

2016 Meeting Minutes Joint Committee (JC)

- November 30, 2016
 - November 16, 2016
 - October 26, 2016
 - September 28, 2016
 - August 31, 2016
 - July 27, 2016
 - June 29, 2016
 - May 25, 2016
 - April 27, 2016
 - March 30, 2016
-

Joint Committee (JC) Taxpayer Advocacy Panel (TAP) Meeting Minutes November 30, 2016

Designated Federal Official (DFO)

- Cedric Jeans Acting TAP Director

Members Present

- Gina Jones National TAP Chair
- Gretchen Cooney National TAP Vice-Chair
- Jeanne Matthews Chair, Taxpayer Communications Project Committee
- Dan Halleman Acting Chair, Tax Forms and Publications Project Committee
- Elizabeth “Liz” Chaney Chair, Special Projects Committee
- Sean McPhilamy Chair, Toll-Free Phone Line Project Committee
- Richard “Kent” Christensen Chair, Taxpayer Assistance Center (TAC) Improvements Project Committee
- Dan Halleman Chair, Internal Communications Committee
- Joan Ogden Vice-Chair, Toll-Free Phone Line Project Committee
- Sallie Mullins Thompson Member, Notices and Correspondence Project Committee
- Diana Nelson Member, Notices and Correspondence Project Committee
- Sue Wennermark Member, Notices and Correspondence Project Committee
- William “Bill” Green Member, Notices and Correspondence Project Committee
- Scott Wallace Member, TAC Project Committee
- Scott Hall Member, TAC Project Committee
- Holly Hoffman Member, TAC Project Committee
- Shelby Lyon Member, Special Projects Committee



- Mary Florence
- LeAnna Wilson

Member, Special Projects Committee
Member, Tax Forms and Publications Project Committee

Members Absent

- Mary Kautzman
- John Slough

Chair, Tax Forms and Publications Project Committee
Chair, Notices and Correspondence Project Committee

Staff

- Kevin Kelly Deputy Executive Director of Systemic Advocacy (DEDSA)
- Susan Jimerson Chief, TAP West
- Kim Vinci Program Analyst
- Linda Rivera Program Analyst
- Kudiratu Usman Program Analyst
- Antoinette "Toni" Ross Program Analyst
- Theresa Singleton Program Analyst
- Gretchen Swayzer Program Analyst
- Linda Swensen Program Analyst
- Fred Smith Program Analyst
- Robert Rosalia Program Analyst
- Matthew "Matt" O' Sullivan Program Analyst
- Carolyn Sanders-Walsh Senior Tax Analyst, SB/SE
- Debbie Awalt Program Analyst, W&I
- Annie Gold Management Assistant
- Kevin Brown Management Assistant

Welcome, Review Agenda

Gina Jones welcomed everyone to the call and reviewed the agenda for the last meeting of the year. Kevin Kelly, DEDSA, will be on the call after the DFO National Office Update.

Roll Call

Quorum was met.

DFO/National Office Update

Cedric Jeans thanked the Panel for all the work this year and acknowledged that a lot was accomplished as a result. Jeans pointed to the many referrals that were elevated to the IRS and the usage of new technology such as the WebEx collaborative meeting software. The face-to-face meetings will be established as soon as the TAP 2017 selection package is approved.

The National Taxpayer Advocate is holding the 2nd International Conference on Taxpayer Rights on March 13-14, 2017, in Vienna, Austria.



Jeans also reported the TAP Member Survey is in progress right now and will be available for all members through December 18, 2016, so please complete.

The DEDSA, Kevin Kelly, thanked everyone for all their efforts for the entire year. Kelly indicated that everyone's time and efforts are appreciated by NTA. Kelly thanked third year members and congratulated Kent Christensen and Sallie Mullins-Thompson for becoming the Chair and Vice-Chair for 2017.

Jeans mentioned outreach can still be done by retiring members since they may still affect the public. Jeans mentioned that the projects and proposals for next year are currently being reviewed and we will be accepting any additional items if any members would like to present them to their committee analyst.

TAP Managers Update

Susan Jimerson thanked members for their work this year. Jimerson reported Matt O'Sullivan will be the new analyst for the Special Projects committee. Shelby Lyon, the international member, is resigning from TAP. She will listen in when time permits and offer international concerns when she can.

TAP Chair Report

Jones said it has been a successful year and thanked all of TAP staff for all they have done this year. Jones reminded the committee of a personal goal she had coming into this TAP year of timely submission of the annual report, which has been accomplished. Jones thanked Gretchen Swayzer and the Annual Report Ad Hoc committee for getting the report submitted timely. Jones thanked the review team and Annual Report committee for all their efforts. Jones reported that setting a standard date for the face-to-face meeting will have to be moved to next year. This will be addressed by next year's committee. Jones wants focus to be on the issues to be elevated and not the housekeeping for this meeting since it will be a long meeting. The referrals will be cleaned up before the issues move forward to the IRS.

Approval of Meeting Minutes

N/A

TAP Vice-Chair Report

Gretchen Cooney spoke about outreach and the efforts of the Outreach Committee this year. Cooney spoke about an outreach presentation during the face-to-face meetings next year. Cooney thanked Jones for her leadership this year.

Public Comments

None

JC Quality Review (QR)

Jones asked the committee if they think this needs to be brought back. Kent Christensen and Joan Ogden are in favor. Jeanne Matthews seconded the motion as long it does not hold up referrals for long periods of time.

Matthews recommended more training for committee level quality review. Jones does not see this as adding a time delay. Halleman suggested JC QR communicate directly with the Committee QR to streamline the communication process. No one was in opposition to this proposal. The details of this team will be worked out by next year's committee. Christensen, Thompson and the staff will develop this process.

Action Item: There will be a Joint Committee Quality Review Team for 2017.

Project Committee Review/Activities

Taxpayer Communications (TCC) Chair – Jeanne Matthews

Matthews reported that they had no subcommittee meetings last month due to no issues to work. The committee is looking forward to next year and working on issues for then.

Tax Forms and Publications, Acting Chair – Dan Halleman

Halleman reported that this year was not done with direct input by the IRS staff for guidance except for the committee's first two issues. Most issues this year came from their parking lot, public outreach, etc.

- Issue #31580, *Fillable Form 1099*

The primary issue was to improve Form 1099 and to make it fillable. Consideration has to be paid to special events such as renting homes for less than 15 days, in which funds do not have to be reported. Improving the form might address this. In Item Number 2, Ogden suggested a word change of "...fewer than 15 days..." instead of, "...less than 15 days..." Jones suggested adding in Box 1 a check box asking, "Is this a primary residence?" since that is the key to the issue. Cooney explained that this should be put on Schedule E, then backed out because the residence is primary residence. Name of IRS Program Owner suggested to be removed by Matthews. Awalt mentioned *Publication 527 Residential Rental Property (Including Rental of Vacation Homes)*. Based on the complexity of this issue and the lack of clarity, this issue will not move forward. Jones motioned, McPhilamy seconded the motion to reject the issue and review the instructions of the forms next year.

Action Item: Issue Rejected, and the instructions will be reviewed next year.

- Issue #34309, *Publication 17*

Number 3 – word correction in reason/comments, has already been corrected by Jones in the most recent version. Number 5 – first paragraph in Change section should be moved to reason/comments. Phone number 866 512-1800 is what has to be used to request a hard copy of *Publication 17*, for a fee. It should be indicated that fax and mail are also options. IRS Program owner name suggested to be removed. Halleman indicated the names will be removed from all subsequent referrals moving forward.

Action Item: Elevated with corrections made.

- Issue #34354, *Form 1040 Instructions*

The purpose of this referral is to ensure that hyperlinks go to the right place and to make the Form 1040ES fillable electronically. Jones and Matthews suggested Project Statement correction to, "...which relate to 1040 forms and publications."

Thompson suggested changing Section 1 Change section paragraph to read, "...consistent with information in Pub. 17." Chaney motioned, Christensen seconded.

Action Item: Elevated with recommended changes proposed.

- Issue #29425, *Publication 560*

Benefits and Barriers Section, Add: "...**retirement** plans contributions..." Chaney motioned, Christensen seconded.

Action Item: Elevated with recommended change.

Taxpayer Assistance Center Improvements, Chair – Kent Christensen

- Issue #35292, *TAC Appointment Confirmation*

Recommendation section change to: "The confirmation message will be in the form of a return phone call, letter or electronic text or e-mail." The Recommendations section will be made into four bullets. Jones recommended Chaney seconded.

Action Item: Elevated with suggested format changes.

- Issue #35283, *TAC Signage*

Take Holly Hoffman's name out since it is on twice. Recommendation 2 Add an exclamation point to "GET HELP" and delete the words "Guide to" for the title for consistency. Chaney recommended Matthews seconded.

Action Item: Elevated with suggested changes.

Notices and Correspondence, Chair – John Slough

- Issue #30197 & 34678, *Varying Use of Case Identification Numbers (CINs)*

Part of exhibits un-redacted to include the reference number. TM changed to "Issue Submitter" Chaney motioned and Christensen seconded.

Action Item: Elevated with format changes and corrections.

- Issue #17399, *Payment Due Dates are Ambiguous*

Diana Nelson suggested adding Issue referral number on each exhibit. Exhibits updated to "received in our office by" and in the Benefits and Barriers section. Chaney motioned and McPhilamy seconded.

Action Item: Elevated with format changes and consistency corrections.

Toll-Free Lines, Chair – Sean McPhilamy

- Issue #35056, *PSA in Message on Toll-Free Phone Lines*

Indicate Number of issues as one on the referral. Matthews motioned and Chaney seconded.

Action Item: Elevated with suggested change.

Special Projects, Chair – Elizabeth Chaney

- Issue #35166, *International SSN Checkbox Form 1040*

Lyon presented issue. This referral should only be applied to electronic filing according to Chaney. Mary Florence highlighted how important this issue is for taxpayers who live abroad and the major issues that come without having the ATIN. Jones requested consistency before the SSN, either “a” or “an.” Florence indicated the change has already been made to “an” and will be noted in the final referral. Chaney suggested correcting the Goal Statement to indicate this referral is for the electronic version of the Form 1040 just as the paper copy offers. The name of the IRS program owner should be removed. Matthews motioned, Halleman seconded.

Action Item: Elevated with proposed changes

Internal Communications, Chair – Dan Halleman

Halleman reported the success of the Facebook administrator change to Collette Keaton. The final newsletter of the year is to be published for next month as a general closing out. No committee chair reports required. Sunny Luu will be on this committee next year. Jones recognized the changes to the newsletter and appreciated the changes.

Round Table

Jeans thanked the committee for all their work, especially with all the referrals for this year.

The committee thanked Jones and Cooney for their leadership this year.

Closing

Jones thanked everyone for their time and patience throughout this call and TAP year. Jeans officially closed the meeting.

