned he thought that there should be space set aside for a blurb on TAP is high use publications.

Mark Bernstein mentioned IRS Subject Matter Experts have been very helpful in answering questions for his committee.

Lucy Colby mentioned that the SB/SE Committee has split up into three subcommittees, IMF/BMF, Identify New Data Resource and New Outreach. Her outreach subcommittee had their first call this month.

Hayden mentioned that nothing is coming up for review next month. Since the last teleconference call, members of his subcommittee were given a copy of the parking lot list of issues. Each member was asked to submit a list to Knispel on the issues they would like to work. Currently there are two issues, subcommittees will be formed and the issues will be discussed at the next teleconference in April.

Seth Flanders indicated the committee didn't meet because of the problem with the Charter, but the subcommittees still continued working and all members are looking forward to the face-to-face in May.

Coleen Hitchcock mentioned that the Toll Free Committee has established two teams. Each team has set time tables to move the issues along. The teams have been meeting twice a month and have been very effective.

### **Public Participation**

Jennifer Rodibaugh did not have any questions, but wanted to know amount of the budget for our Face to Face Meetings.

Sean Squire had no questions but thanked the panel for allowing him to sit in on the meeting.

### **Closing**

Moss thanked everyone for joining the call; she reminded members if they have any questions regarding outreach activities feel free to reach out to Rollins.

Also, the Next Joint Committee call will be Wednesday, April 25, 2012, at 2 p.m., ET.

**Taxpayer Advocacy Panel (TAP)  
Joint Committee  
Meeting Minutes  
February 22, 2012**

**Designated Federal Official**

- Shawn Collins TAP Director

**Members Present**

- Eboni Moss TAP Chair
- Jackie Rollins TAP Vice Chair
- David Cain Chair, Face-to-Face
- Ken Donnelly Chair, Bankruptcy Compliance
- PK Purkayastha Chair, Refund Processing
- Karie Davis-Nozemack Vice-Chair, Return Processing
- Richard Bilancia Chair, SB/SE Decreasing Non-Filers
- Robert Hayden Chair, Tax Forms & Pubs
- Seth Flanders Chair, Taxpayer Burden Reduction
- Colleen Hitchcock Chair, Toll Free
- Boris Mikhail Chair, Screening Committee
- Aileen Fisher Vice-Chair, Screening Committee
- Mark Marshalek Chair, Communication Committee

**Members Absent**

- Mark Bernstein Chair, Return Processing

**Staff Present**

- Steve Berkey Senior Program Analyst
- Susan Gilbert Senior Program Analyst
- Linda Rivera Senior Program Analyst
- Russ Pool Database Analyst
- Louis Morizio Program Manager
- Donna Powers Program Analyst
- Audrey Jenkins Program Analyst
- Ellen Smiley Program Analyst
- Patti Robb Program Analyst
- Carolynn Kublnick Secretary

**Guest Speakers**

- Bridget Roberts Deputy Director, Systemic Advocacy
- Carol Hatch Operations Research Analyst, TAS

**Members of the Public**

None

### **Welcome/Announcements/Review Agenda**

Eboni Moss welcomed everyone to the meeting. Minutes from January's meeting were approved by the committee. Susan sent out a calendar reminder to everyone for the Joint Committee calls. If you have not received one, please contact Susan Gilbert.

### **National Office Report**

Moss turned it over to Shawn Collins for the National Office Report.

It has come to National Taxpayer Advocate (NTA) , Nina Olson's attention that Taxpayer Assistance Centers (TACs) were not doing things that they have done in the past to include, return preparation and allowing practitioners to file returns. The TACs have limited hours and appointments without notifying taxpayers. Taxpayers are being turned away or lines are extremely long. Nina thought that the TAP should get involved and conduct a survey to determine the impact of these changes on taxpayers. Nina hopes to include the findings in her June report to Congress. Carol Hatch from the TAS Research Office and Bridget Roberts, the Deputy Executive Director of Systemic Advocacy updated the TAP TAC survey from 2007. The project was presented to Moss and Jackie Rollins and they felt that this was a great thing for TAP to get involved with. This is still in the planning phase, so we ask that TAP members do not share this with anyone outside of the TAP.

Collins turned the conversation over to Bridget Roberts to discuss the plan with the members. Roberts spoke about how they are concerned about the changes in service that is being provided at the TACs, without notifying the taxpayers. The purpose of this survey is to find out how these changes are affecting the taxpayers. They put together a proposed two page survey to be given out at the TACs during the last week of the filing season. The plan is to survey taxpayers that are waiting in line to receive services. This doesn't require the TAP members to setup a table or wait for customers to receive service first. The survey should take no more than 5-10 minutes. Louis Morizio stated that the Face-to-Face committee wanted to create a survey so Roberts and Hatch worked with him on incorporating some of those questions into the new survey.

