



2015 Joint Meeting Minutes Joint Committee (JC)

- November 25, 2015
- October 28, 2015
- September 30, 2015
- August 26, 2015
- August 4-5, 2015
- June 24, 2015
- May 27, 2015
- April 29, 2015
- March 25, 2015
- February 25, 2015
- January 28, 2015

Joint Committee (JC) Taxpayer Advocacy Panel (TAP) Meeting Minutes November 25, 2015

Designated Federal Official

- Sheila Andrews TAP Director

Members Present

- Michael Swartz National TAP Chair
- Mary Kautzman Chair, Tax Forms and Publications Project Committee
- Gina Jones Chair, Taxpayer Communications Project Committee
- Jeanne Matthews Chair, Internal Communications Committee
- Gretchen Cooney Chair, Toll-Free Phone Line Project Committee
- Nancy Dery Chair, Special Projects Committee
- David Hayes Chair, Notices and Correspondence Project Committee
- Allan Goldberg Chair, Taxpayer Assistance Center (TAC) Improvements Project Committee
- Jamelda Fulton Member, Special Projects Committee
- Paul Lubell Member, Special Projects Committee

Members Absent

- Andrew VanSingel National TAP Vice-Chair

Staff Present

- Susan Jimerson Chief, TAP West
- Cedric Jeans Chief, TAP East
- Donna Powers Program Analyst



- Otis Simpson Program Analyst
- Toni Ross Program Analyst
- Kim Vinci Senior Program Analyst
- Carolyn Sanders-Walsh Senior Tax Analyst
- Kevin A. Brown Management Assistant

Members of the Public

None

Welcome, Review Agenda

Michael Swartz welcomed everyone to the call and officially opened the meeting.

DFO/National Office Update/Sheila National Office Report

Sheila Andrews publicly thanked Michael Swartz for his leadership and for staying with the committee's goals for the entire year. Andrews also thanks Nancy Dery, Allan Goldberg and David Hayes and the entire committee for all of their hard work and dedication throughout the year. Andrews congratulated Gina Jones, TAP National Chair and Gretchen Cooney, TAP National Vice-Chair, for the 2016 TAP year. Andrews reported that the new member package is still going through the approval process and we are still planning the face-to-face meetings for the second week of January 2016. The specifics and order of the meetings will be done very soon.

Roll Call

Quorum met.

TAP Chair Report

Swartz congratulated the newly elected chairs and wished them well going into the next TAP year. Swartz also informed everyone that there are a lot of issues to go over so it will be important for us to move swiftly while going over all of the issues.

Approval of September JC Minutes

October minutes approves as submitted.

Public Comments

None

Project Committee Review/Activities

Tax Forms and Publications, Chair – Mary Kautzman

- Issue 32387 – Form 1040 Health Care Requirements

The background research and analysis page and the section above it were reworded to flow better.

Action Item: Issue elevated to IRS with minor changes.

- Issue 32408 – Taxability of Social Security Disability Benefits

The Form 1040 and Form 1040 A instructions had a statement to define what benefits would be taxable preventing taxpayers from becoming confused. The goal statement was reworded to be clearer. Nancy Dery proposed that the proposed solution section have a sentence added to clarify what benefits are different from Social Security benefits and therefore not taxable.

Action Item: Issue elevated to the IRS with minor changes.

- Issue 32409 – Schedule A Instructions

Proposed solution bullets corrected so the referral reads better.

Action Item: Issue elevated to the IRS with minor change.

- Issue 32861 – Form 1040 V

The recommendation made the payment instructions clear for taxpayers who are making payments whether they e-file or not. The second recommendation was to include the Form 1040 V in the Form 1040 instructions to prevent it from being a second document. There were minor corrections to the second paragraph in the background research section.

Action Item: Issue elevated to the IRS with minor changes.

- Issue 26887 – 1040 Instructions EITC step 1

The recommendation is to the questions to find out if the taxpayer qualifies for the Earned Income Credit. The recommendation is to move step four closer to the beginning of the list so taxpayers can determine their qualification sooner in the document rather than later. Gina Jones suggested a change in the project statement to state the purpose of the recommendation clearly. The benefits and barriers section was reworded to allow the recommendation to read correctly.

Action Item: Issue elevated to the IRS with minor changes.

- Issue 29897 – Add Worksheets to Form 1040 Instructions Table of Contents and Index

The background research and analysis section was changed to remove the paragraph regarding the \$3 charge for presidential donation to be stricken from this recommendation.

Action Item: Issue elevated to the IRS subject to removing the paragraph regarding \$3 charge for presidential donation.

Special Projects, Chair – Nancy Dery

- Issue 33297 – Quality of Service

Paul Lubell reported the recommendation is to have the Customer Service Representative repeat their name and identification number at the end of the call and to have an on hold message reminding taxpayers to write this information down for their records. Another recommendation would add a drop down box on the www.irs.gov website for commendations and complaints for a taxpayer to initiate correspondence if desired. The recommendations also suggest a brief survey for immediate feedback as a way to increase customer satisfaction and show the taxpayers are being listened to. The final recommendation is the collection of statistics or metrics to see if these changes are working. Jones mentioned that the barriers section is incomplete and needs to be fixed.

Action Item: Issue elevated to the IRS with minor changes.

- Issue 32454 – International Issues

Dery reported that this recommendation proposed ways the embassies could help taxpayers be aware of the tax obligations since the international TAC offices have been closed. Dery mentioned that Publication 3742, retired in 2014, has quite a bit of information that would be useful to taxpayers living abroad in light of the changes that have occurred. This publication could be placed in the embassies to provide much needed information for taxpayers living abroad and encouraging their compliance.

Jones questioned why the Publication 3742 was retired as it would be very helpful giving the changes done recently. No solid response has been received from the IRS by the committee.

Action Item: Issue elevated to the IRS with minor changes.

Swartz congratulated Dery for a successful first year for this committee.

Taxpayer Assistance Center Improvements, Chair – Allan Goldberg

Goldberg mentioned how much of an honor it has been to serve on the TAP leadership and also congratulated Gina Jones and Gretchen Cooney as next year's TAP leadership.

- Issue 33689 – Limitations on Volunteer Income Tax Assistance (VITA) Hamper Support for Underserved Taxpayers

The proposal recommends how the IRS could expand the reach of VITA and Tax Counseling for the Elderly (TCE) and enable these programs to service more taxpayers. Since the IRS does not assist in direct tax preparations any longer, these organizations can help to provide help to taxpayers who really need it. This includes, but is not limited to: expanding the assistance with the Schedule C section; allowing and supporting the training of acceptance agents assisting taxpayers unable to get social security numbers to file their taxes; modifying the software to enable amended returns to be file electronically through the VITA/TCE; permitting VITA/TCE to work the Highway Use Tax

that over a million truckers need to file annually and to encourage the expansion of year round partner sites so that more taxpayers can utilize the programs, etc.

Goldberg mentioned that the IRS has already agreed to expand the Schedule C section to some degree. While this is not the TAP recommendation, it does show the IRS moving in the direction we want them to go in. There are still specifics that need to be worked with these proposals, but this is needed to improve the taxpayer experience in helping them to remain in compliance.

Action Item: Issue elevated to the IRS.

- Issue 33632 – Excess Demand, Wait Time

Goldberg reported that this recommendation is for the IRS' appointment only functionality that it is moving into. This recommendation is a roadmap to assist the IRS as it embarks on this endeavor to help ensure that the transition works as facilitative as possible for taxpayers. We have reason to believe that they will find at least some of our recommendations helpful as their new functionality rolls out.

Action Item: Issue elevated to the IRS with minor changes.

Notices and Correspondence, Chair – David Hayes

- Issue 32317/32318/32319 – Notices 5043,5044,5045

David Hayes reported that this recommendation was to review the Form 1040 K letters. Clarification was asked about 5045. Hayes will reword the referral to clearly propose the recommendation and be sure it is easily understood.

Action Item: Issue elevated to the IRS subject to changes to Form 5045.

Taxpayer Communications, Chair – Gina Jones

Jones started by thanking the committee for electing her the National Committee Chair for next year.

- Issue 31082 – Mail Tracking

Gail Reese reported the general frustration of taxpayers sending mail to the IRS then not being able to call and confirm receipt or location of the items that have been mailed. The recommendation is that the IRS figure out a way to get current status information into the system to better be able to let taxpayers know the location of documentation and packages mailed to IRS facilities when they call in to inquire about them.

Action Item: Issue elevated to the IRS.

- Issue 32775 – Form 433-F Collection Information Statement

Jones reported that after review of the form, it is recommended that the bold form number be on the top left corner of the page as is the case with all other IRS forms. The next recommendation is to change the name of the form to Form 433-F "Taxpayer Financial Statement." This recommendation is a better name that shows what the form is collecting. Another recommendation was to add a statement as to what the use of the form is instead of just who should use the form. Jones recommended an additional



change to item number four on page three under section G to correct the wording in the recommendation.

Jones also recommended a change to section H where a couple of places that make comparison to actual expenses and the national standard in a side-by-side comparison. Section 6 covers someone filing by paper to have a current copy of the allowable standards so that the taxpayer can complete the form accurately. In line 7, a direct link to the standards web page is included for those who have online access. Number 8 is some corrections in the PDF fillable for with needed automatic calculations and validations of numbers. Number 9 asks that the Form 433-EZ be reconsidered to being brought to print since it is a simpler version.

Action Item: Consensus to elevate issue to the IRS with proposed changes.

Toll Free Lines, Chair – Gretchen Cooney

Gretchen Cooney thanked the entire committee for voting her to National Vice-Chair for next year. Cooney is looking forward to next year. Cooney reported that the committee had a referral returned to the committee for reworking to have it ready for the January face to face meeting.

Internal Communications, Chair – Jeanne Matthews

- Issue 33695 TAP Speak Up brochure

Matthews reported that the bolder inside was a good change yet the content was the major concern. Swartz mentioned the color makes it much more appealing and it looks a lot better now. Matthews also reported that the October newsletter is already out and the November newsletter is still being worked.

Matthews reported that LeAnna Wilson will maintain the newsletter since Suze Kanack is retiring. This will allow for there not to be a gap in newsletter releases. The TAP Pocket Guide is ready and will hopefully be ready for early 2016. The Pocket Guide will also be included in the TAP Outreach Toolkit folder. Facebook administrator is needed. Matthews has agreed to be the administrator moving forward. Matthews mentioned having the TAP Speak up Brochure updated, the TAP Pocket Guide updated and revising most of the TAP Outreach Toolkit. There is still one chapter that needs to be completed, but Matthews indicated that this was a great year for the committee.

Closing

Swartz thanked everyone for being on the call and for all of their efforts made with the list of referrals being brought forward to the IRS. Swartz mentioned that this was a year of accomplishments that no other Federal Advisory Committee could do. Andrews thanked everyone for all of their work and showed her appreciate to be able to work with everyone. Andrews and Swartz officially closed the call.



Next meeting: TBD

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



**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
October 28, 2015**

Designated Federal Official

- Sheila Andrews TAP Director

Members Present

- Michael Swartz National TAP Chair
- Andrew VanSingel National TAP Vice-Chair
- Mary Kautzman Chair, Tax Forms and Publications Project Committee
- Gina Jones Chair, Taxpayer Communications Project Committee
- Jeanne Matthews Chair, Internal Communications Committee
- Gretchen Cooney Chair, Toll-Free Phone Line Project Committee
- Nancy Dery Chair, Special Projects Committee
- David Hayes Chair, Notices and Correspondence Project Committee
- Allan Goldberg Chair, Taxpayer Assistance Center (TAC) Improvements Project Committee
- Gail Reese Member, Taxpayer Communications Project Committee
- Scott Wallace Member, Taxpayer Assistance Center Improvements project Committee
- Sallie Mullins-Thomson Member, Taxpayer Assistance Center Improvements project Committee
- Mary Jo Thompson Member, Taxpayer Assistance Center 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
- Cindy Jones Manager, W&I
- Karin Rice Public Affairs Supervisor
- Carolyn Sanders-Walsh Senior Tax Analyst
- 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

Michael Swartz welcomed everyone to the call and officially opened the meeting.

DFO/National Office Update/Sheila National Office Report

Sheila Andrews wanted to remind the members that an email about the elections with pertinent information should be referred to so all members know about this process. Andrews announced that the returning members will be solicited for committee choices for next year very soon. This will be a time continue their work or try something new if that is something that members want to do. This will be sent by Otis Simpson no later than the beginning of next week.