Next meeting: TBD

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

**Leadership Committee
IRS Environmental Scan
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
November 16, 2016**

Designated Federal Officer

- Sheila Andrews TAP Director

Members Present

- Gina Jones National TAP Chair
- Gretchen Cooney National TAP Vice-Chair
- Jeanne Matthews Chair, Taxpayer Communications Project Committee
- Dan Halleman Acting Chair, Tax Forms and Publications Project Committee
- Richard “Kent” Christensen Chair, Taxpayer Assistance Center (TAC) Improvements Project Committee
- Dan Halleman Chair, Internal Communications Committee
- Elizabeth “Liz” Chaney Chair, Special Projects Committee
- Joan Ogden Vice-Chair, Toll-Free Phone Line Project Committee
- John Slough Chair, Notices and Correspondence Project Committee
- Sean McPhilamy Chair, Toll-Free Phone Line Project Committee
- Sallie Mullins Thompson Member, Notices and Correspondence Project Committee

Staff Present

- Susan Jimerson Chief, TAP West
- Kim Vinci Senior Program Analyst
- Matthew O’ Sullivan TAP Program Analyst
- Traci Suiter Senior Program Evaluation and Risk Analyst

The purpose of this ad hoc meeting was to solicit opinions and gather confidential feedback of TAP members. The questions asked are listed below.

Welcome/Opening

Susan Jimerson opened the call and welcomed all participants. Jimerson then turned the call over to Traci Suiter to start the interview questions. Suiter indicated that the purpose for this environmental scan was to identify internal challenges and opportunities for improvement as part of the IRS strategic plan.

Taxpayer Advisory Panel Interview Questions

1. What do you think are the top strengths and weaknesses of the IRS?

2. What opportunities might the IRS be overlooking that could improve its operations?
3. What is the IRS not doing now that it needs to be doing?
4. Can you identify a relatively small problem the IRS can fix now that would have a major impact on our stakeholders and taxpayers?
5. What trends from other areas of government and/or the private sector are you aware of that might have an impact to the IRS?
6. Are there solutions to IRS problems from other areas of government or the private sector that you would recommend the IRS consider?
7. What are some continuing and new issues in IRS correspondence with taxpayers?
8. What is the most significant issue that the IRS needs to address for its toll-free phone lines?
9. What is the most significant issue that the IRS needs to address in its Taxpayer Assistance Centers?
10. Are there partnerships the IRS could be taking advantage of that you think it is not?
11. What criteria would you use to measure “success” for the IRS?

Closing

Suiter thanked the committee for their time and officially closed the meeting.

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

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
October 26, 2016**

Designated Federal Official (DFO)

- Sheila Andrews TAP Director

Members Present

- Gina Jones National TAP Chair
- Gretchen Cooney National TAP Vice-Chair
- Jeanne Matthews Chair, Taxpayer Communications Project Committee
- Dan Halleman Acting Chair, Tax Forms and Publications Project Committee
- Richard “Kent” Christensen Chair, Taxpayer Assistance Center (TAC) Improvements Project Committee
- Dan Halleman Chair, Internal Communications Committee
- Elizabeth “Liz” Chaney Chair, Special Projects Committee
- Joan Ogden Vice-Chair, Toll-Free Phone Line Project Committee
- John Slough Chair, Notices and Correspondence Project Committee
- Sean McPhilamy Chair, Toll-Free Phone Line Project Committee
- Sallie Mullins Thompson Member, Notices and Correspondence Project Committee
- Joan Ogden Vice-Chair, Toll-Free Phone Line Project Committee
- Diana Nelson Member, Notices and Correspondence Project Committee
- Sue Wennermark Member, Notices and Correspondence Project Committee
- Paul Lubell Member, Special Projects Committee
- LeAnna Wilson Member, Tax Forms and Publications Project Committee
- William “Bill” Green Member, Notices and Correspondence Project Committee
- Shelby Lyon Member, Special Projects Project Committee
- Mary Florence Member, Special Projects Project Committee

Members Absent

- Mary Kautzman Chair, Tax Forms and Publications Project Committee

Staff

- Sheila Andrews TAP Director
- Susan Jimerson Chief, TAP West
- Kim Vinci Program Analyst
- Lisa Billups Program Analyst
- Donna Powers Program Analyst
- Antoinette “Toni” Ross Program Analyst
- Theresa Singleton Program Analyst
- Gretchen Swayzer Program Analyst
- Fred Smith Program Analyst



- Robert Rosalia Program Analyst
- Deanna Lewis Program Analyst
- Tamikio Bohler Program Analyst, W&I
- Karen Rice Public Affairs Specialist
- Kevin Brown Management Assistant

Welcome, Review Agenda

Andrews opened the call and welcomed everyone. Andrews also thanked the members for all they have done to make this a successful year for TAP.

Roll Call

Quorum was met.

DFO/National Office Update

Andrews reported that she would not be on the next JC call due to scheduling conflict. Andrews reminded the committee that the Chair and Vice chair elections are coming up and that the Meet the Candidate call would be held for the members to meet those seeking the TAP Chair and Vice-Chair positions.

Andrews reminded returning members project assignment requests for next year will be coming out as well. The January face-to-face meeting is dependent on when we receive approval. It is highly unlikely it will occur in January based on where we are currently in the approval process. Tomorrow is the last All TAP Virtual meeting of the year. Andrews thanked Gina Jones and Gretchen Cooney for making this a successful year and their great leadership.

TAP Managers Update

Jimerson reported there was nothing new at this time. Jeans reminded the committee that as we get closer to the end of the year, we are trying to wind up the work for this year and analysts should send a notification to keep members engaged for the last committee meetings of the year. This will help us get stuff done through the final part of the TAP year.

TAP Chair Report

Jones reminded the chairs to be ready to report out a summary of their committee work for the All TAP Virtual meeting tomorrow at 2 p.m. EST. On the Meet the Candidate call next week, there will be a 10-minute limit for the candidates to give their campaign speech. Although Jones will be retiring from the TAP, she wanted the committee to consider anything but January for the face-to-face meeting because of conflicts for practitioners. The first week in February works the best. Ogden spoke of the challenges for new members connecting and becoming part of their committee with having a later meeting, so the earlier the better. Cooney suggested making it as close to the approval of package as possible.

Suggestions were made to have it as early as possible as it does help getting the new members acclimated to the Panel. Andrews mentioned this is completely budget driven and also designed to allow members to connect better by meeting together.

Action Item: This topic will be tabled for next month's agenda.

Approval of Meeting Minutes

- August Virtual Face-to-Face – **Approved as submitted**
- September – **Approved as submitted**

TAP Vice Chair Report

Gretchen Cooney reported that some interesting outreach from the committee will be used as suggestions in the next newsletter. Cooney interacted with the Iowa Local Taxpayer Advocate at a Half Marathon where photos were taken. Jones thanked Cooney for their partnership this year.

Public Comments

None

Project Committee Review/Activities

Taxpayer Communications (TCC) Chair – Jeanne Matthews

Jeanne Matthews reported the committee had two issues approved and elevated last month. They are currently looking for new issues to work on at this time. The November meeting will be a discussion and preparation for the next year.

Tax Forms and Publications, Acting Chair – Dan Halleman

Dan Halleman reported minor recommendations may lead to a reconsideration of two partially accepted referrals from the IRS. This could lead to two projects for next year. The committee should have two issues for next month.

Special Projects, Chair – Elizabeth Chaney

Liz Chaney mentioned how proud she was of the large amount of work her Committee performed this year despite losing three members. Lyn presented Issue #35166 for approval. It was sent back to the project committee for modifications. It is expected to the referral will be sent to JC next month after some research from IRS.

- Issue #34929, *Update Streamlined Filing Compliance*

Paul Lubell presented the referral and noted that the IRS adopted some recommendations prior to this referral. The purpose of this referral is to define non-willful conduct clearly without referring to another document. This Referral seeks to add the form number to the Form 14654 to make it a helpful reference to the hyperlink. Lubell mentioned this form can only be viewed through Internet Explorer. Interim solution until the IRS can fix this issue.

- Reword the referral to be clearer to the IRS why we want the changes proposed.
- Remove the lead designation from the Members of Project Committee/Authors section.

- Renumber the recommendations one through six instead of 1, 2; 1, 2.
- Identify the web address in the Proposed Solutions section on page 1 and write it out. Write out Frequently Asked Questions instead of FAQs on page 3.
- Spell out GAO, Government Accountability Office.
- Add streamline filing procedures in full detail link to the title page of the website.

Action Item: Issue accepted, with the pending suggestions, to be elevated to the IRS.

Jones suggested making the form accessible using all other internet options as a parking lot issue to be considered for next year.

Taxpayer Assistance Center Improvements, Chair – Kent Christensen

Kent Christensen reported the committee had completed its survey of TAC managers. This generated ideas for this year and next year. The committee will be looking for suggestions for improving of the appointment system like sending reminders to help avoid people missing appointments. They are still discussing suggestions on where the Hate to Wait messages should be posted in TACs. They are still working on the Get Transcript issues. The Committee hopes to have two maybe three issues for next month.

Notices and Correspondence, Chair – John Slough

- Issue #30197, *Varying Use of Case Identification Numbers (CINs)*

Bill Green presented the referral for CINs. Thompson spoke of the second issue # 34678 which was closed because it was associated to the current issue 30197.

- Page 1 of the, Proposed Solution number 2, change the “It would also be beneficial” to “It should also be beneficial...”
- Page 2, Change first bullet point to “should have simple and easily identified Case Identifying Numbers.”
- The documents should be redacted.
- Remove blank pages from Exhibits A and B.
- Exhibit C should be Exhibit A, Exhibit A should be Exhibit B and Exhibit B should be Exhibit C.
- Make reference to the Taxpayer Bill of Rights (TBOR).
- Refer to the IRS Program office in addition to the Program Owner.

Action Item: Sent back to committee for corrections.

- Issue #17399, *Payment Due Dates are Ambiguous*

Leanna Wilson reported the changes in this Referral are needed to clarify the actual payment due dates are when the payment is electronically submitted, received by US Postal service, or received by the IRS.

- Stronger Project Statement – “The NAC has determined...”.
- Change the Exhibits to A, B, C, etc. instead of all exhibits being together as Exhibit A.
- Relate the referral to the TBOR with the proper wording.

- Remove the “committee chair” designation from the Members of Project Committee/Authors section.
- The Goal Statement second sentence should read, “...when payments **should be received** by...”
- Page two, third paragraph, change “distinguish” to “distinguishes.”
- Identify the IRS Program Office.

Action Item: Sent back to committee for corrections.

Toll-Free Lines, Chair – Sean McPhilamy

- Issue #33490, *Authentication Retention (AR) Technology*

Chaney suggested adding, “CSRs are also referred to as Assistors within this report.” In Proposed solutions number one page one.

Action Item: Approved to be elevated to IRS with suggested change.

Internal Communications, Chair – Dan Halleman

- Chapter 11, Successful Recommendations

Matthews suggested rewording the Outcome section. Halleman indicated this is only a draft to let the JC see what was being proposed.

Round Table

Jones suggested making sure all referrals have been reviewed and prepare for a long call next month.

Closing

Remember the All TAP Quarterly call tomorrow. Jones and Andrews closed the call.

Next meeting: Wednesday, November 30, 2016 @ 1 – 2:30 p.m. EST.