Moss asked if there was a goal for a specific number of surveys? Hatch stated that the survey is not going to be statistically valid; the NTA just wants a snapshot of what is going on in the TACs. Steve Berkey noted that we are going to be doing an analysis of members who live close to a TAC office, and then ask them to hand out the surveys. Collins noted that travel expenses will be reimbursed for members that participate. Hatch and Roberts stated that the more surveys the members get, the better. The more people that take the survey, the more sound the results will be. Moss stated her sentiments again on how this was a great way to get involved. She realizes this is a busy time for those that are practitioners, and if you aren't able to participate, encourage participation from your fellow members. This also allows you to get the TAP name out there in the public.

The survey is going to be sent out to the joint committee and the face-to-face committee for review. The deadline for suggestions and changes is March 9. Roberts asked again that this information not be shared outside of TAP. The National Taxpayer Advocate is

going to fully brief W&I and Field Assistance about the survey so please don't discuss this in your project committees if you have any of those members present.

### **TAP Chair Report**

Moss didn't have anything for her chair report. She did note that she sent out an update email a couple weeks ago and reminded everyone to log into TAPSpace and update their profiles. Continue with your outreach efforts and keep Rollins in the loop with anything that you do. If you have questions or concerns, Moss can be reached on email and by phone.

### **Project Committee Reviews**

Tax Forms & Pubs – Bob Hayden stated that the committee divided Pub 535 into four sections. Each sub-committee has 3 chapters to review. This is an accepted format for the IRS. The committee is searching for consensus to elevate this up to the IRS. Moss noted that in chapters 4-6 there was a column that wrapped around. On some of the project referral forms, business expenses publication was italicized, and on some it was not. Moss only found cosmetic issues. Marisa Knispel is in charge of reviewing those before it goes further.

Colleen Hitchcock had a question on chapter 11. For number 15 (pg 41), there were comments that said omit and one said do not omit. It is going to be up to the IRS to decide if it is omitted or not.

With the cosmetic changes, the committee reached consensus that this can be elevated to the IRS.

### **Screening Committee Category Results Report**

Moss turned it over to Boris Mikhail to talk about the screening committee.

Mikhail asked the Joint Committee for help in the "other" category. We need to determine what committees these items are going to be assigned to. The first issue was #20382. Moss did a search on the IRS website and found that Pub 555 addresses the issue. The committee reached a consensus that this item should be dropped. The committee also decided that issue #23109 be dropped.

There were four issues under route to current project. Moss suggested that in the future, there should be a note stating what committee these issues were going to be routed to. Seth Flanders wanted to see notes describing the rationale behind the Screening Committee's decisions. He thought that if they could see those notes, the joint committee wouldn't be going over things that the screening committee already talked about.

Rollins felt that issue #22220 dealt more with e-services rather than tax forms and pubs. It was decided that this should be stopped from going to current project, and is be routed back to the Screening Committee for further research.

Moss thought that issue #22852 (route to project) and issue #22710 (dropped category) were the same issues. She recommended that both be dropped.

Rollins wanted to discuss issue #22475. She wanted to know if a response was being sent to the person that suggested this issue. Louis stated that if we have the contact information and TAP is not going to deal with the issue, a letter will be sent out to the person that made the suggestion.

Moss wanted to discuss issue #22681 regarding what happens with TAS complaints. She remembered that in the past, TAS complaints were sent directly to the National Taxpayer Advocate. She wanted to see if that was still being done. Russ Pool stated that this issue was being dropped because it has been worked already.

Rollins wanted to know about issue #22844. She wondered if we had the letter to look at because the issue was that the TP didn't like the tone of the letter. The screening committee didn't have the letter to look at. Pool stated that the issue could be sent back to research to see if we can find a copy of the letter. Donna Powers was able to find the letter in SAMS. The letter is being sent to Mikhail and the screening committee.

Flanders wanted to discuss issues #22745, #22587, #23113 that had the main category of e-file. He did not want to dispute that these issues were being dropped, but rather bring it to the attention of the screening committee that one of the main focuses of the TP Burden Reduction Committee was e-file. He stated that other issues that come in that deal with e-file should be routed to the TPBR Committee for review to see if they fit with the projects that they are currently working, before being dropped by the screening committee. They were dropped because the screening committee felt that the website had sufficient information.