The face to face meetings are scheduled for the second week of January 2016. The Communications and Notices & Correspondence committees will be meeting in Jacksonville, Florida. The Special Projects and Tax Forms & Publications committees will meet in Albuquerque, New Mexico. The Toll Free and the Taxpayer Assistance Center Improvements committee will meet in Oklahoma City, Oklahoma. These plans are still tentative and still being determined. The package is still in the approval process and will be done soon. Andrews also thanked everyone for their efforts this year.

Roll Call

Quorum met.

TAP Chair Report

Swartz asked each chairperson to report on what is going on with each committee and what is in their hopper also. Swartz also encouraged attendance to the "How to be a Chair" training for anyone interested in such a position to be sure to know what to expect. Swartz also encourage those nominating members for positions to communicate this thought to the person to ensure they are interested in a position first.

Swartz inquired about possibilities with the November 25, 2015 next meeting. It was determined that the scheduled meeting date will suffice and the committee will have the final meeting as scheduled.

Approval of September JC Minutes

September minutes approves as submitted.

Public Comments

None

Project Committee Review/Activities

Taxpayer Communications, Chair – Gina Jones

- Issue 32780 Interactive Tax Assistant

Jones reported that two referrals remain in legal and Systemic Advocacy review with nothing to report about them at the moment. These will hopefully be available on next month's meeting.

Gail Reese reported that the tool is very detailed and helpful for assisting taxpayers and eliminating the need of many of them to seek assistance in Taxpayer Assistance Centers (TAC)s. There was conversation about the suggestion to change the font size being reworded to accurately determine if this is necessary. It was determined to leave the suggestion as is. Although most of the suggestions have been accepted by the IRS, it still has to be sent to the IRS in order for TAP to get credit for this referral.

Action Item: Consensus to elevate issue to the IRS.

Tax Forms and Publications, Chair – Mary Kautzman

Kautzman reported that while they will have six referrals in response to 10 issues submitted by taxpayers for the next JC meeting concerning

Special Projects, Chair – Nancy Dery

Dery reported that they will have two referrals for next month's JC meeting. The international subcommittee is currently working another referral for next year. The hope is that there are enough returning members to benefit this referral. The ID Theft and quality of service subcommittees are working on other issues for next year so it will keep the committee busy.

Taxpayer Assistance Center Improvements, Chair – Allan Goldberg

- Issue 33489 Hate to Wait, Save Time Without the Lines

Goldberg petitioned any pre-reads to be submitted as soon as possible since next month's JC meeting looks to be very busy. Goldberg reported that his committee expects to have two issues to be heard by the JC next month. One is to provide a deliberative roadmap for the IRS to consider as it plans to transition to an appointment only system at its TACs. The other is to suggest ways the IRS can better leverage the free voluntary tax preparation programs by opening them up to more taxpayers.

Goldberg introduced Scott Wallace to speak more about the proposals and suggestions their subcommittee came up to deal with the many money driven issues taxpayers face at the TACs currently. Wallace reports that this referral details the serious problems faced by taxpayers at the over 400 TACs throughout this country. Extremely long lines before offices even open and some of these centers closing their doors before closing time due to overcrowding is just some of the issues Wallace reported.

These issues still persist even with the proposed appointment only suggestion that the IRS will soon introduce. This proposal is sort of a Cliff's Notes of the typical types of publications that are available for taxpayers to be able to reference. This one pager can be handed to each taxpayer as they enter the TAC and may even encourage taxpayers to find solutions to their tax issues outside of the TACs.

According to the referral is that 70 percent of the people going to TACs are there for resolving a notice, obtaining a transcript and making a payment. All of these issues can be resolved outside of visiting a TAC and instead on the www.irs.gov website. This is what the referral is attempting to solve. Minor corrections and payment options within TACs was discussed. It was determined that if a taxpayer indicates their visit is just to make a payment most TACs would allow them to go to the front of the line and make their payment.

Karin Rice suggested that the entire web address be included in this suggestion to make it easier for taxpayers to be able to go directly to an option online to make a payment. Swartz cautioned that typing long links may lead to errors or websites that may lead to the taxpayer to get lost. Instead of cluttering the referral, it may be better to walk the taxpayer to navigating the site to get to desired areas on the website. Swartz also suggested consistency in the websites included within the referral. Rice suggested finding out if printing is an option since this would have to come out of a budget that is already strained for next year. Jeanne Matthews suggested that this, once it is approved, be included on the TAP toolkit also.

Action Item: Consensus to elevate to the IRS.

Goldberg reported that they have one proposal expected to be ready for next month's meeting. We consulted Special Projects about security breach concerns and recent security issues with the IRS.

Notices and Correspondence, Chair – David Hayes

Hayes reported that four items are being reviewed by subcommittees and two of them will be presented at next month's JC meeting. One is issue is concerning three letters developed by the IRS to deal with missing information on reporting forms 1099 K. The other issue is the one that ensures that social security numbers appears in a truncated form on letters.

Hayes reported that one of pending issues for next year deal with understanding the difference between due date and date due, but this has been pulled by the IRS until next year. The last issue deals with inconsistent dates and correspondent numbers coming from the same office regarding the same case.

Toll Free Lines, Chair – Gretchen Cooney

Cooney reported that her committee is working on the authentication process being needed only once and the other issue was the call back virtual hold issue. These referrals will be ready for next year since there is still a lot of work needed on them.

Internal Communications, Chair – Jeanne Matthews

- TAP Pocket Guide and the TAP Outreach Toolkit

Matthews reported that pocket guide now reflects the new standard hours for TAP member per year to 200 to 300. It also has a portion that allows members to their information on it also. Matthews also reported that the toolkit has 22 chapters that will be in it. The only chapter that is still being worked is the one with the success stories. This project is still ongoing. Matthews is encouraging the committee to review this and send any comments by November 9, 2015.

The hope is that this project be updated every couple of year to ensure that it remains fresh and of high quality the TAP. The TAP Brochure is heading to the legal department for review at this point. In addition, the success stories were removed because will allow the document to remain fresh and not need updates as often as a result.

Otis Simpson reported that the Pocket Guide will have to go through the process of determine if it can be printed. Jimerson reported that it has to be determined that the format is correct for printing and once this is done we can request the item to be printed by the print specialist.

Matthews reported that Lisa Billups sent a link to the committee so they could go online and review the toolkit. Chapter 11 is the only chapter that has not been uploaded to the link yet.

- Inactive/Non-Participating members

Andrews reported that we do not have a mechanism for suspending a member. Currently, we would have to go through the process of removing inactive or non-participating members. Andrews also reported that we have to change our process to become more proactive with dealing with this sort of behavior quickly. The intent is to get the members to either resign before the new TAP year begins.

Andrew VanSingel reported that we have to be careful about how we make these communications. The goal is to see if they still want to be involved with the committee and encourage them to either work with the committee or resign.

Andrews reported that if there is not a response after a certified letter from the TAP Chief and then the director, then the formal removal process will be initiated. Andrews also reported that the referral for the Local Taxpayer Advocate is still in the review process. Andrews believes that most likely it will be a partially approved referral due to some parts of this process being informal.

Regarding next month's call, Swartz reported that it will be conducted differently with a strong focus on advance reviews and limited responses to referrals. The hope is to



streamline the process to allow time to address all the referrals that will be presented to the committee.

Closing

Swartz thanked everyone for being on the call and for all of their efforts with their committees then closed the call.

**Next meeting: November 24, 2015
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
September 30, 2015**

Designated Federal Official

- Sheila Andrews TAP Director

Members Present

- Andrew VanSingel National TAP Vice-Chair
- Mary Kautzman Chair, Tax Forms and Publications Project Committee
- Gina Jones Chair, Taxpayer Communications Project Committee
- Jeanne Matthews Chair, Internal Communications Committee
- Gretchen Cooney Chair, Toll-Free Phone Line Project Committee
- Nancy Dery Chair, Special Projects Committee
- David Hayes Chair, Notices and Correspondence Project Committee
- Allan Goldberg Chair, Taxpayer Assistance Center (TAC) Improvements Project Committee

- John Slough Vice-Chair, Notices and Correspondence Project Committee
- Richard “Kent” Christensen Member, Taxpayer Assistance Center (TAC) Improvements Project Committee

- Gail Reese Member, Taxpayer Communications Project Committee

Members Absent

- Michael Swartz National TAP Chair

Staff Present

- 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
- Kim Vinci Senior Program Analyst
- Cindy Jones Supervisory Program Analyst, W&I
- Tamikio Bohler Program Analyst, W&I
- Kevin A. Brown Management Assistant

Welcome, Review Agenda

Andrew VanSingel welcomed everyone to the call and officially opened the meeting.

Roll Call

Quorum met.

DFO/National Office Update

Sheila mentioned there is a possibility for shutdown, but this is still being deliberated. In the event a shutdown occurs, the IRS and TAP will not be allowed to work in any capacity. Andrews reported that follow up with attorney advisers about suspended status on members is still being worked and should be ready next month. Andrews also reported that the referral from last year regarding working with LTAs both will be addressed next month.

Approval of August JC Minutes

Minutes approved for posting.

Public Comments

None

Project Committee Review/Activities

Taxpayer Assistance Center Improvements – Chair, Allan Goldberg

- *33415 Sustainability of VITA/TCE Sites*
Goldberg reported that the referral to enhance support and training opportunities with VITA and TCE sites is ready to be approved. Kent Christian reported this proposal will firm up the relationship between the IRS and VITA/TCE. Goldberg indicated that due to not preparing taxes, and forwarding many of them to the VITA and TCE sites, the IRS has saved quite a bit of money so this should be factored into the IRS' ability to implement these recommendations. Gretchen Cooney suggested the Project committee be clearly identified within the referral. VanSingel presented minor revisions.

Action Item: Consensus to elevate, pending proposed changes.

Tax Forms and Publications – Chair, Mary Kautzman

- *Issue 32077 Form 1139 – Corp. Application for Tentative Refund*
Mary Kautzman indicated this referral needed to be revised several months ago and is now being presented in a much more well-ordered form.

Action Item: Consensus to elevate.

- *Issue 33015 Form 974 – Premium Tax Credit*

Action Item: Consensus to elevate.

Special Projects – Chair, Nancy Dery

Dery reported the committee is working on two referrals expected to be sent to JC next month. Dery mentioned that they have a couple of issues proposed for next year that appear to be a good start for then.

Toll-Free Lines – Chair, Gretchen Cooney

Cooney reported that the committee is working on the Practitioner line and the main IRS line. The referral is focused on requiring taxpayers to be authenticated by putting information into the automated system only once. They are also working on a system that would provide call backs for taxpayers. Cooney hopes to have this referral by the November JC meeting.

Notices and Correspondence – Chair, David Hayes

Hayes reported that their committee is working on having several referrals for the November meeting.

Taxpayer Communications – Chair, Gina Jones

- *Issue 32780 Interactive Tax Assistant (ITA)*
Jones reported the committee is trying to wrap up issues with two referrals in the process of being elevated to the JC.
- Issue 32780 – Gail Reeves reported the Interactive Tax Assistance (ITA) was reviewed in great detail to ensure this was a good tool for taxpayers and recommended improvements necessary to improve the taxpayer experience. Increase the font size is the best suggestion received yet. The program owners have already made most of the corrections, but this step needs to be done to ensure TAP receives official credit for its participation. The correct referral should be sent to the committee to be reviewed so this issue can be discussed next month.

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Action Item: Issue will be tabled until next month's meeting.

Internal Communications – Chair, Jeanne Matthews

Matthews reported the September newsletter should be ready for distribution very soon. Someone from Internal Communications will help with the newsletter to avoid missing one for January and February. The TAP brochure continues to be changed before it goes into publication very soon. The outreach toolkit is still being reviewed, but it needs to be reviewed by the JC. We are in the process of determining how to share such a large document so the JC can review this. Matthews mentioned once this has been determined, the JC will be notified of where it is and the time frame left for this to be completed.

Inactive/Non-Participating members

Resignations will be asked now and be effective for the next TAP year instead of trying to remove them through any formal process at this late stage of the TAP year.