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

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
September 28, 2016**

Designated Federal Official (DFO)

- Cedric Jeans Chief, TAP East

Members Present

- Gina Jones National TAP Chair
- Gretchen Cooney National TAP Vice-Chair
- Jeanne Matthews Chair, Taxpayer Communications Project Committee
- Dan Halleman Acting Chair, Tax Forms and Publications Project Committee
- Richard “Kent” Christensen Chair, Taxpayer Assistance Center (TAC) Improvements Project Committee
- Dan Halleman Chair, Internal Communications Committee
- Elizabeth “Liz” Chaney Chair, Special Projects Committee
- Joan Ogden Vice-Chair, Toll-Free Phone Line Project Committee
- Gary Hoff Vice-Chair, Taxpayer Communications Project Committee
- John Slough Chair, Notices and Correspondence Project Committee
- Sean McPhilamy Chair, Toll-Free Phone Line Project Committee
- Sallie Mullins Thompson Member, Notices and Correspondence Project Committee

Members Absent

- Mary Kautzman Chair, Tax Forms and Publications Project Committee

Staff

- Sheila Andrews TAP Director
- Susan Jimerson Chief, TAP West
- Kim Vinci Program Analyst
- Lisa Billups Program Analyst
- Donna Powers Program Analyst
- Antoinette “Toni” Ross Program Analyst
- Theresa Singleton Program Analyst
- Gretchen Swayzer Program Analyst
- Fred Smith Program Analyst
- Robert Rosalia Program Analyst
- Deanna Lewis Program Analyst
- Kevin Brown Management Assistant
- Tamikio Bohler Program Analyst, W&I

Members of the Public

None

Welcome, Review Agenda

Gina Jones welcomed everyone to the call and noted that we have a full agenda today.

Roll Call

Quorum met.

DFO/National Office Update

Sheila Andrews reminded everyone of the informational session tomorrow, September 29, 2016, at 2 p.m. EST. One of the topics will be the Path Act and how it will possibly effect next year's filing season. If time permits we may cover the Private Debt Collection topic. Andrews also encouraged completion of the committee proposals for what will be the focus in the 2017 TAP year. This will be shared with the IRS and the National Taxpayer Advocate. Andrews also thanked the committee for all of their efforts day in and day out. Andrews announced that Robert Rosalia is on a detail, working with the Forms and Publications committee and Deanna Lewis and Linda Swensen are both on details to TAP.

TAP Managers Update

Susan Jimerson reported that Fred Smith will be taking over the Special Projects committee. Jimerson also thanked Stacia Jones for all of her efforts with the committee over the last several months. Jimerson indicated that there will be a referral today from the Notices and Correspondence committee and that there are some referrals expected from the Taxpayer Communications committee very soon.

Cedric Jeans reminded the committee to probe their members about possible projects for the 2017 TAP year.

TAP Chair Report

Jones thanked the committee for such a good and productive year. Jones also thanked Cooney for being the Vice-Chair. Jones reminded the committee that the entire panel will be voting for next year's TAP Chair and Vice-Chair. Jones recommended speaking to members before recommending them for such a position as a courtesy to ensure they would like to be considered.

Minutes Approval

August 31, 2016 minutes approved as presented.

TAP Vice-Chair Report – Gretchen Cooney

Cooney reported that outreach reports are being submitted better now and that there might be opportunities for virtual outreach next year.



Members of the Public

None

Project Committee Review/Activities

Taxpayer Communications (TCC), Chair – Jeanne Matthews

Matthews reported:

Issue 35038 – PATH Act – Due to the IRS making the public aware of this change and getting the word out. The committee will vote to drop the issue on October 20, 2016.

Issue 34106 – ITIN and Refundable Credit

Kent Christensen suggested the link on Solution Item #4 be corrected to:

<https://www.irs.gov/pub/irs-pdf/i1040s8.pdf>

The changed allows the link to take you to the instructions for Schedule 8812.

Decision: Consensus to elevate to IRS pending change to the above referenced hyperlink.

Issue 34108 – Exam and AUR Policy

Matthews confirmed the committee approved this referral on August 25, 2016, which was not noted on the pre-read form. McPhilamy requested clarification about what publications/documents were being eliminated to avoid duplication. No changes recommended.

Decision: Consensus to elevate to IRS.

Tax Forms and Publications, Acting Chair – Dan Halleman

Halleman reported the committee is working on Publication 560, *Self-Employment Retirement Accounts*. The goal is to get clarification on what is allowed. Halleman reported that the committee has received responses from the IRS on the referral for Form 7004, Form and Instructions. There may be a possible rebuttal on what was denied. A response was also received the referral for Publication 523, which is being reviewed.

Special Projects, Chair – Elizabeth Chaney

Chaney reported on Issue #31300, *Getting Transcript for IDT Accounts*

The goal is for tax practitioners to be able to obtain transcript information immediately instead of having to contact the IRS Identity Theft Specialized Unit. Dan Halleman asked had the committee considered the IRS is revamping E-Services next month. Chaney responded that the intended changes will not address this issue as this focuses on issues under an ID Theft PIN.

Decision: Consensus to elevate to IRS.

Chaney added that the committee is expecting another issue next month. Chaney concluded that the committee is working on two issues for 2017.

Taxpayer Assistance Center Improvements, Chair – Kent Christensen

Christensen reported that Subcommittee 1 is working on a survey for TAC managers as a way to improve the appointment exception. Subcommittee 2 has a referral currently in quality review. They hope to have it approved soon. The committee hopes to receive responses back from universities regarding letter. Christensen also reported that the committee is reviewing 2016 and planning for 2017.

Notices and Correspondence, Chair – John Slough

Issue# 34179 Review Templates for IRS Letters 0098c; 0099c; and 2057c.

Sallie Mullins Thompson reported that all edits from last month have been added to this referral. The following corrections were made:

The red numbers in the Goal Statements 0098c and 099c will made black before the referral is forwarded.

Exhibit A

The letters in the title will be written as LTRs 0098c and 0099c instead of 99a and 99c for continuity.

Exhibit B

- The letters in the title will be written as LTRs 0098c and 0099c instead of 99a and 99c for continuity.
- On Exhibit B, in the K-Y Sections, the number 5 U section has to have the action requested clearly identified in this section. The section will read, “in U section Change the first sentence to ‘we are not able to allow the...’” All of the numbers in each section will be made bold for continuity purposes.

Exhibit C

- The letter, in the title, “5027c” will be corrected to read “2057c.”
- The F Section, the word “uncertain” is to be correctly spelled.
- The Sections “j through z” letters need to be capitalized.
- The numbers in this exhibit will be put in bold format.

Decision: Consensus to elevate to IRS with suggested corrections.

Toll-Free Lines, Chair – Sean McPhilamy

McPhilamy reported that the committee is working on a possible rebuttal for a referral that was partially accepted by the IRS. The Authentication Retention Technology is being finalized prior to going to the JC and the PSA referral is working its way through legal. Both referrals are expected to be ready for next month’s JC meeting.

McPhilamy concluded that the committee continues to work on referrals for next year. Joan Ogden echoed the total rejection of the referral. Jones recommended adding additional information to the submission to justify the rebuttal.

Internal Communications, Chair – Dan Halleman

Halleman reported the committee is still revising Chapters 11 and 20 of the Member's handbook. The hope is to have it available for next month's meeting.

Roundtable Discussion

Jones commended committee for the four referrals presented to JC today and praised the readiness of the referrals through the Quality Review (QR) process making it easier to be reviewed at the JC level. Susan Jimerson reported that the 2016 Annual Report Committee had first meeting. The committee only has four volunteers and welcomes more help to work the plans for this year's report. Jimerson stated that we would like additional members on the committee to make the work a bit easier. Jimerson asked the chairs to solicit additional members. Jimerson stated that the goal is to have the report published by the beginning of 2017.

Jones gave kudos to Gail Reese for volunteering to lead the Annual Report Committee for the third year in a row.

Closing

Cedric Jeans thanked everyone for participation on the call.

**Next meeting: October 26, 2016
1 p.m. EST; Noon CST; 11 a.m. MT; 10 a.m. PST**

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

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
August 31, 2016**

Designated Federal Official (DFO)

- Susan Jimerson Chief, TAP West

Members Present

- Gina Jones National TAP Chair
- Gretchen Cooney National TAP Vice-Chair
- Jeanne Matthews Chair, Taxpayer Communications Project Committee
- Dan Halleman Acting Chair, Tax Forms and Publications Project Committee
- Richard “Kent” Christensen Chair, Taxpayer Assistance Center (TAC) Improvements Project Committee
- Dan Halleman Chair, Internal Communications Committee
- Elizabeth “Liz” Chaney Chair, Special Projects Committee
- Joan Ogden Vice-Chair, Toll-Free Phone Line Project Committee
- Gary Hoff Vice-Chair, Taxpayer Communications Project Committee
- John Slough Chair, Notices and Correspondence Project Committee
- David Jones Member, Toll-Free Phone Line Project Committee
- Sallie Mullins Thompson Member, Notices and Correspondence Project Committee

Members Absent

- Sean McPhilamy Chair, Toll-Free Phone Line Project Committee
- Mary Kautzman Chair, Tax Forms and Publications Project Committee

Staff

- Cedric Jeans Chief, TAP East
- Kim Vinci Program Analyst
- Linda Rivera Program Analyst
- Lisa Billups Program Analyst
- Donna Powers Program Analyst
- Antoinette Ross Program Analyst
- Theresa Singleton Program Analyst
- Gretchen Swayzer Program Analyst
- Da’Shia Davis Intern
- Tamikio Bohler Program Analyst, W&I
- Johnnie Beale Senior Tax Analyst, W&I
- Debra Awalt Program Analyst W&I



- Kay Anderson Program Analyst W&I
- Carolyn Sanders-Walsh Program Analyst W&I
- Tonjua Menefee Sr. Tax Analyst C&L
- Robert Rosalia Program Analyst
- Deanna Lewis Program Analyst
- Annie Gold Management Assistant

Members of the Public

None

Welcome, Review Agenda

Susan Jimerson opened the call.

Roll Call

Quorum met.

DFO/National Office Update

Susan Jimerson welcomed everyone to the on the call. Sheila Andrews is out of the office on this week. She will return next week. Jimerson shared the National Office update with the committee. Stacia Jones' detail is over and she will be returning to her position as a TAS Group Manager. She contributed valuable information to the TAP. Appreciation and thank you was expressed to Stacia for a job well done. Fred Smith will be joining the TAP staff behind Stacia. He will start on September 6, 2016. He will take over the Special Projects Committee. There are two additional employees being detailed in to TAP. Deanna Lewis and Robert Rosalia will be joining TAP on September 20, 2016, for a 180 day detail. They will be assigned different tasks to work with a committee within TAP. The next TAP Quarterly Informational session will be on September 29, 2016, at 2 p.m. EST. A special thank you goes to all members who attended the JC Virtual TAP meeting. Interaction with each other was done through WEB-X, which was a very good experience. A lot of positive feedback came from the meeting.

TAP Managers Update

Cedric Jeans added that during the JC meeting, members were asked to provide ideas for proposed projected committee work for next year. He has received one submission back so far. Members are encouraged to get their thoughts in. Chairs are reminded to send their reports in.

