



2017 Meeting Minutes Joint Committee (JC)

- Nov. 29, 2017
 - Nov. 17, 2017
 - Oct. 25, 2017
 - Sept. 27, 2017
 - Aug. 30, 2017
 - Aug. 22-23, 2017
 - July 26, 2017
 - June 28, 2017
 - May 31, 2017
 - April 26, 2017
 - March 29, 2017
-

Joint Committee Taxpayer Advocacy Panel (TAP) Meeting Minutes Nov. 29, 2017

Designated Federal Official (DFO)

- Cedric Jeans Acting TAP Director

Members Present

- Richard “Kent” Christensen National TAP Chair
- Sallie Mullins Thompson National TAP Vice-Chair
- Ralph Bennett Chair, Notices and Correspondence Committee
- Timothy Bolin Chair, Toll-Free Phone Line Committee
- Angel Hower Chair, Internal Communications Committee
- Holly Hoffman Chair, Taxpayer Assistance Center (TAC) Committee
- Kathleen “Kathy” Jenks Harm Chair, Tax Forms and Publications Committee
- Sophia Sakoff Chair, Special Projects Committee
- Scott Hall Vice-Chair, Taxpayer Communications Committee
- Alice Azzaro Vice Chair, Toll-Free Phone Line Committee
- Mary Florence Vice-Chair, Special Projects Committee
- William “Bill” Mason Vice-Chair, Tax Forms and Publications Committee
- Angela Spain Vice-Chair, Notices and Correspondence Committee
- Paul Lubell Member, Tax Forms and Publications Committee

Absent Members

- Sheila Olsen Chair, Taxpayer Communications Committee

Staff



- Maryclaire Ramsey Executive Director, CSO
- Sheila Andrews Deputy Executive Director, CSO
- Terrie English TAS Supervisor
- Gretchen Swayzer Sr. Program Analyst
- Lisa Billups Sr. Program Analyst
- Gilbert Martinez Program Analyst
- Rosalind Matherne Program Analyst
- Matthew O'Sullivan Program Analyst
- Robert Rosalia Program Analyst
- Otis Simpson Program Analyst
- Fred Smith Program Analyst
- Kudiratu Usman Program Analyst
- Debra Awalt Analyst W&I
- Tamikio Bohler Analyst W&I
- Karin Rice Public Affairs Specialist, W&I
- Kevin Brown Management Assistant

Welcome, Review Agenda

Jeans opened the call and welcomed everyone.

Roll Call

Quorum met.

DFO/National Office Update/TAP Managers Update

Jeans recognized Sheila Andrews and Maryclaire Ramsey. Andrews thanked the committee for all they did this year and recognized all the challenges they persevered through. She thanked the retiring members for their work over the past three years and their commitment to TAP. Andrews introduced Terrie English as the new TAP Director. Andrews thanked Jeans, Susan Jimerson and Javier Hernandez for acting as the TAP Director over this extended period of time. Andrews reported the TAP 2018 package was approved and we are preparing to introduce the new members soon.

Ramsey said it was impressive to see what TAP does and how they do it to complete the TAP mission. Blessed to have met Christensen and Thompson and see their great leadership. Ramsey is excited for TAP going forward and thinks the addition of English will be very good for TAP. Ramsey also thanked Jeans, Jimerson and Hernandez for stepping in to lead TAP.

Jeans recognized the retiring members of the committee: Bennett, Spain, Sakoff, Lubell, Thompson, Harm and Christensen. Jeans encouraged the committee to take the end of the year survey to improve the overall TAP program for next year. Jeans reminded the returning members to respond to the email for committee preference for next year and indicate whether you want to be a mentor. Jeans also reported that many of our retiring members qualified for the Presidential Awards including all those on the JC and they should be coming in within a few weeks.

Jeans reported that we are considering the week of Jan. 8, 2018, for the New Member Orientation meetings as well as Jan. 29, 2018, as the projected date for the face-to-face meetings. Members are encouraged to keep those dates open as they are tentative.

Swayzer reported on the progress of the Annual Report and making adjustments to the Chair reports, as needed. Swayzer reported that some format changes are being made to report what each committee is accomplishing and removing information regarding individual performance.

Jeans mentioned they may want to share returning members contact information with the new members to help them coming into to TAP. Jeans encouraged members to ensure that www.TAPSpace.org has the correct contact information. In addition, Jeans reminded members to send in their Outreach Reports. Jeans recognized Holly Hoffman and Scott Hall as next year's TAP Chair and Vice Chair respectively.

Approval of October and Nov. 17, 2017 Minutes

October accepted as submitted. Nov. 17, 2017, accepted as submitted.

TAP Chair Report

Christensen thanked the entire panel, Thompson and the staff for all their work and said he is proud of all that was accomplished this year. Christensen expects a very busy call and is looking for a productive meeting.

TAP Vice Chair Report

Thompson thanked the panel and is proud of all we have accomplished. Thompson thanked the entire TAP staff and Subject Matter Experts (SMEs) for all their support this year. Thompson reported on her two main accomplishments for the year. Collaboration with Internal Communications Committee (ICC), will move the Virtual Outreach program forward and she created a checklist for the incoming vice chair. Thompson spoke of how fabulous the vice chairs have been all year. Thompson thanked them for all their work. Thompson reported on the exemplary outreach performers for the entire year.

Public Comments

N/A

Project Committee Review/Activities

Taxpayer Assistance Center Improvements, Chair – Holly Hoffman

Hoffman reported that the last committee meeting focused mainly on the current referral along with saying their goodbyes.

- 35999 – IRS Online Services
 - Reported the www.irs.gov retooling of the website affecting some of the suggestions on this referral. Thompson motioned, Hower seconds.
 - **Action:** Referral Elevated to IRS

Notices and Correspondence, Chair – Ralph Bennett

Bennett reported that the committee will be working on Issue 36533 next year and they agreed to pick up Issue 36555 Excessive Post Dating on IRS Notices.

- **36245** – Accounting for IRA Distributions
 - This is a single recommendation by putting a new code on the 1099R for the custodian to report that the owner instructed the money be sent directly to a charitable organization. Harm motioned, Thompson seconded.
 - **Action:** Referral Elevated to IRS

Special Projects, Chair – Sophia Sakoff

Sakoff reported the current issues were the bulk of last month's meeting.

- 32455 – ID Theft Website
 - This referral is to reorganize the website to make it simply for taxpayers and professionals to navigate through. Thompson suggested the “Background Research and Analysis” section to read “proposed above” instead of “referenced above.” This was already resolved on the final version of the referral. Thompson motioned, Harm seconded.
 - **Action:** Referral Elevated to IRS
- 35080 – Get Transcripts
 - This is to find a way to allow taxpayers abroad to use the automated services with foreign addresses and phone numbers. Thompson motioned, Hoffman seconded.
 - **Action:** Referral Elevated to IRS
- 36509 – IRS Google Listings
 - This referral is to ensure that the IRS Google listings are accurate and completely correct in this system. The listing should also include additional information such as: Hours of operation, appointments are required and lunch hours if necessary at TAC locations. Hoffman motioned, Thompson seconded.
 - **Action:** Referral Elevated to IRS

Tax Forms and Publications, Chair – Kathy Jenks Harm

Harm reported working today's referrals and completing the committee's goals for this year. Five members are retiring so big changes are expected. Harm hopes they have returning members coming back to allow the committee to get a fast start next year.

- 35276 – Form 709
 - Harm reported that adding an additional part to this form makes it a complicated recommendation. ID numbers verified for consistency by Swayzer. Hoffman motioned, Hower seconded.
 - **Action:** Referral Elevated to IRS
- 36343 – TFP Style Guide
 - This referral reviewed the Style Guide for Tax Forms and Publications and made recommendations that might make the writing by the IRS a little closer to what is readily understood by the taxpayers. Bolin motioned, Hall seconded.

- **Action:** Referral Elevated to IRS

Toll-Free Lines, Chair – Timothy Bolin

Bolin reported that Nina Olsen will encourage the IRS to update their phone systems and some of its features. Bolin said the committee participated in a focus group for improving IRS phone lines. The committee gave lots of information to this effort. Jimit Shah retired because of his duties in the Puerto Rico relief effort. Subcommittee 1 will meet in December on how to get option to deal with private debt collection on the 1040.

- 35594 – Info Rtns FIRE Line
 - This referral is to get information to the caller sooner during the call. Harm motioned, Thompson seconded.
 - **Action:** Referral Elevated to IRS

Christensen commended the innovative reference to the Taxpayer Bill of Rights (TBOR) for this referral and recommends this be used in all referrals moving forward.

Taxpayer Communications (TCC) Chair – Sheila Olsen

Scott Hall reported 36467 already elevated to IRS. Hall reported that Issue 35364 will be rolling over to next year as they await a response from a SME. They want to add a filing deadline countdown clock to www.irs.gov for the individual self-employed small businesses section. This is to help avoid quarterly filers missing payments. Hall reported a lot of outreach and recognized Jim Sowell, Ellen Bemis, Dan Smolnik for this month. Hall thanked everyone for the congratulations and kind words for next year. Hall recognized Gail Reese who is retiring.

Internal Communications, Chair – Angel Hower

Hower reported having to fill Jimit Shah's place for the newsletter. Hower is looking for a member would to replace him for this project. Hower reported that they finalized the continuation manual. Hower will work with the TAP staff to continue the newsletter.

Round Table

Bolin thanked Hower for all her leadership work in only her first year. Christensen congratulated Bolin and his group for the focus group selection and participation. Christensen congratulated Hoffman and Hall for next year.

Jeans thanked everyone for all their work this year especially Christensen and Thompson. Thanked retiring members on behalf of the staff, the Executive Director and Andrews and wished happy holidays to everyone.

Closing

Jeans closed the meeting.

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



**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Nov. 17, 2017**

Designated Federal Official (DFO)

- Susan Jimerson Acting TAP Director

Members Present

- Richard “Kent” Christensen National TAP Chair
- Ralph Bennett Chair, Notices and Correspondence Committee
- Angel Hower Chair, Internal Communications Committee
- Holly Hoffman Chair, Taxpayer Assistance Center (TAC) Committee
- Kathleen “Kathy” Jenks Harm Chair, Tax Forms and Publications Committee
- Sophia Sakoff Chair, Special Projects Committee
- Scott Hall Vice Chair, Taxpayer Communications Committee
- Gail Reese Member, Taxpayer Communications Committee

Members Absent

- Sallie Mullins Thompson National TAP Vice Chair
- Timothy Bolin Chair, Toll-Free Phone Line Committee
- Sheila Olsen Chair, Taxpayer Communications Committee

Staff

- Sheila Andrews Deputy Director, CSO
- Cedric Jeans Chief, TAP East
- Gretchen Swayzer Sr. Program Analyst
- Gilbert Martinez Program Analyst
- Matthew O’Sullivan Program Analyst
- Robert Rosalia Program Analyst
- Antoinette “Toni” Ross Program Analyst
- Kevin Brown Management Assistant

Roll Call

Quorum met.

Project Committee Review/Activities

Taxpayer Communications (TCC) Chair – Sheila Olsen

36467 – IRS2GO

Gail Reese presented the referral for consideration. Hoffman motioned, Hower seconded.



Referral elevated as amended.