Round Table

Goldberg brought up a need to foster more public involvement in the JC meetings. Andrews reported that outreach could be a way of drumming up interest along with the federal register notices that are processed prior to each meeting. VanSingel responded that the JC is more so for completing TAP business and not necessarily for public participation and the individual committees would be perhaps better for possible public participation. VanSingel mentions the new proposed Virtual Outreach Initiative may help with publicizing TAP.



Andrews mentioned that we are still awaiting two committee proposals for next year.

Closing

VanSingel officially closed the call.

**Next meeting: October 28, 2015
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
August 26, 2015**

Designated Federal Official

- Sheila Andrews TAP Director

Members Present

- Michael Swartz National TAP Chair
- Andrew VanSingel National TAP Vice-Chair
- Mary Kautzman Chair, Tax Forms and Publications Project Committee
- Gina Jones Chair, Taxpayer Communications Project Committee
- Jeanne Matthews Chair, Internal Communications Committee
- Gretchen Cooney Chair, Toll-Free Phone Line Project Committee
- Nancy Dery Chair, Special Projects Committee
- David Hayes Chair, Notices and Correspondence Project Committee
- Allan Goldberg Chair, Taxpayer Assistance Center (TAC) Improvements Project Committee

- John Slough Vice-Chair, Notices and Correspondence 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
- 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

Michael Swartz welcomed everyone to the call and officially opened the meeting. Swartz indicated the meeting length increase will take place next month.

DFO/National Office Update/Sheila National Office Report

Sheila Andrews announced that we had a very successful face to face meeting. Andrews praised those who could attend and those who sent representatives in their place. Andrews also reminded the committee to focus on getting their final referrals for their committees out since we are quickly approaching the end of the TAP year.

Andrews reported that, because of budget shortfalls for next year, the regional face to face meetings will be strategically planned out for next year so we can better plan and budget for it. The date will be the second week of January and will be a standing date.

Roll Call

Quorum met.

TAP Chair Report

Swartz reminded the committee to keep the deadlines and process times in mind while getting any last minute referrals completed. Swartz also praised the staff for being able to get the face to face meeting minutes done so well under such fast moving circumstances. Swartz also stated that we will be focusing on how to deal with unproductive or non-responsive members moving forward. Swartz mentioned that the staff should be implementing the new procedures for regularly updating the committees on referrals during each meeting as well as including other committee members who submitted referrals to different committees when the referrals are discussed.

Approval of August Joint Committee (JC) Minutes

Swartz mentioned there was a deadline for committee reports for 2016 missing in the minutes. Allan Goldberg indicated that it was the second week of September. The August face to face minutes were approved including small corrections.

Public Comments

None

Project Committee Review/Activities

Tax Forms and Publications – Chair, Mary Kautzman

Mary Kautzman reported that her committee is working on two major issues to be submitted in October dealing with the Form 1040EZ and 1040A. Both of these issues are being worked. Kautzman reported her Activity report includes two members completely absent, three with no activity reports submitted and three that did not receive the email containing the new procedures. Those who did not get the new directions submitted their reports by email.

Toll-Free Lines – Chair, Gretchen Cooney

Gretchen Cooney reported that her two subcommittees are working on reduction in service and are waiting on IRS staff responses. Swartz referred to a report indicating 1/3 of elderly/underserved do not have internet access and wondered if statistics could be gathered as part of the committee's referrals. Swartz indicated that this should be considered while the IRS transitions to a more automated service. Cooney and



Goldberg mentioned that this will be included in both of their committee activities and research moving forward.

Taxpayer Communications – Chair, Gina Jones

Gina Jones thanked her vice-chair, Jerome Bell, for attending the face to face meeting for her. Jones indicated disappointment with IRS resolving an issue prior to elevation after her committee had put some much time into the subject. The committee pushed back to have both standard and itemized deductions placed in a much more prominent and easily noticed section on the www.irs.gov website. The Interactive Tax Law Assistant referral will be presented on the next JC call as a response was not received from the IRS prior to this meeting. Jones reported that much of this has been corrected but TAP needs to be credited for suggesting these corrections be made.

Jones mentioned that during the JC face to face meetings the Schedule C issue was elevated to the IRS but links were recommended by the committee to be included. This has been done and resubmitted. The TAP or TAS name and telephone number will not be included on the brochure since it may confuse taxpayer. Jones expects to have another referral before the JC next month from their subcommittee B.

Taxpayer Assistance Center Improvements – Chair, Allan Goldberg

Goldberg reported that they have one proposal expected to be ready for next month's meeting. We consulted Special Projects about security breach concerns and recent security issues with the IRS.

Special Projects – Chair, Nancy Dery

Nancy Dery reported that her committee is working on a referral to help taxpayers abroad be aware of their tax obligations. The committee is also looking for ways to revise Pub. 4732 and bring it back into circulation. Dery reported that the ID Theft subcommittee worked very hard on a referral involving robo-calls that ultimately fell through because the IRS had already worked the issue. Quality of service is working on complaints and/or compliments being written regarding service received. Dery reported that in the July meeting, Jimmy O'Connor, an IRS Call Center manager, provided information about how calls are currently being handled. The committee is using this information as they complete their referral.

Notices and Correspondence – Chair, David Hayes

David Hayes thanked Vice-Chair, John Slough, for attending the face to face meeting for him. Hayes reported on the Referral 24894-CP2000. A suggestion for rewording the phrase "tax you owe" to "tax you may owe" was submitted for elevation. Goldberg suggested placing the "...or pay the tax they do not owe..." into the referral. Swartz proposed asking that this change be made on a trial basis by the IRS in the referral. Goldberg suggested the "If you don't agree" option be close to the end of page 5 instead of the beginning on page 6 this lets the taxpayers know they have options other than simply paying. The phrase tax professional or attorney was suggested instead of accountants. The request for IRS to test on a trial basis should be in the body of the referral instead of in the cover letter per Lisa Billups.



Action Item: Referral will be elevated to the IRS subject to the suggested changes being made first.

Hayes reported that the following forms are being worked: form CP 87B; 5043, 5044, 5045, and the form 1099K issue. This is all the committee is currently working on.

Internal Communications – Chair, Jeanne Matthews

Jeanne Matthews reports that the TAP brochure has been forwarded to the attorney advisor office for review. The August newsletter was posted to www.tapspace.org and to our Facebook page. Chair reports should be shortened to keep the newsletter to one page. Updating the Outreach toolkit is over halfway through. Matthews reported that options are being considered on how to forward the 20 chapters being reviewed to the JC in the simplest and easiest manner.

A discussion occurred regarding why the newsletter has to be only one page. It was determined that, given the additional committee and information that needs to be reported, the newsletter should be two pages.

Action Item: This change will take place next month.

Andrews reported contacts have been made to see what can be done about inactive members. Andrew VanSingel reported that approximately 17 members fall into this category and the focus would be on the first and second year members. These issues are still being visited since this is a very pressing issue for TAP giving our current bylaws and options.

Action Item: This item will be moved to next month's meeting.

Jeanne Matthews inquired why the chairperson isn't notified if a member resigns. Swartz indicated that the committee chairs should be notified of any changes if a member resigns or is removed from a committee. In regards to the 2014 annual report, Susan Jimerson reported that the report is in the final stages and should be completed very soon.

Closing

Swartz thanked everyone for being on the call and for all of their efforts with their committees then closed the call.

**Next meeting: September 30, 2015
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
August 4 – 5, 2015**

Designated Federal Official

- Sheila Andrews TAP Director

Chair Members Present

- Michael Swartz National TAP Chair
- Andrew VanSingel National TAP Vice-Chair
- Mary Kautzman Chair, Tax Forms and Publications Project Committee
- Jerome Bell Vice Chair, Taxpayer Communications Project Committee
- Jeanne Matthews Chair, Internal Communications Committee
- Gretchen Cooney Chair, Toll-Free Phone Line Project Committee
- Nancy Dery Chair, Special Projects Committee
- John Slough Vice Chair, Notices and Correspondence Project Committee
- Allan Goldberg Chair, Taxpayer Assistance Center (TAC) Improvements Project Committee

Staff Present

- Kim Stewart Director, Executive Director, Systemic Advocacy
- 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
- Tamikio Bohler Program Analyst, W&I
- Kevin A. Brown Management Assistant

Roll Call

Quorum was met.

Members of the Public

No members of the public on the call.

Welcome, Review Agenda

Michael Swartz welcomed everyone to the call and officially opened the meeting. Swartz thanked everyone for attending and thanked the vice-chairs for attending in place of the chairs. Attendees introduced themselves and provided professional and personal backgrounds. Sheila Andrews provided administrative information.

DFO/National Office Update

Andrews – June Report to Congress – two issues, copies of all pre reads in packages. Annette Johnson is on detail to TAP for six months. The budget for next year is worse than this year; however, we will discuss and plan strategically.

Kim Stewart personally thanked all the volunteers for their work and commitment to the TAP. She told the panel they support the foundation of this country with the volunteer program. For those who give their time to this organization they have her gratitude. She stated the Internal Revenue Service (IRS) collects 90 percent of revenues in the country; and TAP is part of the process; she also stated she speaks on budget and its challenges; uses technology to get our message out to the public; but needs the grassroots outreach.

Partnership is letting you know what she can and cannot do with the budget; TAC – unprecedented low level service at TAC; Toll-free numbers – unprecedented low service on the toll free lines – average level of service was 40 percent, which means 60 percent of the people who needed our service were unable to get it. The TAC went to appointments because of low level of staffing; Chicago turned individuals away in droves; people may stop voluntarily complying; Need to look at services we are going to provide; The National Taxpayer Advocate (NTA) states we need to change the paradigm from being a collection agency and not a service; Technology is not the answer; people will solve the Chicago problem; Budget being affected by political forces; If we go into filing season with a Continuing Resolution (CR) we will not get out of the gate fast enough; anything new we are thinking, we will not be able to do.

The NTA's plan is to take teeth out of private debt collection. Caseload for Taxpayer Advocate Services (TAS) will increase because of the private debt collection. Goldberg asks if it is a constitutional issue; Stewart agrees; Stewart will not speak for NTA on the issue. Goldberg speaks about private debt collectors selling information.

Swartz spoke on Affordable Care Act (ACA) issues; Swartz asks Stewart was there proof that the ACA caused any issues; Stewart speaking from TAS service case perspective; the filing season went well; there was filters dealing with ACA that the IRS chose not to use. Will be used next tax season; Stewart states this year went smoothly for ACA.

Really look to volunteers to sure up and identify opportunities to help and serve the American taxpayer. Emphasis should be on impacting and advocating for the taxpayer. Very dire prospective budget, we will still be committed to TAP's role with improving the system. From a partnership perspective, Stewart will support you (hinging on the budget). The TAP is our listening post for the taxpayer.

TAP Chair Report

Swartz stated he was looking back at why he got involved in TAP. For a good functioning democracy, there has to be a tax code, but we can't make it so difficult to participate. If it is made so complicated to comply with, law abiding citizens who are paying taxes will be less willing to be compliant. The TAP is part of the equation – whatever we can do to keep the

system functioning as it should and not be unduly burdensome. Mission is continually hampered by budget issues. Swartz thanked the committee for their participation.

Approval of July JC Minutes

The minutes for July were approved.

Program Owners Comments

Tamikio Boehler, Wage and Investments (W and I) liaison, thanked everyone for the issues and recommendations submitted to the IRS. Wage and Investment is glad to be participating in the process. The 2015 projects are being completed. The 2016 projects are being reviewed. She passed out a listing of resources with common links that are asked of the Subject Matter Experts (SMEs) on a regular basis.

Swartz brings up issue of accepting IRS projects. Goldberg speaks about issues they were given that were all rejected; his committee was also given an issue that was so expansive that it was hard to tackle; Goldberg feels the IRS already has the solutions to the questions that they are asking.

Annual Report changes; Stewart spoke about IRS accepting and not accepting; Speaking from administrative owner of TAS Annual Report to Congress (ARC), while the IRS acknowledges recommendations and they noted the responses; the initial responses may say rejected, but years later they are implemented. Centralized identity theft - they finalized implementation of NTA recommendation; Standard time frame Levy release needs to be created; this was 2003 recommendation from the NTA; last year (2014) was the first time they implemented it. Nowhere was the NTA mentioned but the NTA claimed victory. Swartz wants the program to know it matters. John Slough spoke about working on the form 3115 with Russ Pool. The recommendation got implemented immediately and Slough didn't care about the credit that was given to the panel.