TAP Chair Report

Gina Jones welcomed everyone and expressed thank you to Gretchen Cooney for covering for her during last month's JC meeting while she attended the tax forum. The virtual meeting went well and was a very productive meeting. Thank you to everyone who participated for three days. All committee Chairs were reminded that Newsletter Reports are due this Friday. They were also reminded that the Annual Report articles due date is coming up. More information will be coming around the first week of September. Jones cautioned everyone to be mindful of their obligations. If anyone

knows they will not be able to participate on a scheduled call for their committee, they are to let their analyst and committee chair know as soon as possible. It is very important as the TAP year comes to a close to have quorum. Quorum is vital to carry out the business needed and wrap up the TAP year. There is still a lot of work to be done. Members are encouraged to keep up the momentum.

Minutes Approval

July minutes approved with corrections.

TAP Vice-Chair Report – Gretchen Cooney

Gretchen Cooney reported there is a better response now in getting the reports in and on time. She expressed condolences to Sheila Andrews and Felicia Horton.

Members of the Public

None

Project Committee Review/Activities

Taxpayer Communications (TCC), Chair – Jeanne Matthews

Jeanne Matthews reported:

- **Issue 34106, *ITIN Refundable Credit Compliance*** referral was sent to Systemic Advocacy and the Attorney Advisors on July 21, 2016. They are still waiting for a response back.
- **Issue 34108, *Field Exam and Campus Letter*** attachment referral was approved August 25, 2016 full committee call. It will be forwarded to Systemic Advocacy (SA) and Attorney Advisor for comments.

There were two new issues:

- **Issue 32449, *Paying Estimated Taxes Online***. Additional questions were sent to Wage and Investments (W&I). The committee is waiting for a response back.
- **Issue 35038, *Path Act Implementation***, Subcommittee B is beginning work on this issue. A spokesperson from W&I will attend the subcommittee's call.

Jeanne Matthews mentioned a concern with a member being inactive and wanted to know the process in place to address the issue. Susan Jimerson shared there is a process to get members back onboard or resign. A letter will be sent to the member for compliance or if the member is unable to, they have the option to resign.

Tax Forms and Publications, Chair – Dan Halleman

Dan Halleman stated the Tax Forms and Publications committee has not had the opportunity to discuss the next project and get consensus.

- Subcommittee 1 is focusing on the unavailability of forms and publications to the public and the consistency of forms and publications on the website.
- Subcommittee 2 is looking at issues dealing with business concerns.

The estimated timeframe to have proposal completed will be at the October JC meeting.

Special Projects, Chair – Elizabeth Chaney

Liz Chaney stated Special Projects has been working on two issues. There are three committees within Special Projects:

- Committee 1 is has been focusing on using different Internet channels that affect US taxpayers living abroad. They have met with several Subject Matter Experts to learn more on the topic.
- Committee 2 is working on **Issue 31300, Access to E-Services through Access Accounts**. Andrew VanSingel is the Chair of this committee. The committee recommends improving the service.
- Committee 3 is looking at **Issue 34929, International Citizens Living Abroad**. Update streamline filing compliance procedures information found on the website. The committee wants to make sure the information on the websites summarizes clearly to taxpayers. They will present to the full committee on September 6, 2016 for review.

Jeanne Matthews suggested add a line to Issue 31300 to identify the Program Owner and Exhibit 1 should be identified and referred to on the report. This could be entered under the background research and analysis section.

Decision: Consensus to send back to committee to resubmit for reconsideration.

Taxpayer Assistance Center Improvements, Chair – Kent Christensen

Kent Christensen reported:

- Subcommittee 1 is working on Employment Exceptions. They have developed a survey going out to managers of Taxpayer Assistance Centers. The recommendation will be compiled from the information received. This will be used to complete their referral.
- Subcommittee 2 is in the process of writing a referral. They anticipate having a referral to the JC by the end of September. Their subcommittee will meet tomorrow.

Kent Christensen stated their committee is losing another member totaling three members since the beginning of the year. A solicitation was sent to the members of the committee to volunteer for Vice-Chair. He anticipates the vote to occur during their next meeting.

Notices and Correspondence, Chair – John Slough

John Slough stated the committee has been extremely active for the last couple of months.

- Issue 34179 will be presented during this call
- Two referrals for Issues 30197 and Issue 17399 have been sent to the SA and Attorney Advisor.

Sally Mullins Thompson presented Issue 34179 to the Joint Committee. She explained in detail how the Notices and Correspondence Committee was asked by Small Business/Self-Employed (SB/SE) to look at three letter templates sent to business owners. They were asked to examine the templates effectiveness and make any recommendations that would improve clarity for the taxpayers.

Decision: Consensus referral and Exhibits sent back to committee for corrections and consistency usage throughout the entire referral. Susan Jimerson added the CAWR is for Combined Annual Wage Report.

Toll-Free Lines, Chair – Sean McPhilamy

Joan Ogden stated the Activity Reports are up to date and the committee is doing great work. She is busy collating the model for footnotes for the Government Printing Office (GPO). The committee is also working on a public service referral dealing with taxpayers being able to hear a public service announcement rather than music.

Internal Communications, Chair – Dan Halleman

Dan Halleman stated Internal Communications Committee is in the process of standardizing the information needed for the Member Handbook, Chapter 11. Success Stories is the current title. The committee believes it gets confused with the tab on www.TAPSpace.org success stories by individual members. The committee is looking to change the wording to say Success Stories Members Can Use in Outreach Situations of what TAP has accomplished within the last three years. Dan reminded the members that articles for the newsletter are due.

Roundtable Discussion

None

Closing

Susan Jimerson thanked everyone for participation on the call.

**Next meeting: September 28, 2016
1 p.m. EST; Noon CST; 11 a.m. MT; 10 a.m. PST**

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

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
July 27, 2016**

Designated Federal Official (DFO)

- Sheila Andrews TAP Director

Members Present

- Gretchen Cooney National TAP Vice-Chair
- Jeanne Matthews Chair, Taxpayer Communications Project Committee
- Dan Halleman Acting Chair, Tax Forms and Publications
- Richard “Kent” Christensen Chair, Taxpayer Assistance Center (TAC) Improvements Project Committee
- Dan Halleman Internal Communications Committee
- Joan Ogden Vice-Chair, Toll-Free Phone Line Project Committee
- Gary Hoff Vice-Chair, Taxpayer Communications Project Committee
- David Jones Member, Toll-Free Phone Line Project Committee

Members Absent

- Gina Jones National TAP Chair
- John Slough Chair, Notices and Correspondence Project Committee
- Sean McPhilamy Chair, Toll-Free Phone Line Project Committee
- Elizabeth “Liz” Chaney Chair, Special Projects Committee
- Mary Kautzman Chair, Tax Forms and Publications

Staff

- Susan Jimerson Chief, TAP West
- Cedric Jeans Chief, TAP East
- Kim Vinci Sr. Program Analyst
- Linda Rivera Sr. Program Analyst
- Lisa Billups Sr. Program Analyst
- Otis Simpson Program Analyst
- Gretchen Swayzer Program Analyst
- Stacia Jones Program Analyst
- Priscilla Medrano Program Analyst
- Da’Shia Davis Intern
- Tamikio Bohler Program Analyst, W&I
- Johnnie Beale Senior Tax Analyst, W&I
- Debra Awalt Program Analyst W&I
- Kay Anderson Program Analyst W&I
- Tonjua Menefee Sr. Tax Analyst C&L

- Kevin Brown Management Assistant

Members of the Public

None

Welcome, Review Agenda

Gretchen Cooney opened the call.

Roll Call

Quorum met.

DFO/National Office Update

Sheila Andrews thanked everyone for all that they do and she encouraged all chairs to be on the call or make preparations for coverage to maintain quorum. Andrews reminded everyone that tomorrow, July 28, 2016, at 2 p.m. EST will be the All TAP virtual meeting. All chairs will be reporting out to the Panel what each committee is working on. Andrews will send an agenda to the chairs prior to the meeting. The National Taxpayer Advocate released the June Report to Congress which includes feedback received from forums which TAP has been involved in.

TAP Managers Update

Cedric Jeans reported that Dan Halleman is the Acting Committee Chair for the Tax Forms and Publications Project Committee.

TAP Chair Report

N/A

Minutes Approval

June minutes approved as presented.

TAP Vice-Chair Report – Gretchen Cooney

Cooney reported that outreach is getting better. Cooney reported that the Outreach Committee has developed a brochure for virtual outreach ideas and it should be completed very soon.

Project Committee Review/Activities

Taxpayer Communications (TCC), Chair – Jeanne Matthews

Mathews reported that both subcommittees are working on issues. Subcommittee A had its issue approved by committee which is currently being reviewed by attorney advisors and hopes to be ready for the August meeting. Subcommittee B has an issue that is back from quality review and will be reviewed by the committee in August. It will hopefully be to JC within the next two months. Matthews mentioned that additional information has been requested for an issue with screening the committee.

Tax Forms and Publications, Chair – Dan Halleman

Issue 33916 Form 7004 and Instructions:

Halleman reported that Issue #2 clarifies the actual date received with respect to both electronic and mailing date received.

Gretchen Cooney made the following suggestions for consistency and punctuality:

1. Add a period after the Reason/Comments section for item number one.
2. Add quotes to the suggested wording for item number two starting with, "Generally, Form 7004..."
3. Item number eight within the Change section the "Complete Part 1..." should be Roman numeral I instead of the number 1.

Recommendations were made with changes discussed to approve the referral by Jeanne Matthews then seconded by Kent Christensen.

Action: Referral approved for elevation with the suggested changes.

Issue #34065 – Publication 523

The following changes were suggested to this referral:

1. Titles are to be eliminated from the referral.
2. Number 7 in the Reasons/Comments section the word "as" is replaced by "and" to read, "To provide clarity and meaning of terms **and** to understand when they are being used."
3. Number 8 under the Reason/Comments section one period should be removed from the first sentence.
4. Number 9 under the Reason/Comments section the word "focusing" will be replaced by the word "focus."
5. Number 12 under the Reason/Comments section the first sentence should read, "Provide definitions of such words such as 'business' or 'homes' so that the taxpayer has a clear understanding of whether the home has ever been used as a business."
6. Number 14 under the Change to section it should read, "After completing Form 8949, report the amount of gain or loss on Schedule D (1040)."
7. Number 16 under the Reason/Comments section, the sentence should read, "...Form 5405 indicating the exception. For all taxpayers who still owe must pay or seek an exception."

Flowchart

Dan Halleman suggested letting the IRS review the Appendix A and see what their response is to this.

Jeanne Matthews suggested adding the word "of" to the last rectangle on the bottom left to read, "You used the space as residence space for 2 years out **of** the 5 years leading up the sale."

Recommendations were made with changes discussed to approve the referral by Jeanne Matthews then seconded by Joan Ogden.



Action: Referral approved for elevation with the suggested changes.