Rollins felt that issue #22409 should not be dropped. It was decided by the committee that this issue should go to the Forms and Pubs committee.

Rollins thought issue #22983 should not be dropped. The committee has decided to send this issue back to the screening committee for further development.

Collins thought that instead of sending everything back to the screening committee for another look, the joint committee should get the notes on each of the dropped issues so that we can see the rationale behind why these items are being dropped.

Aileen Fisher mentioned that one of the criteria for dropping an issue is that if an issue was worked in the past, it is being dropped. Issues that are being worked currently by a committee are associated with the issue that is already opened. No one had any questions with the screened category.

Flanders mentioned that the instructions for screening should be sent again with next month's issues. He also stated that the primary and secondary categories that an issue could fall into should also be sent. The committee agreed this would be helpful. Russ stated that he would get the list to everyone for the next meeting.

### **Recruitment**

Berkey stated that March 19 begins the recruitment period. We are going to be recruiting in 27 states. Testing for the online application will be happening in the next few weeks. We will be seeking help in ensuring that the online application is working properly before we go live. Promotional materials regarding recruitment will also be going out to members to use in their outreach efforts.

### **New Outreach & Volunteer Hours Report**

Rollins stated that the new reporting sheet went out to everyone. Rollins wanted to make sure that everyone is using it and remembering to put your hours down. Susan Gilbert stated that we tried to make the new outreach report as easy to use as possible. If you have any questions or issues contact your analyst.

It is important to keep track because TAP is hoping to use this information for the annual report, as well as for the Presidential Awards. Encourage your fellow panel members to fill it out on a consistent basis!

### **Update: Mentoring**

Linda Rivera stated that all mentees have been matched up with mentors within their project committees. Project committees have been instructed to add mentorship to the agenda on a monthly basis to ensure all members are getting everything they need out of the mentorship program. The mentorship program isn't open to just new members. If there are any other members that feel that they want to have a mentor, contact your project committee analyst, and they will match you up.

### **Update: Internal Committees**

#### **Screening**

Mikhail began with the screening committee. He stated that he is going to take what was discussed back to the screening committee and implement the changes that were suggested.

#### **Communications**

Moss stated that the committee is working on the annual report. They have an internal deadline of March.

#### **Outreach**

The Outreach Committee has decided that they aren't going to meet every month. The next meeting is on March 16. The things that Rollins has developed for outreach can be found on TAPSpace. Rollins is looking forward to the survey opportunity that was presented earlier in the call. She believes that great things can come from members going out to the walk-in sites. Rollins encouraged everyone to keep their outreach ideas coming!

### **Project Committee Activities**

#### **Face-to-Face – David Cain**

The committee found out that the IRS is testing some things that will enhance what is happening at the centers. The IRS is going to provide a list to the committee so that they aren't working on something that is already being worked.

#### Bankruptcy Compliance – Ken Donnelly

The committee has broken into 3 sub-projects. The leads of those projects have been elected. They have their next meeting on March 13<sup>th</sup>, where they will bring everything together.

#### Refund Processing – PK Purkayastha

The committee is collecting data. They haven't formed sub-committees yet, but hope to in the next meeting now that they have an understanding of what the committee is about.

#### Return Processing – Karie Davis-Nozemack

The committee has divided into 3 sub-committees. One will address procedural delays, one will address communications and the last will address tax credits. The tax credit sub-committee is currently looking at the adoption tax credit. They are in the process of finding subject matter experts and are also doing outreach to gather more issues that the committee can work.

#### Tax Forms & Pubs – Bob Hayden

The committee has 3 forms and one schedule in quality review. They hope to have those ready for the next joint committee call.

#### Taxpayer Burden Reduction – Seth Flanders

The committee is currently broken into 2 sub-committees. One will be focusing on technology improvements, with a primary focus on e-file, and the other will look at process improvements.

#### Toll Free – Colleen Hitchcock

The committee is looking at the issues that have been brought up and have divided them into 5 categories. The committee is broken up into 2 sub-committees. Each subcommittee has selected one of the categories to work first. The first is working on menu options. The second sub-committee is looking at information accuracy.

#### SB/SE Decreasing Non-Filers – Richard Bilancia

Bilancia had to sign off the call early, so there is no information to report from his committee.

#### **Closing**

Moss wanted to thank everyone for staying on the call. It ran a little over the allotted time, and she hopes that with some improvements to the screening process, the next meeting will be smoother. She said that if anyone has any comments or concerns, email herself or Rollins.

The next Joint Committee call will be Wednesday, March 28, 2012 at 2pm, ET.