Andrews addresses Swartz's question about projects we accept and take on. Andrews stated the IRS gives us projects that have meaning for them and to have grassroots input on. The IRS has to commit resources.

Toll Free – has received good projects to work on.

TAC – was asked to review a project and all the recommendations were rejected. A second project was so large and all-consuming the panel felt it was impossible to work. Recommendations were made, but it seems like IRS already had a response in mind that the TAP didn't come up with. It seemed like the IRS wanted answers that would help the IRS, not the taxpayers. Stewart – While the IRS might think it was a good recommendation, they never see the light of the day. They might come to fruition at a later date.

Project Committee Review/Activities

Special Projects – Chair, Nancy Dery

Nancy Dery has international member from Switzerland and she enjoys the member's energy; The IRS has closed offices overseas. Member has solicited different organizations and embassies to tackle the issues. Closer to producing a referral to address issue; One estimate is there are over eight million Americans living abroad. A subcommittee is looking at the possibility of a brochure to give to taxpayers living abroad to help them comply with their tax obligations. Some countries give out information in their passports.

ID Theft Committee – Subcommittee had a hard time starting. Committee writing up a referral on the ROBO calls, called CAPTCHA.

Quality of Service Committee – A subcommittee is trying to figure out a way for taxpayers to address bad service by IRS employees directly with the IRS.

Goldberg spoke on the IRS changed policy on issuing new PIN; people not online are not aware of this change and they are using the same PIN (LT239 letter). Boehler mentions new link that addresses getting a new PIN and calling a 1-800 number to change the PIN.

Toll-Free Lines – Chair, Gretchen Cooney

Gretchen Cooney indicates they will be resubmitting a referral – The subcommittee was asked to provide three additional words in the document by the Attorney Advisor; however the subcommittee that elevated wants to leave it as is.

Action Item: Issue 32848 – EITC Audit Phone Line Script – approved for elevation.

Subcommittee working on reduction in services and trying to address, specifically call back options and courtesy call backs, hours of operation.

Notices and Correspondence – Chair, David Hayes

Vice Chair John Slough spoke to TAP chair, letters are being examined. Philessia Edwards resigned and Tabitha Butler is now on the subcommittee. The issue they were concerned about was the CP-2000. The proposed solution did not have the full amount on the front page, so that is why it was sent out. It looks less like a demand for payment and revision of Publication 5181 is still in progress. The other issue is with the due dates. When notices come to the taxpayer, it is due to be received by the IRS...looking to bringing consistency to the taxpayer. Eugene Goldfarb is working on this issue. The last time the referral was reviewed it was simple changes.

Action: The due date issue is being elevated to IRS

Taxpayer Assistance Center Improvements – Chair, Allan Goldberg

Chair Allen Goldberg stated the TAC committee has a lot on its plate. Looking at the unmet demand; Treasury Inspector General for Tax Administration (TIGTA) report indicated there is a half million taxpayers not being helped at TACs. The committee feels this is a much larger number. If you don't get a ticket by 8:30a.m., you won't be seen and counted. The TAC committee is meeting and interviewing the TAC managers to determine the problems.

To address the problems, we need to know how many people are not getting in. If people cannot get into the phone system, they will go to the TAC offices. If IRS is only servicing 47 percent, they are exacerbating the problem. "Get Transcripts" has shut down, and 8 million people downloaded the application and then the accounts were breached – so the only way to get a transcript is to come into a TAC office. Appointment test during the filing season – this is an issue the TAC committee will focus on.

Volunteer Income Tax Assistance (VITA) Site and Tax Counseling for the Elderly (TCE) – How to expand the program.

Goldberg stated the panel is also hoping to have a publication on what the public can do in lieu of waiting in a TAC office for three hours. Means and method of avoiding the TACs is the focus. There is a vulnerable population that is affected by the IRS migration to online services and interactive processes. We cannot forget about people who don't have computers. Approximately one third of seniors don't have computers.

Issue 33169 – Enhancing IRS Support for VITA/TCE Grant Programs

Goldberg discussed Issue 33169 – Attorney Advisor had issues that were addressed but did not change the recommendations. Issue will be tabled until tomorrow so the fellow chairs can properly review it.

Since TAC abandoned its roll in tax preparation placing a burden on the VITA/TCE program. Committee believes IRS has a fiduciary responsibility to enhance the public in volunteering at the VITA/TCE sights. Goldberg addressed the report going through the Attorney Advisors and the feedback he received on updating the statistics. JC committee reviews.

Andrew VanSingel addresses grammar and passes edits to Simpson for correction.

Action: Issue was approved pending grammatical changes.

Tax Forms and Publications – Chair, Mary Kautzman

Chair Mary Kautzman indicates no issues from IRS. The IRS doesn't have a lot of issues this year. The committee is presently looking at two projects on the Form 1040 Form and Instructions, as well as various other grassroots form and publication issues.

Taxpayer Communications – Vice Chair, Jerome Bell

Vice Chair Jerome Bell states referral form and brochure for schedule C initiative has been submitted by Subcommittee A along with the Interactive Tax Law Sites, Subcommittee B no longer has Taxpayer Burden Reduction as an issue. Three new issues concern Notice Improvements and Collection Agents pertaining to correspondence received. TAP received a complaint from a retired IRS agent – The Taxpayer Bill of Rights (TBOR) is being violated and he wants to make recommendations. The issue is 31828. Swartz spoke on design of brochure that the committee created. The pocket guide has been elevated to the Attorney Advisors.

Goldberg suggested maybe a brochure for Schedule E – Rental Activities



Action Item: Issue 32776, Improve Compliance with Schedule C Filers, approved for elevation.

Andrews advised the panel to include the TBOR component into the referrals. They are broad and general enough to include.

Newsletter

Susan and Dan are doing a good job – please get the info to them by the tenth of the month and they then have the time to get it to the JC and out to the site.

Annual Report – Framing the report.

Focus needs to be some general information on TAP and then the recommendations. It should be one voice from each committee. Slough thinks there needs to be an outline. Simpson comments on capturing the issues that carry over from one year to another. Andrews stated there is a need to provide background on issues. Goldberg states there needs to be a section on emerging issues.

The TAP brochure (Speak Up)

The committee wants to re do the Speak Up brochure – new colors and information; It is with the Legal department and then will go to graphics department (Pub. 3753). Several comments were made to correct and change the brochure. The brochure has been elevated to the Attorney Advisors.

A suggestion was made to look at the Tool Kit and update it – divided it up between everyone. Make the success stories up to date with more recent successes.

Not enough internal communications going out. Need to have a better sense of what is going on in Systemic Advocacy (SA) or TAS.

Sheila indicated she is talking to the managers on how to bring this information to the panel.

TAP Space

Met with Communications & Liaison (C&L) and asked for a major overhaul which is very expensive.

Internal Communications will include a blurb in the newsletter for members to update their profile information.

Outreach Report/Discussion – Andrew VanSingel

Provides update on Denver Forum – disappointing because of location. Two referrals received. Three more referrals are coming up. Andrew VanSingel and Mary Kautzman will be attending the Orlando tax forum. Working with the Local Taxpayer Advocates (LTAs) is working well. The biggest concern is getting the activity reports in on time; even if members are not conducting outreaches, they are still not submitting the report; conversation held on dealing with members not doing TAP work; Members using VITA as a platform; John Slough

conducted two presentations at the small business telephone center; He will be doing the congressional in Washington, D.C. next year.

Action Item: Issue referred back to committees.

Member Survey

Cedric Jeans passed out the member survey, and conducted a brainstorming session. Jeans asked separate questions of the first, second, and third year members. He is trying to capture positive feedback. He listed ways to address keeping members involved.

Members and staff provide input, see below:

- Set clearer and higher expectations
- Chair commitment
- Mentoring Programs
- Suggestions for getting members engaged
- Member Contributions
- Clear Expectations
- Monthly Report
- Interview Process
- Peer Pressure
- Assigning of Responsibility
- FACA Training
- Consensus

New question should be: Are we getting the right issues?

Preparing for TAP Year 2016

Andrews discussed the plans for the year –

Tax Forms and Publications (TFP) is unique, receiving the majority of their work from the IRS. Notices and Correspondence is similar to TFP. The chairs need to review this year's projects and decide what the focus should be. International piece is part of Special Projects. Communications always have things dealing with taxpayers, how to do it better. There is nothing preset in the TAP staff's mind on where we should be going. Be impactful. If there is a project – especially tied into the TBOR the chairs should not be hesitant to bring this up. Communication to the IRS on what we will be looking at.

Strategic Planning – Plans for the Face to Face meeting, which is contingent on money. The new TAP year starts December 1, 2016. The TAP staff would like to make a definite fixed week for the face to face meeting each year. The staff decided the second week of January would be a good week to have the meetings.

Action Date: First choice the second week of January, (January 11, 2016), second choice, second week in March, (March 14, 2016).

National Chair/Vice-Chair Elections

Swartz discussed the election process for election the Chair and Vice Chair of the TAP membership. Mike reads the election process to the JC committee. Sheila stated the procedures are by design to elect a TAP chair with experience.

Motion to approve subject revising of the election dates. Lisa Billups goes over the election procedures again with the committee. Andrews recommends we have a *So You want to be a Chair* with the TAP members during the quarterly meeting.

Action Item: Goldberg was elected as the chairperson for the election process. The election date is subject change.

SBSE – Carolyn Sanders-Walsh

Small Business and Self-Employed (SBSE) has an approved database for Congressional Liaisons. Analyst would have to help TAP member with access to information in database; would use outreach request template; Do not alter technical content of the material; If you find technical information has changed in the presentation prior to a presentation; please check with SBSE analyst. Sanders-Walsh asks JC to review the Outreach request form. Swartz suggests adding the length of the presentation to the form. TAP members cannot access system because of the firewall so the TAP members have to request it through the TAP staff. Goldberg asks can we place the forms be downloaded to www.tapspace.org. Andrews asks if the staff can sign up for automatic update alerts. Sanders-Walsh asks if we can share outreach results i.e. event, location and size with SBSE. Goldberg raises complication factor of being able to answer questions that may arise during outreach. Sanders-Walsh states those questions can be raised with the TAP Analyst. Sanders-Walsh provides presentation on TBOR via SBSE outreach system. Information is only available in English.

Trending Issues in Systemic Advocacy

Tamara Birts explained how issues are processed through Systemic Issue Review and Evaluation (SIRE) to Systemic Advocacy Management System (SAMS). Currently work Centralized Authorization File (CAF). Information Gathering projects (IGPs) (46 are presently open). Stewart feels there is an opportunity if IGPs relate to TAP projects for there to be correspondence between SA and TAP. From an internal perspective, the IGPs should be shared with TAP management. They are receiving a lot of practitioner's compliance issues. The filing season numbers are up, long wait times on the TPS and its staffing and budget is driving that. There is some chatter over the practitioner priority hotline. IGP – there are type 1 and type 2. Idea is these issues are not ready for a project, but someone should take a look at them. Andrews will pull a monthly report and share with the committee.

Project Committee Focus – 2016

Andrews opens up conversation discussing the upcoming projects and writing of issue statements for 2016. Andrews's talks about how each project committee is unique. Tax Form and Publications are given projects the IRS needs help with. Notice and Communications follows the sometime whereas the TAC committee has issues that are created by the committee. Andrews speaks on the issues that Kim Stewart expounded upon about the TAC. Tying issues to the Tax Bill of Rights; we need issues that are impactful; don't get institutionalized on the fact that IRS has no money. Andrews says our mission is the taxpayer and that is our focus.

During the 2016 Project Committee Meetings Andrews states she cannot control the money but we will plan for whether we have the funds and will work around the Continued Resolution (CR) and budget environment. Meetings will take place in January for 2.5 days. Andrews wants to be strategic. Jerome Bell suggests meeting after the tax season. Andrews explains that historically meeting after the tax season was a disaster and the committee lost half a year. Staff passes on to the JC that the staff chose the second week in January. Andrews asks for their opinion. Allan Goldberg stated that the VITA/TCE volunteers have training the first two weeks in January. Discussion takes place about December and January meetings. VanSingel talks about contingency dates.

Action Item: Decision should be sent to the Project Committee Analyst, with a carbon copy to: Andrews, Swartz, and VanSingel by September 15, 2015.