Notices and Correspondence, Chair – Ralph Bennett

36227 – Notice CP22A

Bennett presented the referral for consideration and explained its purpose. Harm motioned, Hall seconded.

Referral approved for elevation.

Special Projects, Chair – Sophia Sakoff

35185 – International Authentication Options

All suggestions and edits were implemented on the referral per Sakoff. There was a lengthy discussion about the specifics of the referral before the committee understood its intent. Hoffman motioned, Hower seconded.

Referral approved for elevation.

Taxpayer Assistance Center Improvements, Chair – Holly Hoffman

34028 – Institutions Accept Transcripts

Hoffman presented the referral for consideration and explained its purpose. All suggestions and edits were implemented on the referral from last month's meeting, per Hoffman. Hall motioned, Harm seconded.

Referral approved for elevation.

Closing

Jimerson closed the meeting.

**Next meeting: Nov. 29, 2017
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
Oct. 25, 2017**

Designated Federal Official (DFO)

- Cedric Jeans Acting TAP Director

Members Present

- Richard “Kent” Christensen National TAP Chair
- Sallie Mullins Thompson National TAP Vice Chair
- Ralph Bennett Chair, Notices and Correspondence Committee
- Timothy Bolin Chair, Toll-Free Phone Line Committee
- Angel Hower Chair, Internal Communications Committee
- Holly Hoffman Chair, Taxpayer Assistance Center (TAC) Committee
- Kathleen “Kathy” Jenks Harm Chair, Tax Forms and Publications Committee
- Sheila Olsen Chair, Taxpayer Communications Committee
- Sophia Sakoff Chair, Special Projects Committee
- Alice Azzaro Vice Chair, Toll-Free Phone Line Committee
- Mary Florence Vice Chair, Special Projects Committee
- Scott Hall Vice Chair, Taxpayer Communications Committee
- Angela Spain Vice Chair, Notices and Correspondence Committee

Staff

- Susan Jimerson Chief, TAP West
- Gretchen Swayzer Sr. Program Analyst
- Lisa Billups Sr. Program Analyst
- Gilbert Martinez Program Analyst
- Rosalind Matherne Program Analyst
- Matthew O’Sullivan Program Analyst
- Robert Rosalia Program Analyst
- Antoinette “Toni” Ross Program Analyst
- Otis Simpson Program Analyst
- Fred Smith Program Analyst
- Debra Awalt Analyst W&I
- Tamikio Bohler Analyst W&I
- Karin Rice Public Affairs Specialist, W&I
- Kevin Brown Management Assistant

Welcome, Review Agenda

Jeans opened the call and welcomed everyone. Christensen reviewed the agenda and put the Toll Free committee report first to accommodate Bolin’s schedule.

Roll Call



Quorum met.

DFO/National Office Update

Jeans indicated that the 2018 Recruitment Package is almost ready to be sent forward for approval. Jeans also reminded everyone to thank the retiring members for their service. Jeans indicated we will be reaching out to the returning members to solicit committee choices for next year and that the annual survey will be sent out soon.

Jeans spoke about the Meet the Chair process that is happening prior to the vote for next year's national chair and vice chair. The ballots will go out Oct. 26, 2017 and will be due Oct. 31, 2017. Jeans spoke about links being sent out giving members more information about the recent weather disasters that might interest taxpayers.

TAP Managers Update

Jimerson reported the Annual Report is making progress. She also mentioned the Internal Communications and the Outreach committees are collaborating.

Approval of September Minutes

Approved as submitted.

TAP Chair Report

Christensen anticipates this will be a busy meeting with several referrals to be reviewed.

TAP Vice Chair Report

Thompson reported they are working on a document to give to the incoming vice chair, which will include the Virtual Outreach Toolkit. This is to ensure all ideas and progress made this year is passed on properly. Thompson reported the TAP October Newsletter highlights the three committees with the most outreach hours. Thompson also wants members to focus on the Problem-Solving Days with the Local Taxpayer Advocates (LTAs).

Project Committee Review/Activities

Internal Communications, Chair – Angel Hower

Hower reported the committee is still working on the continuation manual. There is a plan to continue the newsletter during the TAP downtime starting in December.

Toll-Free Lines, Chair – Timothy Bolin

Bolin reported that the Subcommittee 1 is changing their meeting to the second Wednesday of the month to get referrals completed and ready for the JC review process. They are also working an issue on the 1040 phone line and how it addresses "Where's my refund", "Private debt collection", and how it helps set up personal online accounts. These are still being researched and will most likely be ready next year.

Bolin reported Subcommittee 2 is looking at the Systemic Issue Review and Evaluation (SIRE) line script. The referral is an attempt to place information about where's my



refund at the beginning of the script. Bolin indicated there will be at least one referral ready for next month's meeting.

35872 – PSA AM Assistors

Azzaro reported the goal of this referral is for the Account Management (AM) to direct the taxpayer to self-help resources.

Christensen will send rewording and small punctuation changes for the Background and Analysis section, which will not change the referral, to Bolin and Azzaro for review. The Goal Statement has to have Account Management or Customer Service Representative to make it better understood. Harm motioned, Hower seconded.

Referral Elevated as amended.

Notices and Correspondence, Chair – Ralph Bennett

Bennett reported all suggested changes have been implemented on both referrals. Harm inquired about instructions about mailing in an Installment Agreement within these forms. The option to call to complete an installment agreement, if it cannot be done online, will be added to both referrals. The order of the recommended information was corrected for better flow. Christensen will provide minor word corrections prior to finalizing these referrals.

36252 – Ltr 728

Hower motioned, Harm seconded. **Referral Elevated as amended**

36253 – Ltr 3220

Harm motioned, Hoffman seconded. **Referral Elevated as amended**

Bennett reported that Issue 36227 for *Form CP22A* most likely will be ready for mid-November's meeting. Issue 36245 on Qualified Charitable Distributions may be ready by the end of November. Bennett anticipates about three referrals for next month.

Special Projects, Chair – Sophia Sakoff

Sakoff reported that Issues 32455 and 35586 were combined into one ID Theft referral that is going to the JC Quality Review (QR). Issue 35080 and the Google Business Listing issue should be available for next month's meeting.

35185 – International Authentication Options

In lieu of the Equifax security breach, the Equifax and Equinox name will be changed to consumer credit report agency with international services in several places on the referral. Due to the complicated corrections and changes, Sakoff will send proposed changes to Christensen and Thompson for further review.

Referral will be tabled for rewrite and reconsideration until November meeting.

Tax Forms and Publications, Chair – Kathy Jenks Harm



Harm reported they are working on a rebuttal to five recommendations from Issue 35899 on *Form 3115*. Subcommittee 1 is working on Issue 13304, *Form 709: Gift (and Generation – Skipping Transfer) Tax Return*. This should be ready for one of the November meetings.

35655 – Form 8965

Christensen recommended rewording Goal Statement. Thompson motioned, Hoffman seconded.

Approved as amended to Elevate to the IRS.

36246 – Form 2848

The CAF question was removed. The form number was added to the Goal Statement. Thompson motioned, Hoffman seconded.

Approved as amended to Elevate to the IRS.

Taxpayer Assistance Center Improvements, Chair – Holly Hoffman

Hoffman reported Issue 35999 is going through the review process and receiving minor edits. The monthly committee meeting was moved to Nov. 14, 2017, and pushed back an hour to ensure the committee is able to approve this issue before the next JC meeting. The committee will write up a referral transmission document to be able to pass all important issues, including Subject Matter Experts (SMEs) reports, is fully transmitted to next year's committee with nothing getting lost. Hoffman reported that the committee is working on writing a welcoming statement for the incoming members to get them engaged and moving forward quickly.

34028 – Accept Transcripts

Harm suggested the Goal Statement and Recommendations sections be corrected. After numerous suggestions and corrections, it was determined that the referral be reworded to make it flow better for easier understanding.

Referral will be tabled for rewrite until November meeting.

Taxpayer Communications (TCC) Chair – Sheila Olsen

35819 – Refundable Credits

Olsen indicated that all suggestions from last month were accepted and implemented for this referral. Harm motioned, Hoffman Seconded.

Approved to elevate to the IRS.

Olsen reported that Issue 36467, on the IRS2Go mobile application, is going through the QR process and should be ready for next month's meeting.

Round Table



Christensen indicated that Sakoff created an IRS referral template that he will be sending to everyone for feedback. Bohler suggested including the six strategies from the IRS Future State and tying future referrals to them for more effectiveness. Bohler will send an updated copy of the six strategies to be included with future referrals.

Closing

Jeans closed the meeting.

**Next meeting: Nov. 17, 2017
11 a.m. ET; 10 a.m. CT; 9 a.m. MT; 8 a.m. PT**

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



**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Sept. 27, 2017**

Designated Federal Official (DFO)

- Susan Jimerson Acting TAP Director

Members Present

- Richard "Kent" Christensen National TAP Chair
- Sallie Mullins Thompson National TAP Vice Chair
- Kathleen "Kathy" Jenks Harm Chair, Tax Forms and Publications Committee
- Ralph Bennett Chair, Notices and Correspondence Committee
- Timothy Bolin Chair, Toll-Free Phone Line Committee
- Angel Hower Chair, Internal Communications Committee
- Sheila Olsen Chair, Taxpayer Communications Committee
- Sophia Sakoff Chair, Special Projects Committee
- William "Bill" Mason Vice Chair, Tax Forms and Publications Committee
- Alice Azzaro Vice Chair, Toll-Free Phone Line Committee
- Daniel Smolnik Member, Taxpayer Communications Committee

Members Absent

- Holly Hoffman Chair, Taxpayer Assistance Center (TAC) Committee

Staff

- Cedric Jeans Chief, TAP East
- Susan Jimerson Chief, TAP West
- Lisa Billups Sr. Program Analyst
- Gretchen Swayzer Sr. Program Analyst
- Robert Rosalia Program Analyst
- Otis Simpson Program Analyst
- Antoinette "Toni" Ross Program Analyst
- Fred Smith Program Analyst
- Matthew O'Sullivan Program Analyst
- Gilbert Martinez Program Analyst
- Rosalind Matherne Program Analyst
- Debra Awalt Analyst W&I
- Karin Rice Public Affairs Specialist, W&I
- Kevin Brown Management Assistant

Welcome, Review Agenda

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

Roll Call



Quorum met.

DFO/National Office Update

Jimerson reported that she will be finishing up as Acting TAP Director next week, at which time Cedric Jeans will take over as Acting TAP Director through the end of October. The process to select a permanent TAP Director will hopefully be completed by the end of October.

Jimerson stated that we have entered the TAP chair and vice chair election season. On Sept. 27, 2017, Gretchen Swayzer, the lead analyst for the election process, sent out the initial email regarding these events. The first scheduled event is on Oct. 17, 2017, to learn more about the responsibilities of the TAP chair and vice chair. Kent Christensen will be hosting this meeting. This is a good opportunity to ask Christensen about working as the TAP leader. If you did not receive the email, please let Swayzer know so we can get this information forwarded to you.

The 2017 Annual Report committee has started its first round of review on the chair reports. Lastly, the recommendation phase of recruitment is completed and we are currently completing the background checks on the potential new members and alternates.

TAP Managers Update

Jeans reported we are here to assist you to wrap up year-end TAP activities. Jeans also indicated the TAP East analysts would be filling in as the Chief of TAP East while he is serving as Acting TAP Director. Jimerson reported that Lisa Billups and Gilbert Martinez are filling in as Chief of TAP West while Jimerson is Acting Director.