Special Projects, Chair – Elizabeth Chaney

None

Taxpayer Assistance Center Improvements, Chair – Kent Christensen

Christensen reported that Subcommittee 1 is working on a recommendation of expedited service for simple procedures that do not require appointments. They have developed a list of survey questions currently being reviewed by Wage & Investments (W&I). This will be used to complete their referral. Christensen also reported that Subcommittee 2 is finalizing the template letter that will be sent to colleges/universities to help students get what they need for their financial aid applications. This will be in a format that allows colleges/universities to print on their own letterhead for their students. The subcommittee hopes to have it ready very soon.

Notices and Correspondence, Chair – John Slough

None

Toll-Free Lines, Chair – Sean McPhilamy

Joan Ogden reported that Subcommittee 1 is currently evaluating Gina Jones' recommendations to their referral.

Internal Communications, Chair – Dan Halleman

Susan Jimerson reported they are working TAP's newsletter and having challenges getting articles from chairs for the newsletter. Other options are being considered by the committee to resolve this issue. Jimerson reported that one suggestion would be the chair delegating this assignment to other members or changing the format of the newsletter.

The committee is also working on changing the Facebook administrator which they are currently trying to resolve. Joan Ogden and Kent Christensen reported that several articles have been submitted timely, but not included in the newsletter. Jimerson will take this back to the committee to be addressed.

Roundtable Discussion

None

Closing

Gretchen Cooney thanked everyone for participation on the call and reminded everyone of the next meeting which is going to be held virtually.

Next meeting: August 16-19, 2016

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

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
June 29, 2016**

Designated Federal Official (DFO)

- Sheila Andrews TAP Director

Members Present

- Gina Jones National TAP Chair
- Jeanne Matthews Chair, Taxpayer Communications Project Committee
- Mary Kautzman Chair, Tax Forms and Publications
- John Slough Chair, Notices and Correspondence Project Committee
- Richard "Kent" Christensen Chair, Taxpayer Assistance Center (TAC) Improvements Project Committee
- Dan Halleman Internal Communications Committee
- Joan Ogden Vice-Chair, Toll Free Phone Line Project Committee

Members Absent

- Gretchen Cooney National TAP Vice-Chair
- Sean McPhilamy Chair, Toll Free Phone Line Project Committee
- Elizabeth "Liz" Chaney Chair, Special Projects Committee

Staff

- Susan Jimerson Chief, TAP West
- Cedric Jeans Chief, TAP East
- Kim Vinci Sr. Program Analyst
- Linda Rivera Sr. Program Analyst
- Antoinette "Toni" Ross Program Analyst
- Gretchen Swayzer Program Analyst
- Stacia Jones Program Analyst
- Priscilla Medrano Program Analyst
- Da'Shia Davis Intern
- Tamikio Bohler Program Analyst, W&I
- Johnnie Beale Senior Tax Analyst, W&I
- Carolyn Sanders-Walsh Senior Tax Analyst
- Kevin Brown Management Assistant

Members of the Public

None

Welcome, Review Agenda

Gina Jones welcomed everyone to the call and officially opened the meeting.



Roll Call

Quorum met.

DFO/National Office Update

Sheila Andrews reported that we are in the interview phase of the recruitment process and things are going well. Andrews thanked those members who are helping with the interviews as it brings a different perspective to those seeking to be part of TAP.

Andrews continued, once this process has been completed the staff will present their recommendations to me, I will forward them to Kim Stewart, Executive Director of Systemic Advocacy, then on to Nina Olsen, the National Taxpayer Advocate (NTA), to the Commissioner of IRS and finally to the Department of Treasury. Andrews also reminded the Panel of the informational meeting taking place tomorrow, June 30, 2016, at 2 p.m. EST. It is regarding what happens when you owe money to the IRS.

Andrews introduced a summer intern, Da'Shia Davis, to the committee. Her main project will be verifying the implementation of the referrals that the IRS agreed to.

TAP Managers Update

Susan Jimerson reported that a couple of referrals are in quality review, another referral is with the Attorney Advisors for review. We have lost a couple of members over the last month and we are determining if there are alternates to fill these vacancies. Jimerson reminded the committee that their analysts are there to assist them. Please let them know by phone or email if assistance is needed to get what is needed for any of the meetings.

Cedric Jeans reported that Brooks White, from New York, recently resigned and we are currently unable to fill this vacancy. Jeans mentioned that as soon as the Speak-Up Brochure becomes available, the committee will be notified. Jeans also reported that we are working on obtaining badges for committee members who need them.

Donna Powers added that she had quite a few of the older brochures that are available right now if any member needs any immediately.

TAP Chair Report

Gina Jones congratulated the committee for elevating the referral, Issue #33524, from the Toll Free committee with a few minor changes. The change was regarding level of service, which ended up being 38 percent to 80 percent with a footnote.

Jones reminded the committee of the virtual JC meeting on August 16, 2016 to August 19, 2016. There will be two hour calls in the morning at 10:30 a.m.-12:30 p.m. EST and then the afternoon at 2:30-4:30 p.m. EST, and Friday will be the optional day if needed. Due to the meetings being virtual, and there being no travel costs, both Chairs and Vice-Chairs are being invited to these meetings.

Jones reminded the committee that each chairperson should be working on their annual reports needed by the end of the TAP year, November 30, 2016. These will be a review of what each committee accomplished and have planned for next year.

Minutes Approval

May 25, 2016 minutes approved with corrections to show:

- Kent Christensen corrected page five for the TAC committee to show subcommittee 1 is working on closed circuit “TV” instead of “tax.”
- Christensen also changed the next line to read that a thumb drive is being “proposed” not “used.”
- Stacia Jones corrected the words “que” under Toll Free Line committee to read “queue” for both words.

Action: The May 25, 2016 minutes approved as corrected.

TAP Vice-Chair Report – Gretchen Cooney

Jones reminded everyone to complete their activity reports.

Public Comments

None

Project Committee Review/Activities

Taxpayer Communications (TCC), Chair – Jeanne Matthews

Matthews reported that their new member, Victor Frausto, is really fitting into the committee and working out well. Matthews reported that another member did resign and she is not sure if there will be a replacement for her. Gary Hoff is now the new committee Vice-Chair. Matthews mentioned they are working on one referral, Issue 34106, *ITIN Refundable Credits*, which is currently being worked and will hopefully be ready for the JC in the next couple months.

Tax Forms and Publications, Chair – Mary Kautzman

Kautzman reported that her committee made the recommended corrections for the referral that will be heard by the JC today and that her committee screened numerous issues and was able to come up with their final projects for the year.

Issue #33916, Form 7004 and Instructions:

- Gina Jones recommended numbering the 13 referrals so they are more easily identifiable.
- Jones recommended that referral number two include, “Specify whether ‘must be filed’ means postmarked or received by the IRS for returns filed by mail, or e-filed or acknowledged by the IRS for returns electronically filed.”

Action: Mary Kautzman requested that Gina Jones send an email with this correction so the changes can be captured accurately.

- Jones recommended referral number 3 read: Page 1 Col 1 Termination of Extension and delete “and Extension Period.” Jones also recommended the Reason/Comments to say: Delete the paragraph and include the wording: “An extension period topic and then (See recommendation number 4).”

Action: Mary Kautzman will work on additional ways to write this and include it when the referral is sent back to the committee.

- Jones recommended changing number 4 reference to: Page 1 Col. 2 Termination of Extension Period, if the above recommended change occurs.
- Jones recommended adding the following to the Change section for number 4: “Change existing paragraph to...” at the beginning of the sentence.
- Jones recommended adding, “Change existing paragraph to...” for referrals number 5 and 6 then put that in parenthesis.

John Slough questioned how effective quality review is with the need for so many changes and highlighted how important this process is.

Jones mentioned that there should always be specific barriers listed as there is always a cost associated with revising a form. This referral should include cost as a barrier and the benefits would be the clarity that hopefully outweighs the costs. Jones continued with including a note in there to connect it to the Taxpayer Bill of Rights (TBOR). Jones mentioned that this referral is included in the first Bill of Rights, “To Be Informed.”

Actions:

1. Referral will be sent back to the committee for recommended corrections.
2. Gina Jones will send an email to Mary Kautzman with all changes discussed today.

Special Projects, Chair – Elizabeth Chaney

Stacia Jones reported that Issue #31300 the availability of transcripts to practitioners with Power of Attorney on accounts that have ID Theft indicators will be going to the Attorney Advisors. The International Subcommittee is still working on an issue with taxpayers residing overseas who have problems securing an identification number. Subcommittee 3 is still screening possible issues.

Jeanne Matthews introduced a flowchart, and a narrative, that shows how you work an issue and thought it might be good to send to all of the chairs as a reference. Jones added that it should be sent to all Panel members.

Action: Jeanne Matthews will send this to Jones to be disseminated to the entire Panel.

Taxpayer Assistance Center Improvements, Chair – Kent Christensen

Kent Christensen reported that after speaking with Karin Rice about the Closed Circuit TV, they decided to drop the issue. The committee is now focusing on the business hours of the TACs. The non-appointment TACs are stopping walk-ins very early in the

day, sometimes before noon. The committee will start this process with a survey from a TAC manager from last year to come up with a recommendation.

Christensen continued that the other committee is working on acceptance of tax transcripts for students applying for Free Application for Federal Student Aid (FAFSA). Christensen mentioned the universities have a lot of misunderstandings about the process and they are expecting too much from the students. They are also not giving the students enough time to get the documents in.

In response, the committee is working on a recommendation for a flyer that could be given to the universities that could be put out on their own letterhead explaining how to get the transcripts necessary for their applications. Christensen hopes this will keep the students out of the TACs and able to quickly access their information. Christensen expects one or two referrals very soon as a result of their work.

Notices and Correspondence, Chair – John Slough

John Slough mentioned that both subcommittees are working on referrals at this time. The Fair and Just subcommittee are reworking an issue currently. The Be Informed subcommittee had three referrals at the final stages and almost ready for the quality review subcommittee. These issues were the 99B, the 99C and 2057 notices and are the notices sent by the IRS to be reviewed. Slough reported that they may have four issues next month if they are able to get through Quality Review.

Gina Jones reminded the committee that any referral is required to be on the current project referral form and in proper format. This is on the TAP Facebook page according to Jones. In addition, the Quality Review team should be making sure this is done before referrals are sent to the JC.

Toll Free Lines, Chair – Sean McPhilamy

Joan Ogden, the committee Vice-Chair, reported that the committee is making significant progress on Public Service Announcements (PSAs) to be played while taxpayers are on hold on toll-free phone lines. The committee is also evaluating taxpayers scheduling in-office meetings at TACs and having the PSA played while taxpayers are on hold. The entire committee will review this during the next meeting.

Ogden reported on Issue #33490, *Authentication Retention (AR) Technology*, regarding the proposed changes from last month's meeting. The purpose of this referral is to allow tax payers to authenticate their identity one time per call instead of having to do this multiple times on the same call.

Gina Jones questioned the process of footnotes and how they appear on the referral. Ogden explained that the process is acceptable according to the Style Guide for referencing a source multiple times in a single document.

Jones asked for clarity on the two proposed solutions. Jones also corrected the PII to read as, *Personally Identifiable Information*. Jones recommended the "Proposed

Solution” section to read: “to develop and implement a standard and secure means for customer service representatives (CSRs) to authenticate a taxpayer’s Personally Identifiable Information. The second would be to use the authentication retention technology to securely transfer the information between the CSRs.”