Committee Discussions

Best practices or Ideas:

- Have a conversation with the TAP Analyst and the Chair before the meeting to go over everything concerning the meeting.
- Executive Working Meeting – To possibly have a working meeting before the actual meeting.
- Exit interviews for panel members.
- Mentoring from former members to new members.
- Would like the NTA to participate more with the TAP – attending the JC meeting.

Length of Meeting

Length of Meeting – change the meeting to 90 minutes rather than 60 minutes.

Action Item: The JC meeting will be 90 minutes long for the remainder of the year.

Inactive Members

Plan of Action – identify population of people who don't participate on the committees. The non-participating members should not be allowed to go to the face to face meetings.

TAP staff is looking to the JC for motivational items for the members, as well as how to engage the alternates, and deal with non-participating members.



Communicate with the members upfront. Let them know if they don't participate, they will be removed. The information should be shared during the virtual training. The progression was discussed.

Concerns for members who are active and working have the brunt of the work were discussed.

Action Item – Andrews will research by laws to see what options are to remove panel members.

Closing

Swartz closed the meeting.

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



**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
June 24, 2015**

Committee Management Official

- Bob Faber Committee Management Program Manager

Designated Federal Official

- Sheila Andrews TAP Director

Chair Members Present

- Michael Swartz National TAP Chair
- Andrew VanSingel National TAP Vice-Chair
- Mary Kautzman Chair, Tax Forms and Publications Project Committee
- Gina Jones Chair, Taxpayer Communications Project Committee
- Jeanne Matthews Chair, Internal Communications Committee
- Gretchen Cooney Chair, Toll-Free Phone Line Project Committee
- Nancy Dery Chair, Special Projects Committee
- David Hayes Chair, Notices and Correspondence Project Committee
- Allan Goldberg Chair, Taxpayer Assistance Center (TAC) Improvements Project Committee

Committee Members Present

- Ralph Bennett Member, Taxpayer Communications Project Committee
- Sean McPhilamy Member, Toll-Free Phone Line Project Committee

Staff Present

- Cedric Jeans Chief, TAP East
- Lisa Billups Senior Program Analyst
- Linda Rivera Senior Program Analyst
- Janice Spinks Senior Program Analyst
- Donna Powers Program Analyst
- Otis Simpson Program Analyst
- Theresa Singleton Program Analyst
- Toni Ross Program Analyst
- Carolyn Sanders-Walsh Senior Tax Analyst
- Tamikio Bohler Program Analyst, W&I
- Betty Scott Program Analyst, W&I
- Kevin A. Brown Management Assistant

Staff Not Present

- Susan Jimerson Chief, TAP West

Members of the Public



None

Welcome, Review Agenda

Michael Swartz welcomed everyone to the call and officially opened the meeting.

DFO/National Office Update/Sheila National Office Report

Sheila Andrews reported that we are at the end of the recruitment process and the interview portion should be completed by next week. Andrews indicated that using www.usajobs.gov increased the application count by 120 percent from last year. Andrews also reported that the JC face-to-face meeting will be held on August 4 and 5, 2015. Andrews encouraged the JC member who would could not attend to either send their vice chairperson or attend the meeting virtually.

Roll Call

Quorum met.

TAP Chair Report

Swartz encouraged the committee to make every effort to attend the meeting.

Approval of May JC Minutes

Swartz proposed to correct a chair report to show Goldberg instead of himself on May minutes. Allan Goldberg suggested Action Items at the end of the minutes to be easily identifiable. Minutes approved pending these suggested changes.

Public Comments

None

Project Committee Review/Activities

Special Projects – Chair, Nancy Dery

Nancy Dery reported that her committee is working on a letter alerting taxpayers abroad of how and where to receive help for tax issues along with reminding them of their responsibilities. Dery reported that the ID Theft committee is working an issue with IRS experts and will keep track of its progress. Dery also reported that the other subcommittee is working on the customer service representative complaints and/or compliments for both on the phone and in person contact.

Tax Forms and Publications – Chair, Mary Kautzman

Mary Kautzman reported that her committee is currently working three issues, two of which will be presented for elevation to the IRS for consideration. Issue number 3207 – Form 1139 *Corporation Application for Tentative Refund* and instructions was presented for submission. There were several changes with the verbiage and other corrections suggested by the committee for this referral. Some parts need to be cleared up and made into plain language and simple wording.



Action Item: It is indicated the referral submitted for JC review may have been an outdated version. Referral will be sent back to the committee.

Issue 33015 Publication 974 – *Premium Tax Credit (PTC)*

Action Item: Referral will be sent back to the committee to address items discussed by Joint Committee.

Taxpayer Communications – Chair, Gina Jones

Gina Jones reported her committee has two referrals in their quality review process at this time. They have received comments and will be fixed accordingly. The hope is to have these referrals ready for next month's July meeting.

Taxpayer Assistance Center Improvements – Chair, Allan Goldberg

Issue 32934 Publication 4012 – There were several comments received that they agree with a number of recommendations in the report by the IRS. There were minor corrections mostly cosmetic in nature.

Action Item: Referral is formally elevated to the IRS for consideration.

Goldberg reported that the committee is working to improve treatment of taxpayers turned away from TAC due to long wait times. The TAC is obtaining legal opinions on Volunteer Income Tax Assistance (VITA) volunteers being paid and yet not being subject to tax preparer rules. The committee is also working on the "Get Transcripts" section going down and hurting taxpayer's ability to do business. These issues have caused increased traffic to the TACs last month according to Goldberg.

Notices and Correspondence – Chair, David Hayes

Issue 24894 Notices CP2000 – David Hayes suggested that the wording be changed so this does not appear as a bill. Instead this notice should appear more like an amount that needs to be reviewed by the taxpayer. Goldberg suggested referring the Pub 5181 with this referral.

Action Item: Referral will be sent back to committee for review of several recommendations to include a reference to Pub. 5181.

Issue 17399 Payment due dates need to be altered – This referral is a review of forms that indicate payments are due on a particular due date. Goldberg suggested the form should state the specific date that the payment is actually due on to avoid how confusing the phrase "due by" can cause. This will make it clear to the taxpayer that the payment has to be made by a particular date. This suggestion was accepted and will be included in the referral.

Action Item: Referral will be elevated subject to the minor corrections.

Toll-Free Lines – Chair, Gretchen Cooney

Issue 32848 – Review and Improvement of EITC Examination Process.

The discussion regarding this referral is whether to footnote should be cited after an IRS regulation. The discussion continued about whether this referral should include a language change as their position.

Action Item: Referral will be tabled until another time to determine the validity of the suggested changes.

Issue 32849 – Review and Improvement of EITC Examination Process Script
Swartz recommended elevating this referral to the IRS as presented.

Action Item: Referral elevated to IRS.

Action Item: Language issue will be reviewed and a separate issue will be created if necessary.

Internal Committee – Chair, Jeanne Matthews

- Internal Communications – Chair Jeanne Matthews inquired if the internal committee recommendations have to go through the same approval process like IRS referrals. The JC makes internal changes/updates with no other approvals needed. Matthews indicated she would send out pre-reads to members before the next JC meeting.
- Inactive members – Dery and Hayes reported they were able to bring a couple members back into the fold. One person was sent a certified letter and that is to be determined. Goldberg reported he has no inactive members. Cooney had issues with three people of which one person still has not responded. The next step is asking for a formal resignation from this individual. The staff will assist with this process. Andrews reported specifics in the bylaws about removing members going through the Secretary of Treasury and reasons why this can be done.

Closing

Swartz mentioned consideration should be given to schedule the meeting for an hour and a half since it seems to go over so consistently and finish early if it does not.

**Next meeting: July 29, 2015
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
May 27, 2015**

Designated Federal Official

- Sheila Andrews TAP Director

Members Present

- Michael Swartz National TAP Chair
- Andrew VanSingel National TAP Vice-Chair
- Mary Kautzman Chair, Tax Forms and Publications Project Committee
- Jerome Bell Vice-Chair, Taxpayer Communications Project Committee
- Jeanne Matthews Chair, Internal Communications Committee
- Dan Halleman Vice-Chair, Toll-Free Phone Line Project Committee
- Nancy Dery Chair, Special Projects Committee
- David Hayes Chair, Notices and Correspondence Project Committee
- Allan Goldberg Chair, Taxpayer Assistance Center (TAC) Improvements Project Committee

Members Absent

- Gina Jones Chair, Taxpayer Communications Project Committee
- Gretchen Cooney Chair, Toll-Free Phone Line 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
- Janice Spinks Senior Program Analyst
- Teresa Cook Program Analyst
- Kim Vinci Senior Program Analyst
- Carolyn Sanders-Walsh Senior Tax Analyst
- Tamikio Bohler Program Analyst, W&I
- Betty Scott Program Analyst, W&I
- Kevin A. Brown Management Assistant

Members of the Public

None



Welcome, Review Agenda

Andrew VanSingel officially opened up the meeting.

Roll Call

Quorum met.

DFO/National Office Update

Sheila Andrews mentioned that the Joint Committee (JC) face to face two day meeting will be held the week of August 3, 2015. Jacksonville, Florida, is the location that we are pursuing currently. Other details are still being worked and will be provided when they become available. Otis Simpson spoke about the Self Mailers having prepaid postage added to them for submitters to mail issues to us. This has to go through the U.S. Postal Service which takes longer for approval. Currently, the request is still going through the approval process and we will continue to use the old forms until approved.

TAP Chair Report

N/A

Approval of April JC Minutes

The April 2015 minutes were approved for posting.

Public Comments

None

Project Committee Review/Activities

Notices and Correspondence – Chair, David Hayes

David Hayes reported their subcommittees are working on four older issues and have received two additional ones. They also have six new issues available for review and one in their parking lot. Finally, Hayes reported they have two issues that should be available for next month's JC meeting.

Tax Forms and Publications – Chair, Mary Kautzman

Mary Kautzman reported that they have a new member, Clarence Russo, who replaced William "Bob" Vetter. The IRS requested a review of form 974 *Premium Tax Credit (PTC)*, which is due in June, so we hope to get it to the JC next month. Kautzman said they are busy clearing their screening committee at this time. Swartz suggested that Kautzman circulate a draft to the JC giving members a chance to make comments or suggestions on the project prior to next month's meeting.

Taxpayer Assistance Center Improvements – Chair, Allan Goldberg

Goldberg brought up a project that included a list of recommendations to the IRS regarding Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) resource guides and training materials by the TAC committee. Swartz and Allan Goldberg



spoke about the JC approving the draft before it goes back to the Internal Revenue Service. The discussion continued about the time frame required for this project and the JC not having ample time to review the draft. Because the IRS already has the draft, the subject will be moved to next month for an official response from the committee.

Goldberg reported that the committee made between 15 and 25 suggested changes to the reviewed materials in an effort to improve them for taxpayer benefit. The committee found it necessary to request a one week extension, which was granted, but there was no time to provide this draft to the JC before sending it back to the IRS for consideration. Swartz mentioned that we hope the IRS accepts some of these changes and Goldberg requested that the IRS allow the JC to review the draft changes prior to sending them to print before next year's filing season.

Goldberg forwarded our concerns about the IRS rejecting our four recommendations to improve business e-filings and reduce the burden for truckers preparing, filing and paying the nearly one million forms 2290 to the TAP Communications committee for the annual report. The point is to highlight our differences with their assessment of our proposals.

Lastly, Goldberg reported that the initiative of requiring appointments at the walk-in centers to ensure that it benefits taxpayers.

Taxpayer Communications – Chair, Gina Jones

Jerome Bell reported that subcommittee A has two referrals being prepared for the next JC call. The referrals are: Individual Tax Assistant (ITA) and improved compliance for Schedule C filers. Subcommittee B has been working on form 433 F *Collection Information Statement* and will have a Subject Matter Expert (SME) from the IRS to assist in the review of this form during our next meeting.

Toll-Free Lines – Chair, Gretchen Cooney

Issue 32848 – Review and Improvement of EITC Examination Process.

Halleman reported that research showed that after office hours, weekends and holidays, the system would simply reply that the office was closed. A recommendation for information to be made available without a prompt to speak to a person was made for this issue.