Approval of July and August Planning Meeting Minutes

August minute changes: Holly Hoffman and Sheila Olsen changed to present, Scott Hall and Angela Spain listed as present once; Under Toll Free Lines Chair report, Issue 36206 Bolded. Last sentence changed to, "...after being clarified by the committee"; Under the Vice Chair Report first sentence, "the" was removed from before experience.

August planning meeting minute changes: TAP Chair Address, the last sentence changed to, "...and not adopted by the IRS." Internal Communications, Chair report, "The" was capitalized; third line changed to, "to submit content consistently."
www.TAPSpace.org corrected throughout the document. Notices and Correspondence report added, "Doak also suggested creating a handbook for new chairs on conducting meetings." Page five Feedback corrected to "medal" instead of "metal."; Systemic Advocacy Update "...from security guard procedures..." to "...in security guard procedures..." Face-to-Face" updated throughout the document. Mentor Training second bullet changed to "committees." The minutes accepted as amended.

TAP Chair Elections



Christensen reminded the committee to send in their nominations as listed in the email. In addition, please reach out to Christensen and Thompson for detailed information about their positions.

TAP Chair Report

Christensen anticipates it will be a busy meeting with several referrals being reviewed.

TAP Vice Chair Report

Thompson reported that the Outreach Committee is still working on the User's Guide for outreach. Once this is completed it will be reviewed by the entire committee for feedback. The Outreach Report has been submitted for the September newsletter. Thompson reported that she is still waiting for three monthly Outreach Reports to be posted on www.tapspace.org. Thompson thanked the vice chairs for all they are doing.

Public Comments

N/A

Project Committee Review/Activities

Internal Communications, Chair – Angel Hower

Hower reported the members are working on a continuation manual for the committee and working their assignments. All assignments will be combined and reviewed as a committee to present in final format. The Newsletter along with the Facebook account is being worked monthly. Hower asked for all members to please join, share and like Facebook for TAP.

Special Projects, Chair – Sophia Sakoff

35185 – Int'l Authentication Options

This referral is to provide US citizens living abroad an alternative authentication option to access the IRS website.

Thompson mentioned the referral needs to be checked by the JC Quality Review (QR) to be sure the referral is in correct format. Send suggestions to Sakoff to be considered per Jeans.

Referral tabled for next month for Quality Review process

Issues **34255** and **34586** are being combined into one referral. This is our enhancement to the taxpayer ID Theft section on www.irs.gov. The recommendation is have the information broken down into specific categories so taxpayers have an easier time finding the information they need. This is currently in QR.

36509 – IRS Google business listings. The recommendation is for IRS to update this information correctly so the proper business hours, phone numbers and specifics are corrected on Google. We expect the referral to be ready for the November JC meeting.

35080 – Get Transcripts function is not working for foreign email addresses and foreign physical addresses and postal codes. This prevents overseas taxpayers use of the system. Sakoff is hopeful this referral will be ready for the October or November JC meeting.

Tax Forms and Publications, Chair – Kathy Jenks Harm

Harm reported that our Puerto Rican member, Jacob Torres, is safe and sound, but they are in very bad shape on the island.

35531 – Number to Order Forms on 1040 Instructions

We want to move this information to the beginning of document. Note that Publication 17 is not available in paper format from the IRS but it is available at www.amazon.com added. Christensen suggested bolding “ordering Forms and Publication” to remain consistent. Thompson motioned, Harm seconded.

Approved as amended to Elevated to IRS

36022 – Form 941 & Mailing Address

The recommendation is to place the privacy statement on the Form 941. Christensen suggested Project statement adjustment to remove “...and mailing address.” Hower motioned and Thompson seconded.

Approved as amended elevated to IRS

Harm reported the committee is currently working on Issue 35655 on Affordable Care Act (ACA), Form 8965 hopefully this will be ready next month JC. Issue 35276, Form 709 Generation Skipping Tax hopefully will be ready for November JC. Issue 36246, Form 2848 Submitting Power of Attorney will be ready for October JC. Questions came up about who could complete the free fillable forms, which can be completed by anyone. Awalt reported the IRS sent a response today and should get to the committee in the next couple of days. The committee’s recommendation to the IRS Style Guide may be sent in November. Harm reported that they don’t have many new issues at this time.

Taxpayer Assistance Center Improvements, Chair – Holly Hoffman

Lisa Billups reported they anticipate having one referral ready for the October JC and one referral ready for the November JC meeting.

Taxpayer Communications (TCC) Chair – Sheila Olsen

35819 – Refundable Credits Communication

Dan Smolnik reported this referral was intended to increase the number of eligible taxpayers taking advantage of the Earned Income Tax Credit (EITC). The



recommendation is to make it easier for taxpayers to find this credit and take advantage of it. Item 2 Part C may be more of a proposal instead of background research. Thompson suggested that this go into recommendation section.

Referral tabled to next month to allow additional review.

Olsen reported her subcommittee is still working 35874 but it is not ready.

Toll-Free Lines, Chair – Timothy Bolin

Bolin commended the committee for great attendance. Subcommittee 1 is still working on the Public Service Announcement Issue **35872** which is awaiting QR. Hopefully this will be ready next month. Bolin reported the committee is working on three issues with the toll free script on the 1040 line: making sure the “Where’s my refund” line works; checking to see if it references the Private Debt Collection; and seeing if it mentions that taxpayers can create an online account for taxpayer self-help options.

Subcommittee 2 has issue **36206** Area Code/Time Zone Restrictions.

Bolin indicated the committee accepted all the recommended changes from the previous JC meeting to include making the recommendations bullet points instead of numbers. The referral reads well and gets to the point per Christensen and Thompson. A correction was also made with a quoted response in the document for correct formatting. Jenks moved, Thompson seconded.

Referral elevated as amended to the IRS

The SPIRE Line project is being put on hold for now. The scrip for the EITC line will be worked on and hopefully may be ready by the next meeting.

Notices and Correspondence, Chair – Ralph Bennett

36252 – Letter 728 Your Payment did not Cover Entire Tax Liability

Bennett reported the referral is to soften the tone and level of courtesy of the letter. The recommendations are for more courtesy and professionalism; mention that Taxpayer Assistance Centers (TACs) are by appointment only; professionalism in greater detail; mention penalty possibilities; give an option for an installment agreement; and removing the reference for the IRS to charge interest.

36253 – Letter 3220 Accounts Outstanding – Payment Request

The recommendations are almost the same as Letter 728 with the primary focus of being less intimidating and more professional. Christensen recommended writing “and or” instead of “and/or”; the word “unnecessary” was deleted from the Project Statement. The project statement needs to be strengthened and a part of it was removed. The goal statement must be reworded.



The Taxpayer Bill of Rights was moved to a different part of the recommendation. The recommendation section had the first sentence deleted. Because of the detailed corrections the referral will be revised and presented next month.

Both referrals tabled until next month for suggested changes

Bennett reported the committee is working on issue **36227** CP 228A where a full social security number still being shown on the notice. In addition, issue **36254** suggesting a special code be used for qualified charitable distributions on Form 1099R. They are looking at one or two additional issues that may still be worked.

Round Table

Christensen indicated that there may be an additional JC meeting needed for mid-November to get through all the referrals that are being presented at the end of the TAP year. This decision will be made next month.

Closing

Jimerson closed the meeting.

**Next meeting: Nov. 29, 2017
1 pm ET; Noon CT; 11 am MT; 10 am PT**

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



**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Aug. 30, 2017**

Designated Federal Official (DFO)

- Javier Hernandez Acting TAP Director
- Sheila Andrews Deputy Director CSO

Members Present

- Richard “Kent” Christensen National TAP Chair
- Sallie Mullins Thompson National TAP Vice-Chair
- Kathleen “Kathy” Jenks Harm Chair, Tax Forms and Publications Committee
- Holly Hoffman Chair, Taxpayer Assistance Center (TAC) Committee
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- Angel Hower Chair, Internal Communications Committee
- Mary Florence Vice Chair, Special Projects Committee
- Scott Hall Vice Chair, Taxpayer Communications Committee
- Angela Spain Vice Chair, Notices and Correspondence Committee
- William “Bill” Mason Vice Chair, Tax Forms and Publications Committee
- Alice Azzaro Vice Chair, Toll-Free Phone Line Committee

Members Absent

- Sophia Sakoff Chair, Special Projects Committee

Staff

- Cedric Jeans Chief, TAP East
- Susan Jimerson Chief, TAP West
- Lisa Billups Sr. Program Analyst
- Gretchen Swayzer Sr. Program Analyst
- Robert Rosalia Program Analyst
- Otis Simpson Program Analyst
- Antoinette “Toni” Ross Program Analyst
- Fred Smith Program Analyst
- Matthew O’Sullivan Program Analyst
- Gilbert Martinez Program Analyst
- Rosalind Matherne Program Analyst
- Debra Awalt Analyst W&I
- Karin Rice Public Affairs Specialist, W&I
- Kevin Brown Management Assistant



Welcome, Review Agenda

Hernandez opened the call and welcomed everyone. Christensen reviewed the agenda.

Roll Call

Quorum met.

DFO/National Office Update

Hernandez reported that the recruitment process is in full swing. Currently the staff analysts and management are in Albuquerque, NM for an analyst meeting. Many ideas are being shared during this process.

TAP Managers Update

Andrews thanked everyone for all they do and the encouragement and feedback that they gave to the staff during the JC planning meeting last week. Jeans and Jimerson thanked everyone for what they do and all of the support from the Chairs and Vice Chairs.

Approval of July and August Planning Meeting Minutes

Christensen made a procedural update indicating that the minutes only have to be approved once any corrections have been made and not voted on to be accepted.

July meeting minute changes: Page 2 TAP Chair report changed to remove the word “back” from the last sentence. Page 4 under Toll Free Lines report second to last sentence on first paragraph “committee” added before “QR”. Scott Hall duplicate name on members present removed. Mary Florence added as present for Special Projects committee in light of Sakoff’s absence.

July minutes accepted as amended

Strategic Planning meeting minute changes: Goal 1 the word “to” high speed internet added. Goal 4 second paragraph “group” added to “...focusing on this issue.”

Minutes accepted as amended

TAP Chair Report

Christensen spoke about how meaningful the JC Planning meeting went. Christensen reported that Sallie Mullins Thompson will run the election for next year. Christensen reminded all to obtain someone’s permission before nominating them for a position.

TAP Vice Chair Report

Thompson spoke about meeting everyone during the meeting and that is was a good experience. Thompson stated how helpful it was to meet the TAP staff in person. Thompson reviewed the August 17, 2017 Outreach and Internal Communications (ICC)

meeting and the determinations from this event. The Outreach committee will work on the user's guide document while the ICC will work on Facebook page postings, library of sample messages and news. Thompson also has the Future State of the TAP Outreach committee if anyone is interested in this information.

Thompson also reported the ICC will be putting out a TAP newsletter in August. In it Thompson will recognize the top eight outreach performers for the 2017 year. This can be a source for anyone looking for outreach ideas. Thompson reminded committees to get their outreach reports to her as soon as they can.

Public Comments

N/A

Project Committee Review/Activities

Tax Forms and Publications, Chair – Kathy Harm

Harm thanked TAP staff and Subject Matter Experts (SMEs) who made a lot of things clearer for her during the JC planning meeting.