Ogden explained that the purpose of this referral is to improve an existing standard instead of developing a new one. Linda Rivera further explained the full purpose of the referral to use the existing standards and technology for a taxpayer to have to authenticate their PII only once to reduce or eliminate frustration for the taxpayer.

Gina Jones inquired about the last sentence on the first page saying, “The taxpayer retains the right to speak with a CSR when there is a technological challenge.” This was explained to mean that if something happened with the authentication process, a taxpayer should be able to remain on the call instead of having to call back in a second time. Jones requested to have this sentence rephrased to be easier to understand.

John Slough brought up an additional issue that may be worked at a different time. Slough will send the topic to Rivera.

- Jones recommended that the proposed solutions be short, clear and concise.
- In addition, Jones recommended the additional information in this section be moved into the background, research and analysis section.
- Jones will email Linda Rivera and Joan Ogden proposed wording.

Action: PII to be changed to Personally Identifiable Information

Action Item: This referral will be sent back to the committee for the suggested changes

Internal Communications, Chair – Dan Halleman

Halleman reported the committee is working to get the Facebook permissions from former member Suze Kanack. Halleman also sent a friendly reminder that input is required from all of the Chairs by this weekend if possible for the newsletter.

Roundtable Discussion

N/A

Closing

Jones thanked everyone for being on the call and officially closed the meeting.

**Next meeting: July 27, 2016
1 p.m. EST; Noon CST; 11 a.m. MT; 10 a.m. PST**

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

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
May 25, 2016**

Designated Federal Official (DFO)

- Sheila Andrews TAP Director

Members Present

- Gina Jones National TAP Chair
- Gretchen Cooney National TAP Vice-Chair
- Jeanne Matthews Chair, Taxpayer Communications Project Committee
- Sean McPhilamy Chair, Toll Free Phone Line Project Committee
- Elizabeth "Liz" Chaney Chair, Special Projects Committee
- Mary Kautzman Chair, Tax Forms and Publications
- John Slough Chair, Notices and Correspondence Project Committee
- Richard "Kent" Christensen Chair, Taxpayer Assistance Center (TAC) Improvements Project Committee

Staff

- Susan Jimerson Chief, TAP West
- Linda Rivera Program Analyst
- Toni Ross Program Analyst
- Gretchen Swayzer Program Analyst
- Lisa Billups Program Analyst
- Stacia Jones Program Analyst
- Kim Vinci Program Analyst
- Brienne Wilner Senior Tax Analyst
- Tamikio Bohler Program Analyst, W&I
- Johnnie Beale Senior Tax Analyst, W&I
- Deana Johnson LTA, Northern Kentucky
- Betty Scott Program Analyst, W&I
- Annie Gold Management Assistant

Members of the Public

None

Welcome, Review Agenda

Gina Jones welcomed everyone to the call and officially opened the meeting.

DFO/National Office Update

Sheila Andrews reminded the Joint Committee that Nina Olson will be speaking to TAP staff and members about the Future State, on Thursday, May 26, 2016, at 2 p.m. EST. There will be a reminder sent out this afternoon.



Gretchen Swayzer has joined the TAP staff. Priscilla Medrano has also joined the TAP staff and will be assisting with recruitment.

An email was sent out that contains the press release to the 2015 Annual Report to Congress. Nina Olson wants to make sure taxpayer's rights are protected and that they are receiving the services they need.

TAP staff is working on the Virtual Joint Committee Meeting. More information will be provided in future JC meetings.

Roll Call

Quorum met.

TAP Managers Update

Susan Jimerson informed the committee that Theresa Singleton will be out of the office for the next month on leave. Toni Ross will be covering for Theresa while she is away. She will be taking over all of the duties that Theresa would normally be responsible for regarding the Notices and Correspondence committee. Members are advised to watch for emails coming from Ross on behalf of Theresa. Ross and Jimerson will be filling in for the Annual Report. Gina Jones wishes for a speedy recovery for Theresa, on behalf of the Joint Committee.

There are two members who have expressed their desire to resign from the TAP. One has officially resigned and the other one has been contacted to make sure this is still their intention. An alternate is currently being trained to come aboard to replace the member who has already resigned.

Cedric Jeans is in training and his report will be shared during the next month's meeting.

TAP Chair Report

Gina Jones stated that an email reminder went out to everyone stating the activity reports are due today. Chair reports are due by the first Friday of the month. The next report is due June 3, 2016.

The TAP Leadership call was held this morning and is scheduled for the third Wednesday of each month. It was a good meeting. There is no set agenda for the meetings. They are held to see if there are any issues with the committees or sub committees or concerns that need to be addressed. It is an informal call to update the status on where everyone is in their committees.

Members are encouraged to participate in the call with the National Taxpayer Advocate that is scheduled for tomorrow, May 26, 2016, from 2-3 p.m. EST. She will be discussing the Future State.

Minutes Approval

March 30, 2016 minutes approved with corrections to show:

- Under TCC reports in the sixth line, Screening Committee meets instead of Sub Committee.
- Under Special Projects, number one should say the International requirements for temporary Social Security numbers for Taxpayers living abroad.
- Under number two on Special Projects, POA cannot get access if Taxpayer has ITIN.

Liz Chaney will send exact wording to Kim Vinci to update.

April 27, 2016 minutes approved as submitted.

TAP Vice-Chair Report – Gretchen Cooney

Cooney stated they met last week regarding outreach and had a good meeting. Discussions were held regarding ways to get members the information they need to be involved in outreach activities and to share any success stories. Each chair will provide Cooney with information on stories that will be shared in the TAP newsletter. There are a couple of stories from the Toll Free committee that will be shared. Outreach report participation has been good. Follow-up efforts are being done to help everyone stay current getting the reports turned in.

Jones inquired about the Future State Forum that Gretchen Cooney attended. Cooney added she was excited to attend. Nina Olson was in Red Oak, IA. It is a small town and there was good attendance of sixty to seventy-five people. Most of them were Practitioners. There were people participating in the forum to help with legal aide. One gentleman has been a farmer for fifty plus years and he still does his own tax returns. He did a presentation. Cooney encouraged members that if the opportunity presents itself, try to attend one of the forums presented by Nina Olson. It is very informative and Nina Olson interacts with the taxpayers and is a good listener. Cooney stated she was asked to speak and share some information about TAP. The interest is out there to make TAP work. Jones expressed her appreciation to Gretchen Cooney for attending and reporting back to the Joint Committee.

Public Comments

None

Project Committee Review/Activities

Taxpayer Communications (TCC), Chair – Jeanne Matthews

Matthews stated the committee was going through a rocky start. The Vice-Chair resigned. An alternate is being brought on to replace him. The election could not be done during the last call due to a glitch with the conference line. There were members that dropped off the call due to issues connecting. The committee agreed to hold off until next month for the election of a vice-chair. Toni Ross sent out an email with the responsibilities of the vice-chair and encouraged members to take the position. Jimerson is assisting Matthews in contacting a member to see if interest is still there. There are some conflicting stories on the member's interest.

There were a couple of issues that came back. A response was received back from IRS on two proposed recommendations that were not submitted on the original referral for Form 433F, Collection Information referral. One proposal was accepted to make the form areas formatted a little better. Some of the formatting changes will be implemented in February, 2017. The second recommendation was to create a more simplified form for taxpayers. A fourth 433F-EZ would be easier and less of a burden for taxpayers. The IRS rejected it and stated it is a duplicate form. They will not change their mind on this. There is one referral from last year that is still pending. 32780, the Interactive Tax Assistant, the committee is still waiting for a response back.

Subcommittee A is getting ready to draft their referral for the ITIN Compliance issue. Subcommittee B is working on Field and Exam campus attachment to letters. They are working on their referral.

Action Item: Kim Vinci will follow up on Issue 26834, Itemized Deduction Link for status.

Tax Forms and Publications, Chair – Mary Kautzman

Kautzman updated the JC on **Issue # 33916, Form 7004 and Instructions**. This was an assignment from IRS to review and provide comments. This was the first project started at the face to face meeting. Some changes were made and voted on. The committee discussed the recommendations being worked:

- Deleting a line, repetition out of place and doesn't apply.
- Request for clarification of must be filed by post mark received by IRS.
- Combining the two sections and moving to a different section.
- The determination of the extension period, rewording.
- Exceptions, lines two and four
- Adding a caution box
- Changing the sentence to less words for clarity
- Make a change on form code entry on line 1A
- Change to use the name on last tax return filed
- Change employer ID number to Social Security number
- Change of should to must
- Change back side of request for extension
- Change the note file request for extension sort verses granted
- Benefits and barriers impact and change, list benefits

Kautzman stated the Screening Committee is looking at revising the format on the issue into one line.

Action Item: Mary Kautzman will revise with changes and bring back to the Joint Committee for approval next month. Sheila suggested finding Bill of Rights to associate will help.

Special Projects, Chair – Elizabeth Chaney

Elizabeth Chaney stated the committee does not have any updates at this time.

Taxpayer Assistance Center Improvements, Chair – Kent Christensen

Christensen reported the committee is made up of two subcommittees:

- Subcommittee 1 is working on the closed circuit TV. After speaking with the Subject Matter Expert (SME) during the last meeting, a thumb drive is being proposed. The committee is looking towards getting bigger hard drives but there are issues there. They are looking at ways to get the taxpayers to view the instructional videos on the internet prior to getting to the TAC.
- Subcommittee 2 is working “Acceptance of Tax Transcripts”. A SME will attend their next meeting.

Notices and Correspondence, Chair – John Slough

Slough stated the committee had a meeting prior to this meeting. There are two subcommittees, “Fair and Just” and “Be Informed”. Both are working on referrals. They should be ready in the next couple of weeks. Members are working diligently.

Toll Free Lines, Chair – Sean McPhilamy

McPhilamy stated the committee was able to find information on the call back retention. In 2009, there were different requests for appropriations. The IRS had to implement technology solutions within the toll free system for multiple individual and business lines. Both affect the design and implementation for the build out. The IRS is going forward for the next stage of technology.

McPhilamy requested JC approval to elevate **Issue #33524, Toll Free Phone Line Customer Callback (CC) Technology**, to IRS.

- Customer call back technology – if acceptable, move to proposed solutions.
 - Variations in wait time associated with different work loads
 - Association of time of year and variation of calls. The goal is to develop staffing needs per the requirements
- Call variation and wait time – using more accurate wait time and estimates.
- Announce the caller’s position in the queue.
- Announce changes to the queue.
- Fix and develop design for customer call back quality.
- Permitting call to reach call back after hours.
-

Johnny Beale stated this capability has been requested in the 2016 IRS budget. The IRS budget has not been approved. The callback capability was requested several years back. Congress has not acted on the IRS’ request.

Action Item: Committee will place footnote behind first bullet point and behind the 38 to 65 percent stating where information came from.

Decision: Consensus to move forward to IRS.