Halleman reported that the background and analysis for these issues are relatively the same. Taxpayers would receive a notice CP 75 and a form 886-H-EIC, which informs them that their tax return has been selected for audit for clarification of their qualification for the earned income tax credit. The hope with the automated system is that individuals would be able to gain enough information to make a response without speaking to a live person. The National Taxpayer Advocate (NTA), Nina Olsen, determined that there were too many dropped calls due to lack of understanding or an inability to get through to a live person.

Issue 32849 – Review and Improvement of EITC Examination Process Script.



Halleman explained that the intention of this review was to ensure that the script was easily understood by any taxpayer who calls in for additional information. There were 13 individual recommendations to improve and simplify this script. The only thing the subcommittee did not include was a Spanish translation.

Swartz recommended that this referral go back to the committee due to inquiries on recommendation number 9 to be reviewed to ensure that the age information is correct before this referral can move forward. Additionally, Goldberg requested a language clarification regarding the statements, "...prove their claim..." or "...support their position..." in the wording.

Special Projects – Chair, Nancy Dery

Nancy Dery reported that the international subcommittee, while researching improvements to the website, noted that the IRS has already made some. They will continue to research this to see what other changes need to be made. Considerations are still be made to deal with the fact that all of the international IRS offices will be closed as of June 2015.

The ID Theft subcommittee is working on ways to speed up the process to ensure that the EINs match up with the company names and are not being used fraudulently. Dery reported that they are working on a new issue involving misconduct complaints, which will be led by Paul Lubell.

Internal Communications – Chair, Jeanne Matthews

Jeanne Matthews reported that the committee is still working on a new pocket guide and making it simpler to use. This project is expected to be presented to the JC next month. This is for members only and not intended for the public. In addition, the TAP brochure is still being reviewed by the committee and is expected to be ready for the JC next month.

The newsletter is still being worked on and is in publication form, but no one has been able to access this file at this time. Matthews mentions that the project is a bit more complicated than expected which is causing the delays and suggestions for completion would be helpful. Based on this being an internal project, some of this can be done offline and does not require a public meeting to complete. A deadline of May 29, 2015, will be the cutoff date for comments to get this project moving a bit faster.

Round Table

Swartz requested feedback on change to the screening committee procedures to allow a member to present an issue that was being discussed within another committee. This additional step would be purely a courtesy, but a good way to include the submitter of such issue. This item will be presented to all screening committees at this point.

Susan Jimerson reported that the Ad Hoc committee is finalizing the annual report and is now inquiring exactly when the decision had been made not to include graphics. The exact



date could not be determined, but the amount of graphics used throughout the years has consistently decreased.

That being said, Jimerson reported that other federal advisory committees get their reports out earlier and do so with limited graphics within their reports. Jimerson also highlighted the fact that fewer graphics would give us the opportunity to focus more on the issues that were not approved by the IRS and this might make the report much more effective moving forward. Swartz mentioned this would be a great topic during the upcoming JC face-to-face meeting to make sure we can get a professional annual report out timely.

Andrew VanSingel has been reviewing the Panel's activity levels and has focused on members who have not participated in any TAP activities. The goal is to get the members back onboard or to resign to be able to get replacement members. Phone calls, emails and finally a letter are being recommended to achieve this goal.

Swartz mentioned that by next month all chairpersons should have a report that they have pulled the member back in, received an official resignation or started the procedure of dismissing these individuals. The hope is to allow these members to become active to help TAP achieve its goal.

Jimerson reported that a message will be sent to the committee chairs and vice-chairs along with an additional date request before we can finalize the date for the JC face-to-face meeting.

Closing

Swartz thanked everyone for their participation and officially closed the meeting.

**Next meeting: June 24, 2015
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
April 29, 2015**

Designated Federal Official

- Sheila Andrews TAP Director

Members Present

- Michael Swartz National TAP Chair
- Andrew VanSingel National TAP Vice-Chair
- Mary Kautzman Chair, Tax Forms and Publications Project Committee
- Gina Jones Chair, Taxpayer Communications Project Committee
- Jeanne Matthews Chair, Internal Communications Committee
- Gretchen Cooney Chair, Toll-Free Phone Line Project Committee
- Nancy Dery Chair, Special Projects Committee
- David Hayes Chair, Notices and Correspondence Project Committee
- Allan Goldberg Chair, Taxpayer Assistance Center (TAC) Improvements Project Committee

Staff Present

- Susan Jimerson Chief, TAP West
- Cedric Jeans Chief, TAP East
- Donna Powers Program Analyst
- Lisa Billups Senior Program Analyst
- Linda Rivera Senior Program Analyst
- Theresa Singleton Program Analyst
- Teresa Cook Program Analyst
- Carolyn Sanders-Walsh Senior Tax Analyst
- Tamikio Bohler Program Analyst, W&I
- Cindy Jones Manager, W&I
- Kevin A. Brown Management Assistant

Members of the Public

None

Welcome, Review Agenda

Michael Swartz welcomed everyone to the call and officially opened up the meeting.

Roll Call

Quorum met.



DFO/National Office Update

Sheila Andrews reported that TAP received 1086 applications for volunteers who want to become a new TAP member. We will begin the interview phase late May to early June and would like to have current TAP members as part of the interview panel. A solicitation will be sent in a few days to solicit members to join the interview panels.

TAP Chair Report

Swartz reminded the committee that we have a full agenda and started the meeting.

Approval of February and March Joint Committee (JC) Minutes

The February and March 2015 minutes were approved subject to several typographical errors being corrected. The corrected minutes will be circulated to the committee when completed.

Public Comments

None

Project Committee Review/Activities

Notices and Correspondence – David Hayes

David Hayes reported that his screening committee is working on their parking lot issues and bringing forth any issues that will come from that source. Hayes mentioned that several parking lot issues have been combined into issue number 24894 concerning CP 2000 corrections and should be available for the May JC meeting. Hayes also noted that they are making progress on form CP 161, regarding 941 taxes, penalties and to simplify things for the taxpayer.

Issue 29543 – Clarify Estimated Payment Wording on Form 4868

Van Singel reported that this referral is an attempt to make it easier to understand how to apply for an extension. The referral wants to make it clear that if you send an electronic payment, that in and of itself, acts as an extension request, which requires no additional paperwork to request an extension. VanSingel mentions that the new verbiage makes the options to file for an extension much easier than the present form. Alan Goldberg inquired about the time frame needed to have this referral considered before the next filing season. VanSingel suggested that this question be added into the referral for further guidance. Cedric Jeans mentioned that the authors of this form be contacted directly to have the question answered as soon as possible.

Consensus: To elevate to IRS.

Tax Forms and Publications – Chair, Mary Kautzman

Mary Kautzman reported that progress was made on their issue 32077 for form 1139 *Corporation Application for Tentative Refund*; this referral will be ready for next month's JC meeting. There are a few projects regarding Spanish interpretations that are going to be addressed in the near future, reported Kautzman.



Taxpayer Assistance Center Improvements – Chair, Allan Goldberg

Allan Goldberg highlighted the committee is taking on an additional Ad Hoc assignment. The IRS Customer Assistance Relationships and Education function has asked the committee to review various education publications and training materials that the Tax Counseling for the Elderly (TCE) and Volunteer Income Tax Assistance (VITA) partners rely upon when assisting taxpayers. The committee is in the process of delivering a list of recommended changes to those reference materials in advance of the 2016 filing season.

Goldberg announced that the TAP leadership has agreed to take on an issue concerning the handling of taxpayer practitioner complaints that do not rise to the level of a 1203 violation. This issue was presented by the TAC committee which involved alleged rude, discourteous, or inappropriate behavior by IRS employees. The TAP Special Projects committee will do the research on this issue. The TAC committee will submit a briefing paper to supplement the initial submission to offer a historical perspective and to share some real life examples to assist the committee in their research.

Taxpayer Communications – Chair, Gina Jones

Gina Jones reported that the last committee meeting focused on their screening projects. The committee is currently working on “reducing taxpayer burden” which is a project assigned by the IRS and is the heading these projects fall under. Jones reported on issue 28923, centralization of offices created communication void, which the committee voted to transfer over to the TAC committee to be reviewed and possibly worked.

Jones reported that issue 29847, American Opportunity Tax credit tool referral, was changed, by the IRS, from rejected to under consideration. It will be in the next assessment cycle. Jones reported another issue concerning ID Theft also being placed under consideration by the IRS with a follow-up for January of 2016. Jones reported that issue 29732, regarding the Simplified Home office Deduction, in which four issues were accepted fully, one is under consideration and one was declined. The issue that was declined was our request to provide a link to the CP 575 to which the IRS responded it is very unlikely that this notice would be updated.

Toll-Free Lines – Chair, Gretchen Cooney

Gretchen Cooney reported that the committee is still working on the EITC audit verbiage; it is close to being done. It is under final review and then to the attorneys for review before coming to JC afterwards.

Special Projects – Chair, Nancy Dery

Nancy Dery reported that the ID Theft subcommittee is working on a couple of issues. One issue is linking the IRS database to the SSA database to limit fraud from using deceased social security numbers to file fraudulent returns. The second issue is involves trying to establish a system that could make sure that the EINs or SSNs are valid on W-2 forms. This issue is currently being reviewed. During the committee’s May 6, 2015, meeting, there



will be a speaker from W & I to hopefully provide some answers to questions about our project. The committee will be attending an IDT webinar on May 5, 2015, by the stakeholder liaison.

Dery reports that the International subcommittee is working on a project to make it easier access on the web for international tax issues. Part of this project is adding a drop-down bar titled "International Tax Issues" on the www.irs.gov homepage and having a summary page for such issues.

Internal Communications – Chair, Jeanne Matthews

Jeanne Matthews reported that the committee had their first meeting last month. During this meeting, Susan Jimerson explained the role of the committee and the changes that have been made to some of the committee responsibilities. An Ad Hoc committee has been tasked to work specifically on the annual report for both last year and the current year to get these projects done in a more timely fashion.

Matthews reported that the committee is currently working on the newsletter and redesigning the TAP brochure. This project is starting from square one, which makes this a bit harder to complete, but the hope for the committee is to accurately document our progress on this project. A representative from C&L gave guidance for the committee to have a starting point for all of the redesigning projects that we are working on. The committee has started working on redesigning the TAP pocket guide and will use the guidance from C&L and a simple red, white and blue color scheme to complete this project.

In the meeting pre-reads we included a letter to the chairman which we plan to send out each month, but the dates have to be corrected. Suze Kanack corrected the date to be May 10, 2015 for a request of a one page, no more than 250 words, about what each committee has been working on for the newsletter. In the past the newsletter was disseminated via email, but now we will send it out via www.tapspace.org and through Facebook. The information is the most important part of this project, so the hope is that each chairperson gets this to the committee so that we can get this project out for the entire Panel. Halleman requested that the reports be in Word format and attached to email when sent for the newsletter.

Screening Issues Received From TAP Members

Goldberg raised the issue of allowing the initiator of an issue, if they are from a different TAP committee, be able to attend the screening meeting for issues outside of their committee. The purpose of this request is to allow that person to provide background and context around the matter. This is a way to ensure all aspects under review are communicated and the member bringing this issue up can be available to answer any questions that may arise about the issue. Goldberg's request is to make this procedure part of TAPs guidelines.



The committee had dialogue pertaining to the specifics of such an instance and how this member would be involved once the committee has come to a conclusion.

Action Item: A request to draft procedures for the JC to review and consider will be completed by Goldberg for next month's meeting.

Round Table

None

Closing

Swartz thanked everyone for their participation and officially closed the meeting.

Next meeting: May 27, 2015

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 25, 2015**

Designated Federal Official

- Sheila Andrews TAP Director

Members Present

- Andrew VanSingel National TAP Vice-Chair
- Mary Kautzman Chair, Tax Forms and Publications Project Committee
- Gina Jones Chair, Taxpayer Communications Project Committee
- Suze Kanack Chair, Internal Communications Committee
- Gretchen Cooney Chair, Toll-Free Phone Line Project Committee
- Nancy Dery Chair, Special Projects Committee
- David Hayes Chair, Notices and Correspondence Project Committee
- Alan Goldberg Chair, Taxpayer Assistance Center (TAC) Improvements Project Committee
- Mahendra (MG) Patel Member, Tax Forms and Publications Project Committee
- LeAnna Wilson Member, Tax Forms and Publications Project Committee
- Joan Prober Member, Notices and Correspondence Project Committee
- Ralph Bennett Member, Taxpayer Communications Project Committee

Members Absent

- Michael Swartz National TAP Chair

Staff Present

- Susan Jimerson Chief, TAP West
- Cedric Jeans Chief, TAP East
- Donna Powers Program Analyst
- Lisa Billups Senior Program Analyst
- Theresa Singleton Program Analyst
- Teresa Cook Program Analyst
- Carolyn Sanders-Walsh Senior Tax Analyst
- Tamikio Bohler Program Analyst, W&I
- Kevin A. Brown Management Assistant

Members of the Public

None

Welcome, Review Agenda

Andre VanSingel welcomed everyone to the call and officially opened up the meeting.