#34038 – Babysitting and childcare payment treatment in Publication 17 and 525. Publication 926 is very clear on babysitting payment. Babysitting is normally not the same as childcare. There are three recommendations on this issue and it has gone through Systemic Advocacy (SA), Attorney Advisors (AA) and Quality Review (QR).

Harm wished to add, "See also Pub. 926" under the first recommendation under the comments and justification section per Thompson. Christensen suggested being more specific in the Recommended Text section of page 2. Background, Research and Analysis section "What is not covered" to be bolded for consistency.

Thompson motioned, Hower seconded.

Consensus to elevate as amended

#35657 – Instructions for Schedule D, There are six recommendations. For ID 1193, add "or other disposition" in the first two sentences of section 3 of the recommendation. Hower motioned, Thompson seconded.

Consensus to elevate as amended.

#36059 – Publication 17 Late incoming docs from 3rd parties. "Income" corrected in two sections. Bolin motioned Hower seconded.

Consensus to elevate as amended

#36175 – Publication 560 Review. Section 2, add [IRS please provide examples...]. Bolin motioned, Hower seconded.

Consensus to elevate as amended



Christensen thanked the committee for all of their work and asked that Harm send this praise back to her committee.

Taxpayer Assistance Center Improvements, Chair – Holly Hoffman

Hoffman reported that two referrals are close to being completed and hopefully being ready in October.

Taxpayer Communications (TCC) Chair – Sheila Olsen

Olsen reported that issue 35819 on the Earned Income Tax Credit (EITC) is going through SA and AA and they are currently awaiting a response. The other subcommittee is currently working on another issue pertaining to the IRS mobile site. Olsen has five recommendations for future referrals to submit to her committee chair. Olsen recommended the committee log into the www.irs.gov and notice the changes.

Toll-Free Lines, Chair – Timothy Bolin

Bolin reported on issue 35812 regarding ways to get telephone assistors to aid taxpayers into moving over to the online services. The issue is currently being reviewed by AA and the committee QR. The committee is currently working on issue 36247 regarding the Individual Taxpayer Identification Number (ITIN) line. Long wait times and other issues will be the focus of this referral. The committee will work a new referral for changing to the script on the EITC line. This was an old referral and will be a simple approach to get it reconsidered as a new referral. Next year there will be a referral regarding the initial message on most of the toll free lines regarding including a reference to possibly setting up an online account. Another issue discussed is whether the IRS has a dedicated line for people inquiring about Private Debt Collection.

#36206 – Area Code/Time Zone Restrictions, presented for elevation. Thompson had several questions and concerns about the referral and needed clarification. There was a discussion regarding exactly what the referral wanted to focus on such as lifting the area code restrictions from cellular phones and shared calls for different time zones. This referral is tabled until next month to allow the most current referral to be presented after being clarified by the committee.

Referral sent back to committee and tabled for next month.

Notices and Correspondence, Chair – Ralph Bennett

Bennett reported they are working issues they listed last month. The intent is to try to bring as many as four referrals for the next JC. Bennett recognized Alyssa Burrows for reaching 2800 people last month.

Special Projects, Chair – Sophia Sakoff

Mary Florence reported that the ID Theft subcommittee is working on a project where they combined several issues into one project. This will help people determine how to get to the information they need and navigate the www.irs.gov site. The International subcommittee is dealing issue 35166 which was rejected because the IRS had



addressed part of it. They will create another referral because international taxpayers are required to file electronically yet there are a lot of links and places online that contradict this process and need to be clarified. In addition, folks are still getting charged penalties and interest.

Florence thanked Harm for what they did on their referrals as it is helping this committee with their referrals. Florence referred to issue 35185 as it could be applied to many other cases because it has to do with ID verification that applies to all taxpayers abroad and stateside. This issue is currently being worked and should be sent forward for the next JC and it will mention that if this does work it can be applied to other cases.

Florence reported that they have a member writing up another issue that is currently being worked on at this time. Florence thanked Tamikio Bohler for encouraging TAP to write up an issue regarding fixing IRS information on Google to make sure it is accurate.

Internal Communications, Chair – Angel Hower

N/A

Round Table

Jimerson also shared the IRS has launched its new website. Christensen appreciated Maryclaire Ramsey and Sheila Andrews attending the face to face planning meeting. Today might be Hernandez's last day with TAP. Hernandez thanked all the Chairpersons and the panel for all of their work.

Closing

Hernandez closed the meeting.

**Next meeting: September 27, 2017
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 22-23, 2017**

Designated Federal Official (DFO)

- Javier Hernandez Acting TAP Director

Members Present

- Richard “Kent” Christensen National TAP Chair
- Sallie Mullins Thompson National TAP Vice-Chair
- Kathleen “Kathy” Jenks Harm Chair, Tax Forms and Publications
- Penny Doak Designated Chair, Notices and Correspondence
- Timothy Bolin Chair, Toll-Free Phone Lines
- Holly Hoffman Chair, Taxpayer Assistance Centers
- Sheila Olsen Chair, Taxpayer Communications
- Mary Florence Vice Chair, Special Projects
- Angel Hower Chair, Internal Communications

Members Absent

- Ralph Bennett Chair, Notices and Correspondence
- Sophia Sakoff Chair, Special Projects

Staff

- Maryclaire Ramsey Director CSO (Day 2)
- Sheila Andrews Deputy Director CSO
- Javier Hernandez Acting TAP Director
- Cedric Jeans Chief, TAP East
- Susan Jimerson Chief, TAP West
- Gretchen Swayzer Sr. Program Analyst
- Fred N. Smith, Jr. Sr. Program Analyst
- Tamikio Bohler Wage and Investment (W&I) Liaison

Welcome, Review Agenda

Javier Hernandez opened the meeting and welcomed everyone.

Roll Call & Ice Breaker

Everyone present in the room. No public attendance.

DFO/National Office Update



Hernandez expressed his delight at the outreach the committees have done to reach the underserved. He encouraged the chairs to communicate the efforts of their committees to their analysts so it can be given to the National Taxpayer Advocate (NTA). The NTA feels the IRS should upgrade their phone system to include a call-back feature. There was a general threat to IRS websites this week. Be vigilant in verifying you are on a verified website.

TAP Chair Address

Christensen spoke on how he feels the work that the Toll-Free and Taxpayer Assistance Centers (TAC) Committees perform have a lot of crossover and wonders if the committees are properly aligned. Additionally, he questioned if the Special Projects Committee have enough issues to work. It is his desire to see a new member assistance program that would bridge the gap between existing members that are transitioning off of the committee and new members onboarding. He personally volunteered to offer any assistance to the incoming member of his state. He would also like to see more emphasis on how to write a referral so that it would diminish the amount of referrals that are not approved by the JC and non-adopted by the IRS.

TAP Vice-Chair Address

Thompson gave a report on the monthly TAP outreach newsletter. She also stated the vice-chairs of each committee are working with their members to create a better relationship with their respective Local Taxpayer Advocates (LTAs). TAP had great representation at the IRS tax forums and looks forward to exchanging and sharing information learned from each event. She also mentioned the collaboration between the Outreach and Internal Communications committee on conducting virtual outreach via social media.

2017 Project Committee Review

Internal Communications, Chair – Angel Hower

There were three newsletters released thus far. The committee has worked on keeping their Facebook page current and adding substantive information. What they would now like to do is get each committee to submit content consistently, and to create a process and guidelines for this to occur. Establishing continuity for this committee going into next year is a priority. Still ascertaining which links should constantly be available.

Action 1: Create process and guidelines for submitting content consistently

Action 2: Establish continuity for the committee moving forward

Action 3: Determine links to be constantly available.

Taxpayer Communications (TCC), Chair – Sheila Olsen

One of the subcommittees currently has a referral with the attorney advisor for review. This referral is about ensuring and identifying creative ways to reach taxpayers that are not taking advantage of Earned Income Tax Credit. The committee is also working on ways to improve the IRS2GO mobile app so that more people can utilize its



convenience. They are also looking at ways to make www.IRS.gov more mobile friendly since a large portion of the population is now using a mobile device to access the internet.

Taxpayer Assistance Center, Chair – Holly Hoffman

There are two proposals that are coming up. The first is in Systemic Advocacy (SA) for review (tax transcripts for colleges). The second referral is about the awareness of online tools. The committee hopes to have both of these ready for the November JC meeting. The committee has had some attendance issues and is only able to conduct work during the subcommittee meetings.

Notices and Correspondence, Designated Chair – Penny Doak

This committee's first issue was worked in the gap period between last TAP year and this one and was already a proposal at the face to face meeting in March. Doak stated that continuing members should work (administrative meetings) between the TAP years as there may be opportunity to move some issues from the prior year forward or at least have them in better shape for the ensuing year. Members of this committee have stated that TAPSpace is not very user-friendly and they have chosen to use Google docs as a way of processing their work. Doak also stated that including a financial impact statement with each referral can strengthen it. Doak also suggested creating a handbook for new chairs on conducting meetings.

Toll-Free Lines, Chair – Timothy Bolin

The issue involving Accounts Management Assistors to educate callers about the available online services is with SA for review and will then come to the JC. It has been identified that the ITIN toll-free line has a long wait time and this will be reviewed and likely be a new issue for one of the subcommittees. The issue regarding area code routing is going to be presented to the JC next week. It is suggested that we bring on alternate members to listen to the work that we do so they are more prepared if elevated to a full member position.

Action 4: Invite TAP alternate members to full committee meetings

Special Projects, Chair – Mary Florence

This committee's international member left in December 2016 but helped prepare for this TAP year. The committee is looking into the process flow of ID theft as one of its projects. Future State for US citizens living abroad is a referral coming to the next JC meeting.

Tax Forms and Publications, Chair – Kathy Jenks Harm

This committee worked several issues during the gap period and was prepared to make a presentation at the face to face meeting in March. Thus far, 231 recommendations have been submitted and 118 have been responded to. Of that, 45 have been adopted/partially adopted.