Issue 33490, *Authentication Retention* – When a caller confirms identity with IRS on Toll Free line, there is no retention of the information during any time of the transfer. The multiple references in the Inspector General’s report identify the goal to utilize authentication and retention.

Beale stated these are two separate technologies that IRS has already requested in the budget process.

Action Item: Committee to move proposed solution under the goals statement and revisit the project statement.

Internal Communications, Chair – Dan Halleman

Billups reported Dan Halleman is the new Chair for Internal Communications. Halleman could not attend this call due to travel according to Billups. The TAP newsletter was published and has been posted onto TAPSpace. If anyone has feedback or suggestions, forward to Dan Halleman. There has been some positive feedback received. Work is being done on the guidance to the Newsletter. Management will be reviewing for additional content. The next Newsletter is projected to go out early next month. Chairs are asked to provide information to the committee analysts by the first Friday of each month. This will allow the release of the newsletter early in the month.

Roundtable Discussion

No discussions.

Closing

Gina Jones thanked everyone for being on the call and officially closed the meeting.

**Next meeting: June 29, 2016
1 p.m. EST; Noon CST; 11 a.m. MT; 10 a.m. PST**

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

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
April 27, 2016**

Designated Federal Official (DFO)

- Sheila Andrews TAP Director

Members Present

- Gina Jones National TAP Chair
- Gretchen Cooney National TAP Vice-Chair
- Jeanne Matthews Chair, Taxpayer Communications Project Committee
- TBD Chair, Internal Communications Committee
- Sean McPhilamy Chair, Toll-Free Phone Line Project Committee
- Elizabeth Chaney Chair, Special Projects Committee
- John Slough Chair, Notices and Correspondence Project Committee
- Richard "Kent" Christensen Chair, Taxpayer Assistance Center (TAC) Improvements Project Committee

Staff Present

- Susan Jimerson Chief, TAP West
- Cedric Jeans Chief, TAP East
- Otis Simpson Program Analyst
- Toni Ross Program Analyst
- Stacia Jones Program Analyst
- Carolyn Sanders-Walsh Senior Tax Analyst
- Tamikio Bohler Program Analyst, W&I
- Karin Rice Public Affairs Specialist
- Deana Johnson Northern Kentucky LTA
- Kevin A. Brown Management Assistant

Members of the Public

None

Welcome, Review Agenda

Gina Jones reported that today's meeting will be closed due to an issue with the federal register notices so no formal actions or decisions will take place today.

DFO/National Office Update/Susan National Office Report

Sheila Andrews thanks all volunteers in the committee for National Volunteer Appreciation Week. Andrews also mentioned that today is National Administrative Professional Day. The Recruitment period has started and we have 428 applications so far. Any states with less than eight applications will require additional marketing efforts have be taken to get more participation.



Tomorrow is the all TAP virtual meeting, please have all committee represented. The Future State meeting will be on May 10, 2016. TAP was included in this brief presentation then question and answers will follow. An FAQ will follow if time runs out.

Roll Call

Quorum met.

TAP Managers Update

Susan Jimerson reported that Collette Keeton, of the Special Projects Committee, is participating in a feedback session on ACA products and Penny Doak is her backup. Notices collection notices resign project and are working on it now. The Notices and Correspondence committee will be working on a collection notices redesign project with Systemic Advocacy (SA). Jimerson reported that they are working on their first set of notices to review. The committee will have a feedback discussion with the SA group next week. Jimerson reported the following changes: Lisa Billups will work with the Internal Communications Committee; Stacia Jones will work the Special Project Committee from Kim Vinci. Annual Report- 2014 was delivered to headquarters on Monday or Tuesday and they have been put in the mail. The 2015 Annual Report is almost wrapped as well.

Cedric Jeans sent the survey for Face-to-Face meeting and it closed last Friday with only 15 replies. Will reopen until May 15, 2016 but we need more responses from participants. The Tax Forums locations and dates will be added to www.TAPSpace.org, we will solicit for member participations soon. Jackie Baily, from South Carolina, resigned and was replaced by Julianna Weeks. We will bring her on board this week or next week.

TAP Chair Report

Jones reported that we are working on getting annual report done in a more timely fashion. June is the anticipated date for 2015 and December 2016 is the anticipated date for 2016. Jones reported that Chairs will do project committee reports for the annual report. These reports will include a summary of committee activities; pending issues; pending proposals; or items also. Contact analyst if assistance is needed. Jones reported that the normal committee report includes recommendations and reports is still going to be needed for the annual JC meeting for August, which will be held virtually. This is for review of year and planning for next year for each committee. Tentatively we are looking at the week of August 15, 2016, but this is still being worked out. Jones is looking for feedback on what the format should be for these meetings. They can be four days of 2 hour sessions, two hours twice a day for two to three days, three days of three hours virtually and by video. The details are still being worked. If the chair cannot attend, plan for the Vice-Chair to attend these meetings.

Andrews added what is needed for this meeting: status of the entire year is reported, parking lot issues are discussed also, and planning for the next year is done also. These proposals are shared with NTA, EDSA and other IRS departments to know what direction the committees want to go in. We also receive direction from the IRS for what



they want us to do as well. This is so we know what direction the committees are going in at the beginning of the TAP year.

Gretchen Cooney reported Internal Communications Committee did not meet due to a miscommunication, but there was a reminder to use the new outreach form for the monthly reports. There is a public tax forum in Red Oak, Iowa that the NTA and Senator Chuck Grassley will be attending. Cooney will be at this Forum representing TAP. Andrews will let the NTA's communication office know that TAP will be represented. Jones reported that she attended and testified at a Tax Form in Washington, D.C. and Andrew VanSingel attended and spoke at a Tax Form in Chicago a while back.

Jones reminded the chairs to gear your reports for tomorrow to the entire Panel so it will not seem repetitive because this is to allow all TAP members to know what the entire TAP committee is working on.

Public Comments

None

Project Committee Review/Activities

Taxpayer Communications (TCC), Chair – Jeanne Matthews

Matthews stated the committee review IRS' response to last year referrals, nothing could be added so responses were accepted. There is still one referral pending a response and we should get that one back in May. Issue 32775 Form 433F had some rejections on it due to cost and the accepted referrals will be implemented in February of 2017. Issue 31082 part 1. Scanning process was rejected due to process already in place. The Interactive Tax Assistant (ITA) was recently sent to IRS and is awaiting a response. Issue 32776 Improve the Schedule C brochure created to reach potential sole proprietors was approved and will be implemented in June of 2016. Subcommittee A is working the Individual Tax Identification Number and Refundable Credits issues. They are gathering information and questions for experts to answer. Subcommittee B working on Field Exam and Campus attachment to letters. Screening committee reviewed list, due to various reasons issues were dropped with two going to the parking lot to be worked later.

Missing calls and outreach reports was also discussed.

Tax Forms and Publications, Chair – Mary Kautzman

Mary Kautzman reported the committee working on Form 7004 and instructions. They have a draft that is being finalized and will be voted on in May meeting. Publication 523 *Selling Your Home* being worked. The committee is still in this review process since it is a large publication; the status will be available after next week. They have two focus groups ongoing for Form 8962 *Premiums Tax Credit* and the Shared Responsibility Payment and the committee is still working on these. Kautzman reported that Outreach is good with members going to Tax Forums and Congressional Liaison meetings.

Special Projects, Chair – Elizabeth Chaney

Elizabeth Chaney reported the committee has three subcommittees but may only need two. This subcommittee works International issues where they have learned that the IRS is making headways working issues for international taxpayers. One of the main issues for this group is temporary social security numbers issued by the IRS and how citizens can make estimated tax payments. The second group is E-service Transcripts subcommittee and they are addressing Issue 31300 Practitioners whose clients have an ID Theft pin number and an active Power of Attorney document on file can't get the information sent directly to the practitioner causing delays in processing their taxes. The third group is looking at the reactivation of the online Power of Attorney services for practitioners Issue 29423. The IRS is working to get the system back but there is no funding for the next two years for this program. The issue will be closed and member notified.

The committee has been working several different outreach projects. Chaney reported that the committee has lost two members, Francesca Hary and Merry Mattson, who have not been replaced at this time.

Taxpayer Assistance Center Improvements, Chair – Kent Christensen

Christensen reported the committee has started reviewing about 180 videos that are reported to be from the IRS. Their question is how is how will the IRS be using these videos in the future to educate taxpayers. In addition, the IRS will be directing taxpayers to the Hate to Wait brochure, which this committee developed last year, and to other publications by this committee. This is being seen as a success for the committee. The IRS is printing this document and is providing a link online to provide quick access to this information in October of this year.

Christensen reports that they are reviewing the IRS response to several referrals, some rejected and others have been partially accepted. These will be reviewed before the next Joint Committee meeting. The committee is also gathering information on the acceptance of transcripts by universities. The committee is also receiving information about the Department of Education's Prior Year and Early Submission Concepts that were announced last September. The subcommittee has also requested a Subject Matter Expert (SME) to discuss the training and support for the new TaxSlayer software program that will be used in the Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) clinics.

Christensen reported that subcommittee attendance is great, but the full committee was not very good. He will remind the committee of the important of regular attendance for the committee and its overall mission. Christensen will be reviewing VITA training materials and will be seeking one more person to assist with this project.

Notices and Correspondence, Chair – John Slough

John Slough reported that they have several issues that were returned from the IRS with some accepted, partially accepted and will be reviewed more. Slough reported that his committee has until May 4, 2016 to respond to CP review and will meet on



May 11, 2016 with the SA team to discuss this project further. Slough also reported good participation and a very active committee.

Toll Free Lines, Chair – Sean McPhilamy

Cooney reported they are working on the Authentication review issue having received a response from attorney advisors. This issue is currently being worked by the committee. The other subcommittee has a recommendation that is currently with the quality review team and is expected to be ready for the next JC meeting. The committee is also working on inserting Public Service Announcements instead of the canned music while taxpayers are on hold. Cooney reported that the committee has had very good participation and are welcoming their new member.

Internal Communications, Chair – TBD

Billups reported that the committee was not able to vote on a chair this month, but hope to have quorum to achieve this at the next meeting. Billups reported that we need to have the monthly chair report which will be a brief report of your committee activity no more than 800 characters. These reports are due first Friday of each month and we will have reminders during the JC meetings and or from the committee analyst to have the newsletter ready by the fifteenth day of each month.

Roundtable Discussion

Chaney expressed concerns on what to do since two members have resigned. Both resignations are official, which means that they no longer count against the committee's quorum, and the staff is currently working on filling these positions. Chaney will be kept up today by the staff. Kautzman, requested clarification on outreach reports. Jeans responded that the new consolidated outreach report forms have been sent out to all of the Panel members now. In addition, Chairs or vice chairs should be getting the report by the end of the week regarding this issue. Cooney inquired about the problems with post cards for nonprofits filings. Andrews responded that this issue will be elevated to the Commissioner but no resolution has been determined yet.

JC annual meeting options are:

- 1) 2 hours twice a day for 2 or 3 days.
- 2) 2 hours a day for 4 or more days.

The details are still being developed so a lot of things are being considered to ensure this is a productive and effective meeting.

Closing

Andrews thanked everyone for being on the call and officially closed the meeting.