Roll Call

Quorum Met

National Office Update

Sheila Andrews thanked everyone for all of their hard work. Andrews reminded everyone that we are in the recruitment period to replace members who will be retiring after this year. Andrews reported that we have received 538 applications in the first two weeks and she encouraged all members to spread the word. We were asked to be involved in Business Affordable Care Act (ACA) test and we need to figure out if we want to be involved. Our confidentiality agreement allows us to be a part of this test as none of this information is open for public disclosure. Andrews mentioned that we are planning chair training in April for chairs and vice chairs with more to come later.

TAP Chair Report

VanSingel reminded the members that according to the new outreach procedures, the reports are now due on the twenty-fifth of each month and should be turned in today. VanSingel also reminded the committee that the TAP recruitment season has begun and will be open to April 20, 2015. Theresa Singleton responded to VanSingel that she is in the process of establishing the ad hoc committee for the annual report. VanSingel encouraged those who are mentors to reach out to their mentees to get the new member acclimated into the Panel and how things are done.

Approval of February 25, 2015 JC Minutes

The February monthly minutes will be tabled for next month due to suggested changes.

Project Committee Review/Activities

Notices and Correspondence – Chair, David Hayes

The screening committee report has been reviewed and they are considering four items. The parking lot should be cleared by next month according to Hayes. Issue 24894, the CP 2000 letter is still being worked in an effort to make it appear more like an inquiry and less like a bill. Hayes reported that they have a project to deal with old issues or cast them to the side should be presented to next month's JC committee.

Hayes reported that they are working on new issues concerning letters 5043, 5044 and 5045, which came from headquarters, have been placed in subcommittees. These will be presented to our full committee soon. Hayes reports that the new outreach forms and procedures are being implemented throughout the committee and appears to be working well.

Tax Forms and Publications – Chair, Mary Kautzman

1. Issue 32076 Form 8621 – No recommendations needed at this time.

Action Item: The committee has accepted the no action recommendation at this time.

2. Issue 32122 Form 4797 – 11 recommendations: adding Appendix A, B and C. Goldberg questioned whether consideration was given to the publications associated with the form as it relates to the suggested changes to the form to be sure we are complete with our recommendations. Kautzman responded that the committee considered both the taxpayers that would benefit from these suggested changes and the publications associated with the forms. An addendum was suggested to the referral to state if accepted the relevant changes to the form would have to apply to the publication associated with the form also by VanSingel. Cedric Jeans and Donna Powers noted that it is common for the IRS to consider recommendations to a form and all associated documents, so this issue may be covered in the actual referral already.

The suggestion of adding the addendum to look into all related publications to avoid any inconsistencies was suggested by VanSingel has been made along with several grammatical fixes.

Action Item: Subject to minor grammatical errors and changes in the language, this referral is approved by the Joint Committee.

3. Issue 32077 Form 1139 – There were 10 recommendations to this form covering several areas: the caution boxes and their clarity; the processing of the application; the instructions on what to attach to the form; the readability; and the order as it was presented on the form.

Cooney made several grammatical, cosmetic and consistency recommendations to this referral.

Action Item: In an interest to generally improve the referral, the Joint Committee is sending this back so that it can be refined.

Kautzman and Cooney will work offline to see that the referral is cleaned up. Goldberg suggested having all referral sent to the JC at least three business days prior to the meetings.

Taxpayer Assistance Center Improvements – Chair, Alan Goldberg

Goldberg reported that this committee continues to work on ways the Taxpayer Assistance Centers can better serve taxpayers. They have two subcommittees working ways to alleviate the staffing and budget shortfalls faced by the TACs serving taxpayers. One committee is looking at how technology offered by virtual service deliveries along with what services can be provided through these formats. The IRS has received our comprehensive research questions and we will be reviewing those responses in the next couple of weeks to assist in our upcoming referrals.

Goldberg reported that a second subcommittee is looking at ways the Tax Counseling for the Elderly (TCE) and Volunteer Income Tax Assistance (VITA) partners can be more effectively utilized to meet more taxpayer needs. This subcommittee is seeking ways to



promote free tax preparation services while recruiting and retaining critical volunteer resources is making progress.

Goldberg mentioned that the IRS is reconsidering their response to our recommendations to form 2290 *Heavy Highway Vehicle Use Tax Return*, which we sent to the IRS last year. They have also arranged an up to date briefing on the IRS initiative to test taxpayer appointment at select TACs at our next full committee meeting.

Taxpayer Communications – Chair, Gina Jones

The IRS has responded to the recommendations we made on the Fresh Start Initiative recently. Two of the four recommendations were accepted. They declined the automatic removal of lien due to budgetary constraints. We requested zero user fees be implemented for an installment agreement if the taxpayer fell below the poverty level which was declined. This decision is not for the IRS to make, because OPM is responsible and refuses to budge on this topic. The “Not Collectible” status inclusion was accepted by the IRS per our request. Considering the name, we recommended the name stay the say since it is a fresh start for taxpayer and the IRS agreed.

Toll-Free Lines – Chair, Gretchen Cooney

They are still working on the call tree and hope to present this recommendation on the JC next call.

Special Projects – Chair, Nancy Dery

Dery reports that the international subcommittee is making a request to include an international taxpayer section on the drop down menu on the www.irs.gov homepage. The intention is to make it easier to get to issues concerning international taxpayers. We hope to present this next month. The ID Theft subcommittee continues to work on a couple of topics to get referrals in very soon.

Internal Committee/Staff Updates

None

Public Comments

None

Closing

VanSingel thanked everyone for their participation and officially closed the meeting.

**Next meeting: April 29, 2015
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
February 25, 2015**

Designated Federal Official

- Sheila Andrews TAP Director

Members Present

- Michael Swartz National TAP Chair
- Andre VanSingel National TAP Vice-Chair
- Mary Kautzman Chair, Tax Forms and Publications Project Committee
- Gina Jones Chair, Taxpayer Communications Project Committee
- Suze Kanack Chair, Internal Communications Committee
- Gretchen Cooney Chair, Toll-Free Phone Line Project Committee
- Nancy Dery Chair, Special Projects Committee
- David Hayes Chair, Notices and Correspondence Project Committee
- Alan Goldberg Chair, Taxpayer Assistance Center (TAC) Improvements Project Committee

- Mahendra (MG) Patel Member, Tax Forms and Publications Project Committee
- LeAnna Wilson Member, Tax Forms and Publications Project Committee

Staff Present

- Susan Jimerson Chief, TAP West
- Cedric Jeans Chief, TAP East
- Linda Rivera Senior Program Analyst
- Donna Powers Program Analyst
- Lisa Billups Senior Program Analyst
- Theresa Singleton Program Analyst
- Teresa Cook Program Analyst
- Carolyn Sanders-Walsh Senior Tax Analyst
- Tamikio Bohler Program Analyst, W&I
- Kevin A. Brown Management Assistant

Members of the Public

None

Welcome, Review Agenda

Michael Swartz welcomed everyone to the call and officially opened up the meeting.



Roll Call

Quorum Met

National Office Update

Sheila Andrews introduced three new staff members: Janice Spinks, Retha Blumhagen and Teresa Cook, all on details with TAP for a while. Andrews also announced that Steven Berkey has been promoted and has taken a new position within Systemic Advocacy, but remains within the Taxpayer Advocate Service should we need to seek his counsel. Andrews reported that during this filing season the Internal Revenue Service (IRS) is answering telephones inquires at a rate of about 60%, which is higher than the IRS anticipated at this time giving the budget changes. Andrews reminded the Panel that we want to continue to pay attention to issues like the phones being answered and appointments being made so that we are able to still advocate for taxpayers who have existing issues.

Andrews reported that the National Taxpayer Advocate (NTA) was on Capitol Hill testifying to congress on various taxpayer issues and the Panel should be aware of this. Andrews also reported that due to an administrative issue and the weather problems, there would be three committees that will not be open next month. This issue is being corrected and the staff will be working with these committees to see what can be done despite these meetings not being open next month.

TAP Chair Report

Swartz spoke about all of the committees starting out very productive and we are looking forward to getting referrals moving forward very soon. Swartz also reported that if any of the Panel members have issue with some of the staff, they should be specific and report the incident to him so that it can be addressed immediately.

Approval of November 26, 2014, and January 28, 2015, JC Minutes

Swartz recommended accepting the minutes with minor typos. Nancy Dery made a correction regarding her report for the Special Projects committee. The minutes for November 2014 and January 2015 were approved, with the suggested corrections.

Project Committee Review/Activities

Notices and Correspondence – Chair, David Hayes

Hayes reported that the committee is working to finalize referral for form CP 2000. Hayes also reported that they will focus on addressing all of their old issues right now and then work on new issues in March. Hayes reported that they are putting together various pro forma outreach newsletters, PowerPoints and ideas that can be used. Hayes also reported that the mentors are working with their mentees preparing for a very productive year.



Hayes mentioned that those tasked with communicating with issue submitters are doing a very good job ensuring that the issues we have are complete when presented. Hayes says that one of the best sources of issues continues to be through meetings with the Local Taxpayer Advocates (LTA). These meetings are also very helpful to our congressional contacts and shows TAP in a very good light.

Tax Forms and Publications – Chair, Mary Kautzman

Kautzman reported that although they will not have an open meeting next month, they are making progress on several referrals. Specifically they have written referrals for forms: *4797 Sales of Business Property* and *1139 Corporation Application for Tentative Refund*. They are still working on a third issue that requires further discussion. Donna Powers added that the committee actually has all three referrals completed and ready to be presented once an open meeting is able to be conducted. Kautzman reported that LeAnna Wilson has volunteered to be the Internal Communications coordinator for this year.

Kautzman inquired about www.tapspace.com to find out when/if it would be available to the Panel. Powers reported that Kim Vinci continues to work with Weber Shandwick to fix this issue. The committee will be kept abreast of the progress of this project.

Taxpayer Assistance Center Improvements – Chair, Alan Goldberg

Goldberg reported that his committee continues to work on the issues developed during the face-to-face meetings. Their two subcommittees are working on helping the IRS meet the staff and budget shortages it is currently dealing with at the walk-in centers.

One committee is researching how the IRS can employ technology offered by virtual service deliveries to improve and expand on opportunities to assist taxpayers in meeting their tax obligations as well as account issues they may face while trying to do so. The other committee is looking at how Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) partners can be utilized to meet more taxpayer needs. This research continues and is being used to present a dialogue with the IRS to brainstorm about possible resolutions for taxpayers and their need for tax assistance. Goldberg spoke of the test of making appointments at TACs to see if this could benefit taxpayers by reducing wait times and avoiding being turned away.

Goldberg mentioned that this recommendation was made to the IRS to assist in processing Individual Taxpayer Identification Number (ITIN) applications more efficiently last year. The recommendation was rejected and now it appears the IRS has reconsidered our proposition since they are now testing this procedure out. With that said, Goldberg suggested that TAP should be commended for referring such an initiative early on.

Goldberg mentioned that they are arranging an operational visit at the TAC in Austin, Texas to conduct an informal survey with taxpayers to see how this new procedure is working for the public. Goldberg reported that the reconsideration for our ITIN proposal is still awaiting



a response from the Internal Revenue Service. There is also a pending response for the four recommendations on form 2290 *Heavy Highway Vehicle Use Tax Return*, which we sent to the IRS last year.

Swartz inquired if the IRS has responded at all in the last few months to any of TAP's recommendations. Andrews mentioned that since Russ Pool retired we have new staff members taking on this task. Otis Simpson will be forwarding the IRS response to the recommendations made on form 2290 to the committee very soon. In addition, Andrews mentioned the staff is following up on any and all responses that may have been received from the IRS and those responses will be submitted to the committee as quickly as we can.