Outreach Committee, Chair – Sallie Mullins Thompson

Thompson provided thoughts on outreach strategies in the following areas:
Continue:

- 'Boots on the Ground' outreach with TAS LTAs and various Liaisons (Shareholder, District, Congressional).
 - Pass on contact info from one year to next so no re-inventing the wheel.
 - Include TAP alternates when possible.
- Posting of monthly outreach success stories on TAPSpace; distribution of link to entire panel. Include exemplary statistics, such as number of outreach hours and audience size
- Outreach Committee Chair Spotlight report appears in monthly TAP newsletter
- Sharing/exchange of ideas/presentations/PRs and IRS News among Project Committee Vice Chairs (VCs)
- Outreach reporting during full project committee meetings

Content design:

- Target the message to the audience in order to motivate readers to act
- Facilitate taking the action within the content.
- Craft easy-to-read messages, with bulleted lists and short paragraphs
- Provide template to include: Personal paragraph; basic informational section; and generic TAP language (mission statement)
- Include important elements for the reader:
 - Opportunity – taxpayer with an issue
 - Ability – provide links to share suggestions and input
 - Incentive – resolve problem, help others, and/or offer anonymous feedback

Process management:

- Watch words for outreach process: Efficient, simplistic, user-friendly, and consistent
- Basic message needs to be same; although TAP members may shorten/embellish as they choose
- Directing the specific facility to be used to disseminate TAP messages is not recommended
- Allowing TAP members to select the web medium, with which they are most comfortable and have followers, will add genuineness and trust to the outreach
- Message content needs to be placed on the current TAP Facebook page for accurate transmission, administrator monitoring, ease of reposting, control of content, and SEO improvement
- Establishment of a TAP Twitter account (or not?) to control consistency of content and/or a TAP Linked In group to reach businesses and tax practitioners; both will require administrators to monitor, as for Facebook
- Enhancement of virtual outreach activities so that TAP becomes more mainstream

- A link to improveIRS.org should be specified at www.IRS.gov in the Help and Resources section of its home page
- Library of sample messages, press releases, and IRS News can be maintained at TAPSpace in Outreach section so people can find these
- Users Guide + TAP Newsletter: Reference materials for all TAP outreach efforts

Outreach activity reporting:

- Make reporting outreach activity easier and less time-consuming
- Explain the importance and need for accuracy of these reports
- Ensure that all TAP members understand how to complete the report
- Survey TAP members to determine best format and method for this report in order to collect the most complete data possible
- Consider alternatives, such as online, fill-on form where the data is stored in a database from which reports are effortlessly generated
- Remove the contact info columns from the middle of the current excel sheet or separate the outreach report from the TAP work one to make both concise and viewable on the screen without having to scroll sideways to enter comments.
- Develop and distribute monthly consolidated reports for each Project Committee (PC) VC to report, in a straight-forward manner, his/her PC's monthly outreach activity.

Feedback:

- Use tracking/analytics tools to measure effectiveness of virtual outreach and share information on TAPSpace, in Project Committee meetings, and at Joint Committee meetings.
- Relate exemplary statistics, such as number of outreach hours and audience size, when telling outreach stories
- Recognize recipients of the Presidential Medal Awards, especially if these are given to continuing TAP members
- Build policies and procedures to recognize high outreach achievers; doing so could motivate all TAP members to report their volunteer hours timely and accurately.

Activity Report Analysis

Committee members expressed challenges using the current activity report form and shared best practices that they and their members have started to use. This includes using their cell phone calendars to remind them of activities already conducted, as well as being sure to record time weekly rather than waiting until the end of the month. Cedric Jeans mentioned how the InfoPath will allow members to input their hours via a SharePoint site in the future.

Chair Duties

The chairs collectively decided that the following would assist them and future committee chairs:

- * Create a training session for chairs after the face to face meeting; make sure the chair knows how to conduct a meeting; reinforce the legal responsibility of the chair
- * Represent your committee's interest
- * Open communication with your committee analyst
- * Advocate for your referrals when presenting them to the JC; learn how to present reports to the JC – this includes having referrals submitted timely to the JC for review, attaching any research related to the referral
- * How to present JC findings back to your committee
- * Make sure the chair understands the issue processing flow chart
- * How to handle non-engaged members and documentation

Action 5: Create training for committee chairs and vice-chairs

Annual Report

A template was dispersed for the members to visualize how their annual report chair reports should be structured and discussion on how to write.

Actions Items & Points of Clarification

- Action 6:** Determine at what point should the Subject Matter Expert (SME) be involved to assist the committee on whether the project is viable?
- Action 7:** Cedric Jeans will organize how TAPSpace can be utilized so all members can see all committee's current work.
- Action 8:** Invite members with specific skillsets to committee meetings even if not their assigned committee.
- Action 9:** All work can be done on TAPSpace and conference calls.
- Action 10:** Post the TAP Newsletter to Facebook groups that are looking into specific tax issues of topics.
- Action 11:** Identify an International tax SME from IRS.
- Action 12:** All recommendations that are not adopted for budget reasons should be held in a repository for later review.
- Action 13:** Establish a uniformed TAP member email account for each state that can transition from retiring member to the new TAP member. i.e. NorthDakotaTAPMember@improveirs.org
- Action 14:** During roll call, have the administrative staff call by committee. i.e. "Toll-Free Committee." "Tim Bolin here. Alice Azarro here" "Tax, Form and Pubs." Kathy here for John".
- Action 15:** Your JC report can be written in such a way that it can serve as your article in the newsletter.
- Action 16:** Determine if it required that a motion be made to accept or reject the minutes of a previous meeting?

Action 17: Change terminology on referrals: “Reject” is now “Non-Adopt” and “Accept” is now “Adopt”.

Closing

Hernandez closed the meeting.

Day 2

Welcome, Review Agenda

Javier Hernandez opened the meeting and welcomed everyone.

Conference Line Roll Call

Darren Hamilton – Tax, Forms and Publications

Debra Awalt – W&I

Saul Hernandez – Systemic Advocacy

Tamara Birts – Systemic Advocacy

Terry Parks-Thompson – Return Integrity and Compliance Services (RICS)

Andrea Snyder – Online Services

Rose Smith – Online Services

Systemic Advocacy Update – Tamara Birts

Systemic Advocacy Management System (SAMS) is broken down into three main parts:

- * Information gathering projects.

Future Analysis projects are typically 1 year in duration

Type 2 projects are typically 90 days and have an action plan

- * Immediate intervention are issues that are worked within 3-5 days
- * General work are advocacy projects

TACS – There are four offices that have moved into Social Security offices.

Hackers are stealing information from tax professionals; the NTA has authorized LTAs to outreach to tax professionals about TAS’ process for reporting these types of breaches. So what is the IRS doing to promote the TAC appointment process? This will likely become a TAP request from the IRS in FY18. There is also an issue of consistency in security guard procedures in buildings where TACs are located.

Retirement levies have now been readjusted to a 20 percent maximum of the taxpayers income. IRS will begin revoking passports for individuals who owe back taxes.

Action 18: Obtain information on how many people may be affected by the passport revocation? No response has been given by Small Business/Self Employed Collection Policy.

W&I SME Updates

Debra Awalt – W&I is soliciting from the business units for potential topics for FY18. They would like to add eight projects for next year (funding dependent) including increasing e-filing of business returns, ID theft and how budget cuts can affect the toll-free lines. The phone system is currently being updated. Some features include phone recording as well as other software and hardware updates. There will not be a call back feature at this time. The timeline of completion for this project is not known, but will not occur during filing season. Ramsey would like to know what does upgrade entail and would like the full specifications on what is being done.

Action 19: Obtain phone system update details with full specifications.

Andrea Snyder and Rose Smith – Online Services is working on an online account product that is growing and adding features every nine weeks since November 2016. Payments, payment options, Adjusted Gross Income, filing status are some items that have been added. More than two million taxpayers are using the service and this has yielded 30,000 new installment agreements. This has been a soft launch and has not been widely advertised. Questions were raised as to whether there are plans for an online Power of Attorney (POA) so that tax professionals can use these services for clients; and as other YouTube videos are made available, will links be included to direct taxpayer to online services and how will that be tracked?

Action 20: Find out if there are plans for an online POA for tax professionals.

Action 21: Find out if links will be included to direct taxpayers to online services and how will that be tracked?

Darren Hamilton – The style Guide for Tax, Forms and Publications will be made available for TAP analysts and members from year to year (Pub. 5206). For translation, the IRS has Spanish speaking and writing tax law specialists (TLSs) for these specific needs. There is the possibility of adding translation software, but that is a budgetary issue. Analysts and members should always remember to use www.plainlanguage.gov as a reference when writing referrals.

Terri Parks-Thompson – RICS has reported 376,000 ID thefts in 2016. In the first five months of 2017, that figure is 107,000 and fraudulent returns are down 50 percent. However, there were 250 million business email compromises in that same time period.

Member Training

The chairs of the committees recommended that the program office provide New Member Training in addition to the Face-to-Face meeting and quarterly meetings. Topics that should be discussed are:

- * Informing members about the independence of the work.

- * Give members knowledge of what each committee does; i.e. subcommittees and, quality review committees, and possibly introduce these elements during the interview.
- * Include the role of the chair and vice-chair in the welcome package prior to the Face-to-Face meeting.
- * Travel arrangements/meals/etc.
- * Use WebEx for this training with camera use.
- * Provide access to TAPSpace prior to the Face-to-Face meeting.
- * Have third year members leave an article in the newsletter welcoming the new members.
- * Include diversity training.

Action 22: Consider the above topics for new member training

Items that should be covered at the Face-to-Face:

- * Updates on current recommendations and issues
- * Issue processing flow chart (using visual and interactive demonstrations)
- * Screening committee responsibilities
- * Emphasis on using the Taxpayer Bill of Rights (TBOR) in each referral
- * Any new members that cannot attend Face-to-Face should have a phone training with returning members
- * Elect subcommittee leads at the same time as the chair

Action 23: Consider adding the above topics to Face-to-Face meetings

Best Practices

- * Conduct exit interviews to ascertain why members are not participating or resigning
- * Get members to list their strengths and weaknesses (possibly add this to the interview process)
- * Identify the member's preferred method of communication (text, phone, email)
- * Give the option of changing committees if it's not a good fit (limit this action)

Chair Election Planning

Thompson will conduct this process with the assistance of Swayzer.

Action Items

Smith will type the minutes and actions items will be identified in that document.

Closing



Hernandez closed the meeting.

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



**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
July 26, 2017**

Designated Federal Official (DFO)

- Susan Jimerson Acting TAP Director
- Sheila Andrews Deputy Director CSO

Members Present

- Kent Christensen National TAP Chair
- Sallie Mullins Thompson National TAP Vice-Chair
- Kathy Jenks Chair, Tax Forms and Publications Committee
- Ralph Bennett Chair, Notices and Correspondence Committee
- Timothy Bolin Chair, Toll-Free Phone Line Committee
- Mary Florence Chair, Special Projects
- Angel Hower Chair, Internal Communications
- Angela Spain Vice Chair, Notices and Correspondence Committee
- Bill Mason Vice Chair, Tax Forms and Publications Committee
- Scott Hall Vice Chair, Taxpayer Communications Committee
- Alice Azzaro Vice Chair, Toll-Free Phone Line Committee
- Angela Spain Vice Chair, Notices and Correspondence Committee

Members Absent

- Holly Hoffman Chair, Taxpayer Assistance Center (TAC) Committee
- Sheila Olsen Chair, Taxpayer Communications Committee
- Sophia Sakoff Chair, Special Projects Committee

Staff

- Cedric Jeans Chief, TAP East
- Lisa Billups Sr. Program Analyst
- Gretchen Swayzer Sr. Program Analyst
- Robert Rosalia Program Analyst
- Otis Simpson Program Analyst
- Antoinette "Toni" Ross Program Analyst
- Fred Smith Program Analyst
- Matthew O'Sullivan Program Analyst
- Gilbert Martinez Program Analyst
- Tamikio Bohler Analyst, SB/SE
- Betty Scott Analyst W&I
- Karin Rice Public Affairs Specialist, W&I
- Kevin Brown Management Assistant

Welcome, Review Agenda



Susan Jimerson opened the call and welcomed everyone.

Roll Call

Quorum met.

DFO/National Office Update

Jimerson reported the interview phase is complete and we are moving into the recommendation phase of the recruitment process. Recommendations are being sent to the TAP Director and we are working on background checks. Travel arrangements for the face-to-face meeting are being done by Kevin Brown, your point of contact.