**Next meeting: May 25, 2016
1 p.m. ET; Noon CT; 11 a.m. MT; 10 a.m. PT**

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

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
March 30, 2016**

Designated Federal Official (DFO)

- Susan Jimerson Acting, TAP Director

Members Present

- Gina Jones National TAP Chair
- Gretchen Cooney National TAP Vice-Chair
- Jeanne Matthews Chair, Taxpayer Communications Project Committee
- TBD Chair, Internal Communications Committee
- Sean McPhilamy Chair, Toll-Free Phone Line Project Committee
- Elizabeth Chaney Chair, Special Projects Committee
- John Slough Chair, Notices and Correspondence Project Committee
- Richard Christensen Chair, Taxpayer Assistance Center (TAC) Improvements Project Committee

Staff Present

- Susan Jimerson Chief, TAP West
- Cedric Jeans Chief, TAP East
- Lisa Billups Senior Program Analyst
- Linda Rivera Senior Program Analyst
- Donna Powers Program Analyst
- Otis Simpson Program Analyst
- Theresa Singleton Program Analyst
- Toni Ross Program Analyst
- Annette Johnson Program Analyst
- Carolyn Sanders-Walsh Senior Tax Analyst
- Deanna Johnson Program Analyst W&I
- Tamikio Bohler Program Analyst, W&I
- Betty Scott Program Analyst, W&I
- Johnnie Beale Senior Tax Analyst W&I
- Kevin A. Brown Management Assistant

Members of the Public

None

Welcome, Review Agenda

Gina Jones welcomed everyone to the call and officially opened the meeting. Susan Jimerson will act as DFO in Sheila Andrews' absence.

DFO/National Office Update/Susan National Office Report

Jimerson shared information received from the public that came through on the web comments. The comments were posted on www.improveirs.org website. On March 23, 2016 there were five comments that came in. One of the TAP analysts reviewed the comments to see if there were issues that the TAP should look at. During the review the analyst noticed the emails stated they received information from TAP requesting their personal information. This included a request for their Social Security number, date of birth and credit card information. This was needed to process a refund that the taxpayers were eligible for. The Treasury Inspector General for Tax Administration (TIGTA) was contacted along with the Administrator for www.improveirs.org and www.tap.space to determine if either system had been hacked. Fortunately, they had not been hacked. To follow with this action an alert was put out on the website about the scam. It is also on the www.irs.gov website under the Tax Scam tab. TIGTA advised the TAP Staff the actions taken were done correctly to proactively stop the scam from going any further.

Invites have been sent out to everyone for the All TAP Quarterly meetings. The next meeting is scheduled for April 28, 2016 beginning at 2 p.m., EST. If anyone did not receive the invitation, send an email to the analyst who will make sure the invite is sent to you. Informational sessions are being looked into. These sessions will be set up to give more information on the processes of the IRS.

The sessions will provide answers to:

- What happens if I owe the IRS money
- What happens if I am audited through an office or campus audit

The first session has been schedule for May 26, 2016 at 2 p.m., EST. There will be more information coming on this topic.

The National Taxpayer Advocate public tax forums that are being held throughout the country are in process. Gina Jones spoke at the Tax Forum that was held in Washington, D.C. Andrew VanSingel spoke at the Chicago Forum. A lot of information is out about the Forums on www.irs.gov and on the news media. The next forum is scheduled for April 4, 2016 in Hendersonville, NC. Contact is being made with TAP members in North Carolina to see if they will be able to attend.

The last thing Jimerson shared was information on TAP Staff updates:

- Donna Powers will be going on a Detail to another area of Systemic Advocacy beginning April 17, 2016.
- Megan Fees who is a Case Advocate will be Detail in behind Powers.

Much success goes to Powers as she begins her detail and welcome to Fees as she comes aboard.

Roll Call

Quorum met.

TAP Chair Report

Jones encouraged the members to try and participate in the Tax Forums when they are being held in the state where members live. All Forums are opened to the public. Everyone should have received the updated Activity Report. The change is noted on the second page at the bottom there is a list of categories with good information on the members time spent. Jones expressed her thank you to the ones who updated the report.

Gretchen Cooney stated the Outreach committee has not met yet. Everyone is encouraged to think outside the box when trying to get members involved in outreach. Once the first meeting is held, there will be more to report during the next meeting.

Approval of November Minutes

Jones mentioned the information went out as a pre-read for the November 25, 2015 minutes. Minutes were approved with grammatical change to remove “ed” from the word “strictened” at the bottom of page three.

Public Comments

None

Project Committee Review/Activities

Tax Forms and Publications, Chair – Mary Kautzman

Donna Powers reported for Mary Kautzman. The committee met in Albuquerque, NM. There are five new members. Powers stated this group is very engaged and excited. They came in ready to work. The committee screened sixty issues new and old. Forty of these issues will be split between the two subcommittees. They will meet the beginning of April. There were three focus groups during the Face to Face meeting. The program owner attended the meeting. They looked at the 974 Premium Tax Credit, 8965 Health Coverage exemption and 8962 Premium Tax Credit. Feedback was shared with the program owner. There were two additional focus groups meeting April 18-19, 2016. They will be looking at the For 8965 Health Coverage exemption worksheet and 8962 form and instructions for the Premium Tax Credit will be taken into consideration and looked at. There are two subcommittees making recommendations on Form 7004 and the instructions and Pub 523 selling your home. The administrative call was held earlier this month. There were eight issues sent to IRS in November concerning 1040 and 1040EZ, 1040A and instructions. Responses are being received back from IRS. The subcommittees are making the determination on whether or not they want to pursue the issues for reconsiderations or acceptance. Powers said it is a busy group and no changes foreseen in the near future.

Toll Free Lines, Chair – Sean McPhilamy

McPhilamy reported the administrative meeting was held. There are two subcommittees working. One submitted the Authentication Retention project and the other



subcommittee is working on the Customer Call Back project. The items the IRS requested in 2009, it appears that the funding has occurred. As they evolve the subcommittee will help to facilitate the how to do in the telephone lines. Gretchen Cooney added a short referral will be sent to the JC a few days prior to the meeting.

Taxpayer Communications (TCC), Chair – Jeanne Matthews

Matthews stated the committee had their Face to Face meeting in Jacksonville, FL. Members were assigned committees and sub committees. The subcommittees had a breakout session to discuss the issues they would be working on. On March 17, 2016 their administrative meeting was held. Some members needed information and business cards to do outreach activity. The analyst will make sure they receive them. When the subcommittee meets, they will check all the issues in the parking lot to see what they will be worked. Issues sent up by the TCC on last year include the Trifold Brochure. It was approved and IRS will implement it on June 1, 2016. A portion of the referral was approved and a portion was rejected on the Collection Form 433F. The information on what was rejected has not been received. The Misdirected Mail Tracking referral had one issue rejected because it was already in place. There were two issues under consideration. The Interactive Tax Assistant referral was approved but never sent up to the IRS. The subcommittees A and B will meet in April. This is a good group with 7 new members who are excited to get started.

Jones commended all of the members on this committee last year. There were good referrals that went up and good responses received.

Taxpayer Assistance Center Improvements, Chair – Richard Christensen

Christensen reported the committee met in Oklahoma City, OK. There are 12 members on the committee. Six of the members are new, one member has resigned and five returning members. They had their administrative meeting earlier this week. Otis Simpson answered some questions that were pending. The committee is divided into two subcommittees. One is headed by Jon Lumbra. They have their project for changing the enclosed circuit television recording that is shown in the lobby of the TAC. They are working off the state of Wisconsin model. They will be looking at ways to use the circuit television broadcasts to help eliminate some unanswered questions. They are looking into the listing of the top reasons why taxpayers visit the TAC. Instead of waiting in lines they are determining where to go to get answers. They are looking into ways to utilize the enclosed circuit system in place. The second subcommittee is headed by Josiah Berry. They received an acceptance from IRS on adding a line to the brochure. The Tax transcript format was not acceptable. The first subcommittee meeting will be held on next week and the full committee will have their meeting on the following week.

Special Projects, Chair – Elizabeth Chaney

Chaney reported the committee met in Albuquerque, NM. There are five new members. Andrew VanSingel joined the project committee. The Screening committee and Quality Review committee was chosen. The subcommittee selected was the International committee. Dean Burk was the Subject Matter Expert (SME) who joined the meeting in Albuquerque to answer questions from the chair. Collette Keeton is the subcommittee

chair. All participated in the first screening committee meeting. A lot of issues were look at. There are three subcommittees:

1. International, working on the problem in getting a temporary social security number while living aboard.
2. There is a group working on the Power of Attorney (POA) for practitioners whose clients already have Identity PINS. There is a time issue in getting the information to the practitioners as the POA.
3. The third subcommittee is working on telephone numbers for International taxpayers. The subcommittee met March 29, 2016. The next meeting is scheduled for April 25, 2016. The committee will be working on issue 29423 which is two years old.

The full committee's next scheduled meeting is April 5, 2016. Some members are undecided where they want to be assigned due to time availability. Contact is being made with the members in question.

Notices and Correspondence, Chair – John Slough

Theresa Singleton reported the committee had the administrative meeting. The full committee met in Jacksonville, FL. Instead of selecting subcommittees A and B, subgroups were established. The names for the subgroups are:

1. Subcommittee Fair and Just
2. Subcommittee Be informed

Jimerson added this is based upon the Taxpayers Bills of Rights. The committee cleared some of the issues during the administrative meeting prior to having the first full committee's meeting scheduled for April 27, 2016. The two subcommittees are currently working on issues and is a good group. There are five new members and seven returning members.

Internal Communications, Chair – TBD

Susan Jimerson spoke on behalf of the Internal Communications Committee. She informed the JC every year a new Internal Communications committee is formed. It is made up of the volunteers from each of the six project committees. The members are selected during the Face to Face meetings. The initial first meeting has not been set up due to the Face to Face meetings just ending. The election of a chair for this year will occur during the first meeting. There is a new analyst, Lisa Billups who will be assuming the analyst duties for the Internal Communications committee. She will be replacing Toni Ross. Thank you to Ross for all the work and Jeanne Matthews who was the chair last year. The committee revisited the Speak-Up Brochures, worked on the Pocket Guide and will continue to work on the Outreach Toolkit to improve and to start up the Newsletter. Anticipate a lot of good things to come from this committee. Jones added the template for the chair report was also worked on by the committee

Gina Jones encouraged member to use the options available if IRS should reject recommendations. Any committee feeling strongly about their recommendation and would like to have a reconsideration done, submit your request with more convincing information. Keep this in mind when responses come in from IRS.

Roundtable Discussion

Chaney expressed concerns on the member requirements for the working hours. Jones explained during the interview process, time commitment is discussed. If the chair needs to be involved, it is encouraged to reach out.

McPhilamy inquired on how to receive feedback on the Activity Reports. Linda Rivera shared a copy of the report is shared with the chair and vice-chair. The due date to have the reports in is the twenty fifth of each month.

Closing

Jones thanked everyone for being on the call.

**Next meeting: April 27, 2016
1 p.m. ET; Noon CT; 11 a.m. MT; 10 a.m. PT**

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