Taxpayer Communications – Chair, Gina Jones

Jones reported that, while they are not able to have an open meeting this month, they are working with staff and program owners to get a more detailed assignment from the IRS. Jones indicated that they have four primary issues that were given to them to work on to include the first issue was to review the interactive tax assistant (ITA) on the www.irs.gov website. The second issue was the self-employed which the IRS has worked on in the past with a schedule C initiative and an entrepreneur initiative. Jones said they have requested the information on the initiatives to be used in the committee's work reducing duplication.

Jones reports that the third issue they will be working is how to reduce taxpayer burden by improving the taxpayer experience. This project is expected to result several different referrals from the committee. The last issue will be to review Form 433-F *Collection Information Statement*. Jones reported that they will focus a lot on their screening committee for their April meeting since they have done a lot of work that has to be moved forward during an open meeting.

Jones reported that the American Opportunity Tax Credit look up tool is their only remaining carry over issue from 2014 which was a good idea that could not be implemented due to budget constraints. The committee has since completed a cost analysis and this issue is going back to the IRS for reconsideration.

Toll-Free Lines – Chair, Gretchen Cooney

Cooney stated that the committee is working on the Earned Income Tax Credit (EITC) audit script that people hear if they call in in response to being audited. The first subcommittee reviewed the flow of the process through the calling tree, which has been completed. The second subcommittee reviewed the verbiage and a report was drafted by both and sent back to the Internal Revenue Service. Cooney reported that the screening committee will be able to respond to new issues during their next open meeting.

Special Projects – Chair, Nancy Dery

Dery reported that during their last subcommittee meeting they were notified that they have a project manager for international affairs, who has not been identified just yet. The



committee is still having problems with TACs in London, Paris and Germany being closed. An attempt is being made to see what the embassies in those countries can do to assist taxpayers as a result. Many of these taxpayers are calling or attempting to call for assistance through our toll-free lines, which may or may not be toll-free for them since they are out of the country. This issue remains a very important issue that we will continue to work.

Dery mentioned that the subcommittee handling the ID theft issue is now looking at how some states are handling this issue to see if this can help resolve the issue on a federal level. Research is still being conducted to find out what previous TAP committees have done to address this issue and to avoid duplication. There is a question as to should this committee be broken up into two separate committees, one for individual and one for business ID theft issues.

Dery informed the committee that Sophia Sakoff has volunteered to work on the Internal Communications committee.

Internal Committee/Staff Updates

- Internal Communications

Swartz reported that the Internal Communications committee is newly formed and those who are a part of this committee will be contacted soon about the specifics.

- Activity Report

Cedric Jeans reported that there were some changes made to this report to make it easier and more user friendly. This will be known as the "activity report" instead of the "outreach report." In addition, some cosmetic changes were made to the form to simplify it and the reporting period now ends on the twenty-fifth of each month. This will allow the members submit their reports by the end of the month to the activity report analyst. Once the reports are submitted Kudiratu Usman, the activity report analyst, will consolidate them, hopefully before the committee's next meeting.

Action Item: The committee has accepted this procedural change and the changes to the form effective the month of March.

Jeans encouraged the members to take a survey about the face-to-face meetings from January to help improve next year's meetings.

- TAP Annual Report Ad Hoc Committee

Andrews spoke of how we can revise the "Speak Up" brochure and completing the annual report. Andrews proposed creating an Ad Hoc committee to finalize the 2014 TAP annual report and another to start the 2015 report in order to complete these projects more efficiently. The purpose for these changes is for us to complete these tasks in a more timely fashion.



Action Item: The committee has accepted the addition of an Ad Hoc committee for the TAP annual reports.

- Small Business Self Employed (SBSE) Outreach initiative

Carolyn Sanders-Walsh offered TAP access to the SBSE outreach initiative database through the committee analysts. This database contains approved outreach materials for SBSE as a tool to help them reach out to stakeholders. The next tool is the Communications and Stakeholder Event calendar which contains all of their outreach events to include what will be discussed at these events.

Because of security reasons, the Panel can request the information and their analyst would go into these tools and find all related materials on the subject that the Panel is looking for. Sanders-Walsh has set up a meeting to show the TAP staff how these tools work so that they can understand how to use them to help TAP with their outreach needs.

Public Comments

None

Closing

Swartz thanked everyone for their participation and officially closed the meeting.

Next meeting: March 25, 2015

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
January 28, 2015**

Designated Federal Official

- Sheila Andrews TAP Director

Members Present

- Michael Swartz National TAP Chair
- Andre VanSingel National TAP Vice-Chair
- Mary Kautzman Chair, Tax Forms and Publications Project Committee
- Gina Jones Chair, Taxpayer Communications Project Committee
- John Slough Vice Chair, Notices and Correspondence Project Committee
- Suze Kanack Chair, Internal Communications Committee
- Gretchen Cooney Chair, Toll-Free Phone Line Project Committee
- Nancy Dery Chair, Special Projects Committee

Members Absent

- David Hayes Chair, Notices and Correspondence Project Committee
- Allan Goldberg Chair, Taxpayer Assistance Center (TAC) Improvements Project Committee

Staff Present

- Susan Jimerson Chief, TAP West
- Cedric Jeans Chief, TAP East (acting)
- Linda Rivera Senior Program Analyst
- Donna Powers Program Analyst
- Kim Vinci Senior Program Analyst
- Robin Owsley Program Analyst
- Lisa Billups Senior Program Analyst
- Theresa Singleton Program Analyst
- Annie Gold Management Assistant
- Kevin A. Brown Management Assistant
- Sanders-Walsh, Carolyn Senior Tax Analyst

Members of the Public

None

Welcome, Review Agenda

Michael Swartz welcomed everyone to the call and officially opened the meeting.



Roll Call

Quorum Met

National Office Update

Sheila Andrews reported that the face-to-face meetings were an overall success despite the many challenges that were faced. Andrews also reported that the National Taxpayer Advocate, Nina Olsen, released the Annual Report to Congress (ARC) during the week of our face-to-face meetings. The ARC has received a lot of attention and is available for review, which all members are encouraged to review. Andrews reported that Steve Berkey will be back at the end of February and will take over the Joint Committee (JC); Robin Owsley's detail will be ending next week. Andrews reported that Otis Simpson will be taking over the Taxpayer Assistance Center Improvements (TAC) project committee.

TAP Chair Report

Michael Swartz mentioned that we need to set the times for the JC monthly meetings.

Action: The meetings going forward will be the last Wednesday of the month at 1:00p.m. Eastern Standard Time.

Project Committee Review/Activities

Notices and Correspondence – Chair, David Hayes

The Vice Chair, John Slough, reported that all minutes were reviewed and approved. They have assigned mentors to the new members. The committee formed two subcommittees and divided all remaining issues from last year, along with the new issues, between the two. The CP2000 notice is one of the old issues being reviewed and will be responded to at a later date.

Tax Forms and Publications – Chair, Mary Kautzman

Kautzman reported that they also formed subcommittees and had three issues that were addressed at the face-to-face meetings. The first issue was concerning Pub 17 *Your Federal Income Tax (For Individuals)* and how compatible it is for hand held devices such as the iPhone or the iPad. This issue is still ongoing. The next issue was on Form 8965 *Health Coverage Exemptions*, where the committee attempted to complete the forms and found it a bit challenging. The next issue was Form 8962 *Premium Tax Credit*. The form was easier and friendlier than its prior version

Kautzman reported that they have three projects that they are currently working. The first project is on Form 1139 *Corporation Application for Tentative Refund*, which will be just a general review of the form and instructions. The second project will be on Form 4797 *Sales of Business Property*, which is expected to be a much larger project. The third project is on Form 8621 *Information Return by a Shareholder of a Passive Foreign Investment Company or Qualified Electing Fund*, which will be general review. All three of these projects have a rather short timeline and will need to be reviewed soon. Swartz and Kautzman reminded



the committee that forms and publications can be reviewed by any member of TAP and this feedback should be forwarded to the committee chair, Kautzman.

Taxpayer Assistance Center Improvements – Chair, Alan Goldberg

Swartz gave a report which he received from Alan Goldberg regarding their face-to-face meetings. The IRS has asked the TAC to develop alternatives to costly face-to-face tax assistance as IRS resources and staffing continues to dwindle at walk-in offices and elsewhere. Last year this committee made suggestions for individuals seeking assistance in getting Taxpayer Identification Numbers (TIN) and filing and paying Form 2290 *Heavy Highway Vehicle Use Tax Return*, as a way to alleviate taxpayer burden and reduce service costs in this area.

Goldberg reported that the Wage and Investment (W&I) division of the Internal Revenue Service has asked us to look for ways to maximize virtual service delivery and to seek ways of making increased use of volunteer services at Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) sites. Swartz reported that two subcommittees have been formed, one to look and how improved technology can leverage IRS resources and improve efficiency in lieu of time consuming TAC visits. The second subcommittee will study how to guide eligible taxpayers to VITA and TCE resources to better manage the volunteer operations.

Swartz reported that the committee was able to meet with and speak to project managers and subject matter experts allowing them to jump start their project work. Outreach efforts, where and how to seek partnerships in and outside of the IRS and the importance of issue development were also discussed during these meetings.

Taxpayer Communications – Chair, Gina Jones

Jones stated the committee did a general review of all of the issues currently being worked and almost all of them are passed the JC and awaiting a response from the IRS which is a good thing. We had one referral come back from the IRS as a good idea and had merit, but was rejected due to budget constraints. We have prepared a cost effectiveness response which will be submitted to the IRS for reconsideration soon.

Jones mentioned that the parking lot was reviewed and is still being considered at this time. This committee has been split into two subcommittees and each will share the four issues given to us by the IRS for advisory feedback. The first issue was to review the interactive tax assistant (ITA) on the www.irs.gov website. This is currently being done now. The second issue was to improve the filing and payment compliance with schedule c filers. This will be done mostly through marketing and education. The first goal was to find the actual target audience for this information.

Jones reports that the third issue they will be working is how to reduce taxpayer burden by improving taxpayer experience. This is expected to be a very large project with perhaps



multiple referrals to come. The next issue, which is from the parking lot, the committee has is concerning wrong telephone numbers on IRS notices sent to taxpayers. Both of these issues will be combined and the referrals will go up together. The last issue will be to review Form 433-F *Collection Information Statement*, to see if this form can be made easier and reduce taxpayer burden. Jones also mentioned that while working these current issues, we still have to keep collecting issues for future processing.

Toll-Free Lines – Chair, Gretchen Cooney

Cooney stated the committee was asked by the Earned Income Tax Credit (EITC) audit group to review the verbiage on their phone tree. During the face-to-face meetings, the committee was able to meet with the EITC personnel requesting the review, which made it easier to start working. Cooney reported that they formed two groups to complete this task. The first groups worked on the flow of the phone tree to address how callers can navigate to their required destination. The second group worked on the script on the phone system. The committee will rewrite the script and submit it as a referral.

Cooney reported that the committee will be making a decision on a referral that was rejected by the IRS last year and they will decide how or if to proceed with it soon. Swartz mentions that the JC committee can assist if there are members who need to be encouraged to participate in TAP business if it becomes a challenge.

Special Projects – Chair, Nancy Dery

Dery reported that they have formed two subcommittees to address their issues. The ACA and ID Theft are two of the issues their subcommittees will be addressing. The first they are working on is trying to get one IRS person to work an individual's problem instead of it always being a different staff member each time a taxpayer calls. This issue is currently being addressed. Internal issues are also being worked by the committee.

Dery reported that the international Panel member, Shelby Lyons, is trying to attend the tax forum held in Paris, France to find out more about the IRS no longer providing tax free offices in foreign countries. This presents several issues with budget cuts be made to reduce phone lines yet the phone coverage is supposed to be increased to handle these foreign offices being closed.

Internal Communications Committee – Suze Kanack

Kanack made the committee aware that she will not be able to function as the chair for this committee and this should give someone else a chance to get some experience. Kanack did mention that she still wants to keep working the TAP newsletter. Andrews reported that a new chair will be selected sometime in the near future.

Public Comments

None



Closing

Swartz thanked everyone for hitting the groups running and thanked Lisa Billups for all of her efforts in the short time she served with the committee. Swartz mentioned that all issues received both from the IRS as well as taxpayers are equally important and should be worked that way as it all serves to improve the IRS for taxpayers.

**Next meeting: Wednesday, February 25, 2015
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.