The All TAP meeting will be held on Monday, July 31, 2017, at 2 p.m. EST. Andrews thanked everyone for all of their hard work in the committees. Andrews reported that the chairs or designees will be meeting during the face-to-face. Please canvass your committee to see what they want to focus on next year. This will help to put the agenda together for the meeting. We are fortunate to have it face-to-face since its budget driven.

TAP Managers Update

Jeans reported that Billups sent a link regarding exam training and this is a way to learn more about this process. Jeans said each member should expect this email so they can learn more about the overall IRS process.

Approval of June Meeting Minutes

Thompson motioned, Hower seconded; minutes accepted as submitted.

TAP Chair Report

Christensen reminded the chairs of the process of getting referrals approved. We have to stick with the current process and if referrals are late, they will be reviewed by the JC the next month. The referrals have to go through Attorney Advisors, other IRS Stakeholders, and to the JC Quality Review (QR) to be reviewed in an orderly fashion.

TAP Vice Chair Report

Thompson reported that for the newsletter she reviewed the number of audience reached with outreach events. These numbers won't be included in the newsletter. The Toll-Free committee reached over 100,000; Tax Forms and Publications committee reached over 20,000; and Notices and Correspondence reached about 15,000.

Thompson reported there will be a phone call between Outreach and Internal Communications committees pertaining to social media issues. Both committees will be working on the virtual outreach flyer, which can be used as an outreach user manual. Christensen mentioned the JC will still have their regular monthly meeting via teleconference in August which is separate from the face-to-face meeting.

Public Comments

N/A

Project Committee Review/Activities

Taxpayer Assistance Center Improvements, Chair – Holly Hoffman

Billups reported the transcript subcommittee is wrapping up the FAQ referral and its content. The plan is to present the referral to the full committee in August. A new issue assigned to the subcommittee has a goal to identify verification alternatives such as certified acceptance agents and working with the State Department to reduce traffic to TACs. This is being evaluated to see if it can be a referral for the committee.

The online services subcommittee is finalizing their project about ideas of how to better market these services. They have come up with some interesting ideas such as marketing different online tools, providing consistency in links, titles and location of information on the site www.irs.gov. Hopefully will be writing up referral for next month's meeting.

Taxpayer Communications (TCC) Chair – Sheila Olsen

Scott Hall reported Subcommittee 1 is working on issue regarding 20 percent of those eligible for Earned Income Tax Credit (EITC) are not filing for it. Demographic data from SME's is being researched to figure out the best way to reach out to these taxpayers. All the data is being reviewed to address this issue in great detail to formulate a good proposal. Most taxpayers don't know or don't understand how this credit is framed.

Subcommittee 2 is gathering data from their SME regarding social media and newsletters and how the IRS uses it to get information out.

The screening committee reviewed eight issues: four stayed in parking lot; three were dropped because they were not TAP issues; and one issue was referred to the TAC committee.

Ninety-one percent of outreach reports were received timely. One member is expected to resign from the committee soon. Hall recognized Olsen, Sowell and Hall for their outreach efforts. Hall recognized Debra Awalt being instrumental in helping the committee get the information that Subcommittee 1 needed. The committee really appreciated the praise she gave the committee for their efforts.

Toll-Free Lines, Chair – Timothy Bolin

Bolin recognized his committee for having the most outreach and credited Daniel Persons for the bulk of that work. Bolin recognized Alice Azzaro for being elected as the new committee Vice Chair. Bolin reported that Subcommittee 1 is working on Issue 35872, which is identifying ways to move taxpayers who use the phone system to use online services instead and how to help them with this. This issue is still being worked. Subcommittee 2 has finished their referral and has sent it to the Attorney Advisor and QR for review. The referral will possibly be ready for the next JC meeting.

Bolin spoke about a new Issue 36206 that came from a complaint about toll free line. This may be related to 1099s and long wait times. This issue is being researched now. Bolin reported that 11 members are attending meetings. They are working on improving submission of activity reports and should be better with an active vice chair. Azzaro and Sowell attended tax forum and encouraged all members to take advantage of the opportunity to reach out in type of setting. The former vice chair, Kathy Davis, will stay on as a member and figure out how to work and do outreach when she can. The committee expects to have one referral for next month's meeting.

Notices and Correspondence, Chair – Ralph Bennett

Bennett reported the committee is working on Issue 36153 – why is follow up being requested by the IRS for a W-2 or 1099R that is easily matched the IRS. The focus will be on Letter 4464 C, which is just getting underway.

Issue 36245 – Is there a possibility to create a unique distribution code for form 1099R to indicate that the distribution was from a Qualified Charitable Distribution. We are preparing an invitation for a Subject matter expert (SME) for next week.

Issue 36227 – Looking at uniform use of social security numbers on forms rather than a mix of both the last four digits and the entire nine digits on correspondence. We are reviewing the Internal Revenue Manual (IRM) as it relates to the CP 21B and CP 22A. We have generalized this issue to how things are implemented in the IRM and if it's just a matter of pushing a change to the process out rather than asking for a change.

The last issue involves Letters 728 and 3220. These are different balance due letters and we are treating this as an edit because we don't think the new procedures are properly reflected in them.

Bennett reported that three members reached over 300 and outreach is going well.

Special Projects, Chair – Sophia Sakoff

O'Sullivan reported the ID Theft Subcommittee is working on how to better organize the ID Theft information the IRS has online. There is good information out there and available but just not well organized. They are working on three specific areas to include:

1. Flowcharts where taxpayers just looking for information about the subject and no ID theft is involved.
2. Taxpayers having ID Theft issues not impacting their taxes.
3. Taxpayers having ID Theft issues involving their taxes.

The international subcommittee is working issue regarding taxpayers having difficulty getting transcripts when they have an overseas request. Subcommittee is reviewing IRS response rejecting Issue 35165 to see if we want to pursue this issue further. We are setting up a meeting with an SME about this issue. An analysis is being done on an issue of possible contradictory information.



The committee is reaching out to the Local Taxpayer Advocate (LTA) for outreach opportunities.

Tax Forms and Publications, Chair – Kathy Jenks

Jenks reported that Sunny Luu resigned from TAP after moving for a new job. There are no referrals this month, but next month there will be at least four and as many as nine.

The four are:

- Schedule D;
- Babysitting and childcare treatment in Publication 17 and 525;
- Late incoming third party information on Form 1099 for Publication 17; and
- Information to be added to Publication 560 on retirement plans for small business and self-employed individuals.

The issues currently being worked are: Form 709 generation skipping transfers; Form 8965 ACA coverage exemption; numbers included in ordering various forms; the Form 941 mailing addresses; and directions for attaching form to the paper 1040 which are indications of federally withheld taxes but is not a requirement for electronic filers.

Jenks was impressed with today's news that the number of ID Theft is down by 50 percent which is a huge accomplishment.

Internal Communications, Chair – Angel Hower

Hower reported that the June newsletter is done and we are working on the July newsletter. Please respond in a timely fashion with your reports so this can be done as soon as possible. Christensen encouraged Chairs or designees to get articles out to be added to the newsletter. The newsletter is going to all members, alternates, www.TAPSpace.org and Facebook.

Round Table

Hall inquired about the 50 percent drop in ID Theft. This was attributed to unprecedented public private crackdown. Verified that next month's JC teleconference meeting is still going to occur in addition to the JC face-to-face planning meeting.

Jimerson encouraged the chairs to solicit ideas about the 2018 TAP year before the face-to-face meetings.

Bohler reported that they the IRS is currently in the process of working on VITA team reviews for Publication 412, which is training tools and a site reference for VITA sites and Publication 4491 which is pretty much the pink and ink changes to VITA training materials. The IRS really appreciates TAP's participation on these upcoming items.

Bohler will be attending the face-to-face planning meetings next month, but she will not be able to submit the approved IRS topics for 2018 before that meeting.

Closing



Jimerson closed the meeting.

**Next meeting: August 30, 2017
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
June 28, 2017**

Designated Federal Official (DFO)

- Javier Hernandez Acting TAP Director
- Sheila Andrews

Members Present

- Kent Christensen National TAP Chair
- Sallie Mullins Thompson National TAP Vice-Chair
- Kathy Jenks Chair, Tax Forms and Publications Committee
- Alice Azzaro Acting Vice Chair, Toll-Free Phone Line Committee
- Ralph Bennett Chair, Notices and Correspondence Committee
- Holly Hoffman Chair, Taxpayer Assistance Center (TAC) Committee
- Sheila Olsen Chair, Taxpayer Communications Committee
- Angel Hower Chair, Internal Communications
- Angela Spain Vice Chair, Notices and Correspondence Committee
- Mary Florence Vice Chair, Special Projects Committee
- Bill Mason Vice Chair, Tax Forms and Publications Committee
- Scott Hall Vice Chair, Taxpayer Communications Committee
- David Jones Vice Chair, Taxpayer Assistance Center Committee

Members Absent

- Timothy Bolin Chair, Toll-Free Phone Line Committee
- Sophia Sakoff Chair, Special Projects Committee

Staff

- Cedric Jeans Chief, TAP East
- Lisa Billups Sr. Program Analyst
- Gretchen Swayzer Sr. Program Analyst
- Robert Rosalia Program Analyst
- Otis Simpson Program Analyst
- Antoinette Ross Program Analyst
- Gilbert Martinez Program Analyst
- Tamikio Bohler Analyst, SB/SE
- Betty Scott Analyst W&I
- Debra Awalt Analyst W&I
- Rosemarie Rixey Policy Analyst W&I
- Karin Rice Public Affairs Specialist, W&I
- Kay Anderson Program Analyst W&I
- BJ Burleigh Management Assistant
- Kevin Brown Management Assistant



Welcome, Review Agenda

Javier Hernandez opened the call (1 p.m. ET) and welcomed everyone.

Roll Call

Quorum met.

DFO/National Office Update

Javier Hernandez thanked everyone for attending the call and expressed appreciation for the teamwork, outreach and the detail that the entire Panel works with on TAP issues. Hernandez reminded the panel of the Tax Forums that are coming up and identified Gilbert Martinez as the lead for this effort. The interviews for the recruitment process are almost complete. Fingerprinting and background checks are the next part of this process. We are trying to make the JC planning meeting in August a face-to-face meeting. This is still to be determined.

TAP Managers Update

Cedric Jeans reported Toll-Free has Alice Azzaro acting for Kathy Davis as Vice Chair. Jeans recommended everyone review the National Taxpayers Advocate's (NTA) 2018 Objectives Report. This could change or improve some of TAP's current projects and recommendations and should be reviewed closely. Jeans started a discussion thread for issues like this on TAPSpace and recommended that Panel members start discussion threads for important issues such as this in the future.

Approval of April Meeting Minutes

Bennett corrected page three, the last paragraph on the notices and correspondence section having duplicate sentences, which was eliminated. Thompson sent grammar and missing word corrections, not content changes, to Swayzer by email. Referral number 35892 refers to Letter 5747 and referral number 35772 to Letter 63-C and need corrections. Jenks motioned to approve, Thompson seconded. Motion carried.

Action Item: May Minutes accepted as amended.

TAP Chair Report

Christensen is requesting a response for members who can attend a possible face-to-face JC meeting in August so we can finalize plans. Christensen reported that he met with Maryclaire Ramsey, executive director of communications, stakeholder liaison and online services (CSO) and she is happy to have TAP join CSO.

TAP Vice Chair Report

Thompson reported that Jeans will be sending the June compilation of activity reports soon. Thompson reminded everyone to submit their monthly activity reports. The newsletter is being worked and we hope to have it out by June 30, 2017, according to Martinez. The Outreach Committee and the Internal Communications Committee are collaborating on virtual outreach. Both committees are working on language and social media options to be used by TAP members to get more visibility.

Public Comments

N/A

Project Committee Review/Activities

Taxpayer Communications (TCC) Chair – Sheila Olsen

Olsen reported that we are screening possible new issues. There is an acting lead for one subcommittee. We have 100 percent submission of activity reports. Scott Hall reached an audience of 5,200 this month. There are no recommendations coming forth this month.

Toll-Free Lines, Chair – Tim Bolin

Alice Azzaro reported Subcommittee 1 is working on educating and redirecting taxpayers to online services. This recommendation should be ready next month. Subcommittee 2 is working an issue concerning routing callers to call centers based on the phone number area code instead of the location the call originated. This issue is being finalized and a draft is expected to be ready for next month's meeting.

Notices and Correspondence, Chair – Ralph Bennett

Issue 34699 – ID Verification Notices has two letters – 5071-C and Letter 4883-C

Letter 5071-C offers an online option called ID Verify to update ID Theft information. This option is not available at the current time. Letter 4883-C has a telephone option to verify ID Theft information. This referral seeks to give taxpayers a better understanding of the timeframe for processing and that it may require multiple contacts to different offices within the IRS.

The referral changes some of the wording in the letters and the online section that speaks about this process on www.irs.gov. A correction was made to remove the parenthesis after the first time the words ID Theft were used within the written referral. Jenks motioned to approve with changes and Thompson seconded approval. Motion carried.

Action: Elevated to IRS with amendments.

Issue 35892 – Letter 5747C

This letter is used when the IRS knows there is an imminent threat to a taxpayer's personal information. The letter was not strong enough to encourage taxpayers to go to TACs to address this threat. The recommendation is that the taxpayer is made aware of serious ID Theft possibility in a nonthreatening way. We recommended three changes to help taxpayers know what their options are depending on whether they filed their taxes. Thompson motioned to approve, Hoffman seconded. Motion carried.

Action: Elevated to IRS as edited.

Issue 35772 – Letter 63C

This letter is to employers when an employee contacts IRS that they have been unable to obtain a W-2 or 1099-R from an employer. This referral recommends the addition of an option to indicate the minimum income reporting level has not been met and therefore no W-2 is required to be issued. A semicolon replaced a colon in the referral form after, “If your information is correct...” and a comma after the word “however” throughout the entire referral. Jenks motioned to approve, Thompson seconded. Motion carried.

Action: Referral approved to elevate to the IRS as amended.

Special Projects, Chair – Sophia Sakoff

Florence reported they are working on suggestions to improve clarity such as a flow chart or site map to make online access easier for people to find information.

Issue 35166 – SSNs for international taxpayers was rejected by the IRS. The committee accepted the decision after SME review, but may have a new issue from this at a later date.

Issue 35185 has come back from Systemic Advocacy and the Attorney Advisors, so hopefully it will be ready for next month.

Tax Forms and Publications, Chair – Kathy Jenks

Jenks reported that the committee rebutted three recommendations for the Form 1099-Misc for reconsideration and they were all accepted by the IRS.

Issue 35530 – Form 1040 Schedule A and B, we submitted 44 recommendations: Five accepted; 16 rejected; 19 partially accepted; and four were resolved prior to elevation.

Issue 35547 – Form 8867 and instructions had 29 recommendations: One accepted; 17 rejected; two partially accepted; and nine resolved prior to elevation. Some of the rejections occurred due to the committee not complying with the Tax Forms and Publications Style Guide. The issues resolved prior to elevation were due to the IRS already in the process of making the changes.

Issue 35251 – Form 8885 is to alert filers that the health coverage tax credit should be researched to see who accepts the credit first. Thompson motioned to approve, Mason seconded. Motion carried.

Action: Referral Elevated to the IRS.

Jenks reported the committee is working on babysitting versus childcare or daycare in Publication 17; late third party notices for Publication 17; and Schedule D. There may be three referrals for the next JC meeting.

Taxpayer Assistance Center Improvements, Chair – Holly Hoffman

Hoffman reported that the Transcript subcommittee is working on an FAQ sheet for universities to be able to easily identify and accept transcripts instead of rejecting them. A subject matter expert (SME) explained to the committee how the process of requesting a transcript online works. The entire subcommittee then made an online request themselves to better understand the process and see how they look. One member made this request via the phone. We will discuss the FAQ list during the next meeting.

The Online Services Subcommittee will review the links and online tools to see what titles can be catchier such as the RA, Retirement Account link. The committee reviewed why the Power of Attorney (POA) cannot be done online anymore. This will be reviewed in more detail with an SME.

Internal Communications, Chair – Angel Hower

Hower reported that we just got Administrative rights and will start posting on Facebook soon. An email will be sent to members to encourage them to join the page. The newsletter is being completed. Virtual outreach brochure is almost done.

Round Table

Hernandez spoke about the IRS strategic planning meeting for next four years for TAP last week. This meeting allowed us to comment on the goals and action items presented by the IRS and how it is trying to accomplish its goals in its Future State plan. The JC did TAP very well and IRS was very receptive of TAP's input. Hernandez is very excited about the future of TAP with all activities and the partnership with the IRS and has encouraged the JC to continue working hard and striving for TAP.

Closing

Hernandez closed the meeting. (2:08 p.m. ET)

**Next meeting: July 26, 2017
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 31, 2017**

Designated Federal Official (DFO)

- Javier Hernandez Acting TAP Director
- Sheila Andrews

Members Present

- Kent Christensen National TAP Chair
- Sallie Mullins Thompson National TAP Vice-Chair
- Sophia Sakoff Chair, Special Projects
- Kathy Jenks Chair, Tax Forms and Publications
- Tim Bolin Chair, Toll-Free Phone Lines
- Ralph Bennett Chair, Notices and Correspondence
- Holly Hoffman Chair, Taxpayer Assistance Center (TAC)
- Sheila Olsen Chair, Taxpayer Communications
- Angel Hower Chair, Internal Communications
- Angela Spain Vice Chair, Notices and Correspondence
- Mary Florence Vice Chair, Special Projects Committee
- Bill Mason Vice Chair, Tax Forms and Publications
- Scott Hall Vice Chair, Taxpayer Communications
- David Jones Vice Chair, Taxpayer Assistance Center (TAC)

Staff

- Cedric Jeans Chief, TAP East
- Susan Jimerson Chief, TAP West
- Lisa Billups Sr. Program Analyst
- Gretchen Swayzer Sr. Program Analyst
- Matt O'Sullivan Program Analyst
- Robert Rosalia Program Analyst
- Otis Simpson Program Analyst
- Antoinette Ross Program Analyst
- Gilbert Martinez Program Analyst
- Tamikio Bohler Analyst, SB/SE
- Rosemarie Rixey Policy Analyst W&I
- Karin Rice Public Affairs Specialist, W&I
- Kevin Brown Management Assistant
- BJ Burleigh Management Assistant

Welcome, Review Agenda

Javier Hernandez opened the call.



Roll Call

Kevin Brown

DFO/National Office Update

Hernandez thanked everyone for joining the call and thanked the Panel for all of the outreach they are doing. Hernandez spoke directly about outreach with the Governor of Puerto Rico. Hernandez reminded everyone to get approval for any outreach for which reimbursement will be sought to allow time for the staff to prepare the paperwork needed for this process. Hernandez gave update on recruitment efforts. Notifications have been sent to all applicants and interview panels are being established.

TAP Managers Update

Jeans recommended members go to www.irs.gov and subscribe to the e-news subscriptions to keep up on IRS news. Jeans spoke about preparing for Tax Forums starting in July. Jeans mentioned that we are getting close to interviews for the recruitment process. The hope is to complete this in June but it may go into July.

Jimerson reported Matt O'Sullivan is expected to return in the first part of July. Lisa Billups and Gilbert Martinez are covering the Special Projects committee. Jimerson reported that the Internal Communications committee had its first meeting on May 9, 2017. Angel Hower was elected chair and Leanna Wilson elected vice chair. The committee meetings will be the second Tuesday of each month at 2:30 p.m. ET.

Approval of April Meeting Minutes

- The word "called" was changed to "call" under the Welcome, Review Agenda section.
- Bill Mason motioned to approve; Thompson seconded the motion.

Action Item: April Minutes accepted as amended.

TAP Chair Report

Christensen spoke about the newly formed JC Quality Review (QR) team: Jimit Shaw, Joan Ogden and Kristin Peterson, with Susan Wennermark as the alternate member.

Christensen reports the Annual Reports, business cards and nametags should have been received or are on their way now.

TAP Vice Chair Report

Thompson reported that the new reporting mechanism for outreach is not quite ready so the old format will continue to be used for now. Thompson echoed the enthusiasm about the activity and outreach efforts. Reports are being posted on www.tapspace.org and one or two members outreach efforts will be highlighted each month in the Spotlight for Success section of the TAP Newsletter.

On the Internal Communications call, it was determined that the Outreach committee will have space on the newsletter and *Spotlight for Success* will be added. A reminder

will be sent to each member when anything is posted to www.tapspace.org. Swayzer suggested directing members to refer taxpayers requesting a copy of the Annual Report to www.improveirs.gov for an electronic copy.

Public Comments

N/A

Project Committee Review/Activities

Toll-Free Lines, Chair – Tim Bolin

Bolin reported that research is being done to get taxpayers to go online instead of to the TAC. Subcommittee 1 is trying to incorporate the Public Service Announcement (PSA) referral from last year into this process. Subcommittee 2 is trying to remove the connection between the caller's area code and the toll free line office a taxpayer is routed to. This is currently being worked.

Notices and Correspondence, Chair – Ralph Bennett

Ralph Bennett reported the committee is currently finalizing three referrals:

- Referral #34699
 - Letter 4883-C *Potential Identity Theft during Original Processing and*
- Referral #35892
 - Letter 5747-C *Potential Identity Theft During Original Processing with Online Option*
 - Both are being completed with assistance from Subject Matter Experts (SMEs). The program owner is anxious to receive them prior to the printing deadlines to make the changes.
- Referral #35772
 - Letter 63C *Potential Identity Theft during Original Processing TAC AUTH ONLY*
 - It is being completed with information from the SMEs and awaiting legal review.

The committee is also working on Form 5227 and the practical nature of the IRS providing courtesy envelopes accompanying IRS letters.

Special Projects, Chair – Sophia Sakoff

Sakoff reported that all members are now on www.tapspace.org. There are still two missing members that the staff will assist with. Jimerson and Andrews confirmed the attempts to deal with two missing members and we are starting the process to remove these members from TAP.

One subcommittee is working on ID Theft related issues and the other is working on international issues. The ID Theft subcommittee is currently at a standstill since it is such a broad issue, has security concerns and is currently being worked by the IRS.



The International subcommittee is very busy. Issue 35166 was rejected by the IRS. The purpose of this issue was to allow U.S. citizens living abroad to file tax returns prior to receiving a social security number and avoid penalties or interest. The committee will review the response in greater detail and determine the next response. Sakoff mentioned that another issue is in legal review and they may have just received a response from the IRS. This will be worked later.

Tax Forms and Publications, Chair – Kathy Jenks

Because they have already been elevated to the IRS, the committee voted to approve Issues 35530 and 35547.

Action Item: Thompson motioned; Mason seconded. Issue approved as submitted.

Jenks indicated they have an unresponsive member who resigned and are working with an alternate now. Jenks reported that Issues 35520 and 35519 were approved at the last JC meeting relative to the 1099-Misc and 1098-T forms. The IRS response has been received and the committee is preparing a rebuttal to some of issue 35520. The IRS accepted 11 of 22 recommendations on issue 35520 and two of 12 recommendations of issue 35519.

Jenks reported the committee is awaiting a response for the two issues just approved by the IRS soon. The committee is now working on Issue 35898 Publication 974 *Premium Tax Credit (PTC)* and Issue 35899 on Form 3115 *Application for Change in Accounting Method*. Publication 974 had mostly minor changes. Form 3115 is pretty burdensome to the taxpayer with an estimated 80 hours needed to complete the form from start to finish. This is time consuming and can be expensive. The committee has suggested separating the form according to taxpayer type or funding amount to simplify this process. Issue 35898 has 27 recommendations and Issue 35899 has 49 recommendations. The JC QR team reviewed these and made minor changes and suggestions for Issue 35899.

Action Item: Thompson motioned, Jenks seconded to accept with minor changes for elevation to the IRS.

Jenks reported the screening committee is reviewing 18 issues to include making sure the Publication 17 is available to taxpayers. Form 8885 Health Coverage Tax Credit is being reviewed to simplify the instructions. On Form 1040 Schedule D and instructions, the treatment of babysitting and other hobby income will be reviewed. Jenks thanked her committee for all they have done.

Taxpayer Assistance Center Improvements, Chair – Holly Hoffman

Hoffman reported the committee lost a member, but they are continuing their work. The transcript subcommittee is working the issue of universities not accepting transcripts as authentic. The committee is looking to create an FAQ sheet to show what transcripts look like for the universities and help them to easily identify a transcript.



The online services referral is looking to improve awareness for online services. The committee is reviewing title changes for the site to make them a bit catchier. The IRS is changing the site, which has to be considered with our work. The committee is working with an SME on this issue.

Taxpayer Communications (TCC) Chair – Sheila Olson

Olsen reported that Subcommittee 1 has not met yet but will meet soon. Subcommittee 2 is still working lots of questions. Research is being done including how the www.irs.gov site will be changed. Issue 35819 Refundable Credits communications and 35874 IRS General Communications are what the committee is working on at this time. The members are currently working with SMEs for these issues. Olsen reported only two activity reports are missing. Despite this, the committee has a total of 54.3 TAP hours, 38.5 outreach hours, and 261 audiences reached. Full committee meeting is scheduled for tomorrow, June 1, 2017. Issue 31082 mail tracking was rejected by the IRS and will be reviewed during the meeting.

Internal Communications, Chair – Angel Hower

Jimerson reported that the chair and vice chair were elected. The direction of the newsletter and updating the Facebook page was discussed. The newsletter format was discussed and the format used last year is preferred. Thompson suggested Outreach Committee and Internal Communication work on social media together to ensure unity of message. Jeans suggested a call between Thompson and Hower to start this process.

Round Table

Thanks to all of the committees for all of the work they are doing, it is very impressive.

Jeans thanked everyone on the call and the veterans for their service. Hernandez thanks everyone for all their efforts.

Closing

Hernandez closed the meeting.

**Next meeting: June 28, 2017
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 26, 2017**

Designated Federal Official (DFO)

- Sheila Andrews TAP Director

Members Present

- Kent Christensen National TAP Chair
- Sallie Mullins Thompson National TAP Vice-Chair
- Sophia Sakoff Chair, Special Projects Committee
- Kathy Jenks Chair, Tax Forms and Publications Committee
- Timothy Bolin Chair, Toll-Free Phone Line Committee
- Angela Spain Vice Chair, Notices and Correspondence Committee
- Mary Florence Vice Chair, Special Projects Committee
- Bill Mason Vice Chair, Tax Forms and Publications Committee
- Scott Hall Vice Chair, Taxpayer Communications Committee

Members Absent

- Ralph Bennett Chair, Notices and Correspondence Committee
- Holly Hoffman Chair, Taxpayer Assistance Center (TAC) Committee
- Sheila Olson Chair, Taxpayer Communications Committee

Staff

- Cedric Jeans Chief, TAP East
- Susan Jimerson Chief, TAP West
- Lisa Billups Sr. Program Analyst
- Gretchen Swayzer Sr. Program Analyst
- Gilbert Martinez Program Analyst
- Matt O'Sullivan Program Analyst
- Robert Rosalia Program Analyst
- Otis Simpson Program Analyst
- Tamikio Bohler Analyst, SB/SE
- Sheila Stevens-Brown Program Analyst, W&I
- Catherine Parker Public Affairs Specialist, W&I
- Kevin Brown Management Assistant
- BJ Burleigh Management Assistant

Welcome, Review Agenda

Sheila Andrews opened the call (1 p.m. ET) and welcomed everyone attending.

Roll Call

Kevin Brown

DFO/National Office Update

Andrews thanked members for their service since this is National Volunteer Week. Andrews introduced Javier Hernandez as the Acting TAP Director and reported that the official start date will be May 14, 2017. Andrews congratulated the Annual Report team for having report ready in February and indicated that we are waiting for publishing which should have it to us by May 5, 2017. Andrews mentioned that the Continuing Resolution expires at midnight on Friday, April 28, 2017. In case there is a shutdown, precautions have to be taken because we will not be able to do any TAP business, but we will keep you posted.

TAP Managers Update

Cedric Jeans also thanked Panel for all the work they do as volunteers. Jeans reported that the Virtual Outreach Initiative will be a topic during the next Outreach Committee meeting. Keep a lookout for that. Susan Jimerson also thanked Panel for all support given to the TAP program. Jimerson introduced Gilbert Martinez as lead analyst to the Outreach and Internal Communications Committees. Jimerson reported that the Internal Communications Committee will meet on May 9, 2017, at 2 p.m. ET.

Approval of March Meeting Minutes

Gretchen Swayzer made corrections to the March minutes as follows:

- Page 1, Angela Spain added as present;
- “Jenks-Harm” was changed to “Jenks” throughout the document;
- All double spaces were changed to single spaces;
- Page 3, “the minutes were approved with changes” was added to October minutes approved section;
- Vice-Chair report paragraph format change and “plac” correct to “place”; “cold” corrected to “could”;
- Page 4 “1098-Misc” was changed to “1099-Misc”; “May” was changed to April and has already been submitted to the IRS in draft form; fourth paragraph changed to, “As a result, would like to see the establishment of a holding mechanism to accumulate all of these ideas from all committees to be available to future committees and to the IRS.” Fifth paragraph, “them” changed to “...then not being accepted by universities because of questions of legitimacy.”
- Page 5, paragraph 4, line 3 the word “due” was changed to “to” in the sentence.
- Page 3, paragraph one, a period was placed in the third sentence after, “sent minor changes to Kim” and “Kim” was replaced with “Vinci.”
- Thompson suggested that the referral numbers be included when discussing each referral being worked. Swayzer will add.

Kathy Jenks made a motion to approve the minutes as amended, Thompson seconded the motion.

Action Item: March Minutes accepted as amended

TAP Chair Report



Christensen echoed the appreciation of all the members of the committee for the work they are doing this year. Has been attending most of the committee calls and if you don't want him on the call, just let him know. Christensen welcomed Hernandez as he comes to TAP.

TAP Vice Chair Report

Thompson reported that Jeans is working on a reporting mechanism for the committee which will be presented soon. The agenda is being worked for the first Outreach Committee meeting for tomorrow. Thompson would like to be a part of the Internal Communications Committee and will speak to Jimerson about this. Thompson spoke to Robert Rosalia about the Outreach Spotlight Section on www.tapspace.org which is something that will be used to recognize TAP members who do extraordinary outreach.

Public Comments

N/A

JC Quality Review (QR)

Jenks thought Christensen captured the recommendations for the QR team very well, and especially likes the idea of members being non-chairs. Jenks also suggested that there be backup members in case something happens with one of the three-member team. Christensen stated possibly one alternate for this team. Thompson made a motion to approve the outline as described with one alternate to make up the JC Quality Review Team; Jenks seconded the motion.

Action Item: Outline for JC QR Team accepted

Christensen will send an email to solicit members for this team.

Project Committee Review/Activities

Notices and Correspondence, Chair – Ralph Bennett

Angela Spain reported the committee had an administrative meeting in April 13, 2017 due to not meeting the notice requirement date. Subcommittee 1 is working an Issue 34699 dealing with ID verification notices. They are working on comments from the Attorney Advisors and the Subject Matter Experts (SMEs). They are also working on Issue 35892, which came from the IRS, for a more serious letter where large data breaches are known to have occurred. Subcommittee 2 is working on a letter to inquire why an employer did not send a W-2 or 1099 to an employee. The letter does not include the option of whether the minimum income reporting level was met. The committee is currently drafting referrals for these issues.

Spain reported they are working Issue 28746, request of tax returns for trusts that are not yet funded. They also have an Issue 34716 in the parking lost regarding the size of envelopes they hope to address in the next month or two.

Special Projects, Chair – Sophia Sakoff

Sakoff reported the ID Theft subcommittee has submitted questions to IRS and working with O'Sullivan to possibly have IRS SME meet with them for guidance on current processes so the committee knows how to proceed with referrals. Mary Florence reported the International Subcommittee is working on Issue 31853 from last year and will soon have it on the agenda for committee review.

Sakoff reported one committee member still doesn't have access to TAPSpace and Jimerson and O'Sullivan will follow up. Sakoff questioned the process for members Missing In Action (MIA). Andrews reported that MIA members are being addressed by staff. We try to contact them and do some research to ensure everything is alright and not just a short term issue. If they cannot participate we see if they will submit resignation. Since the MIA member was to be on the Internal Communications Committee, another member will need to replace them. This will be worked by Jimerson offline.

Tax Forms and Publications, Chair – Kathy Jenks

Jenks reported that the committee met with SMEs during administrative full committee meeting about fillable forms which is an ongoing project. The committee had two referrals that were completed over the winter regarding the 1098-T and the 1099-Misc., both requested by the IRS. They were approved at the Face-to-Face meeting in March and submitted to the IRS as drafts. We received the following responses from the IRS:

- Issue 35519 – 1098-T, *Tuition Statement*. Two of 12 recommendations were accepted.
- Issue 35520 – 1099-Misc, *Miscellaneous Income*. Eleven of 22 recommendations were accepted.

Jenks stated JC can review and approve entire referrals or Tax Forms and Publications and look at the ones we may want to reconsider and resubmit. Christensen suggested since a response already received, JC should review and approve as submitted.

Bill Mason made a motion to approve the referral as submitted; Thompson seconded the motion.

Action Item: Both referrals approved as submitted.

Issue 35530 regarding *Form 1040 Schedule A&B* and Issue 35547 regarding *Form 8867* were both sent to committee by IRS for review. Drafts have been submitted to IRS. They will be reviewed during the next full committee meeting and hope to submit to JC for action in May.

The IRS also requested the committee work on Issue 35898 – Publication 974, *Premium Tax Credit* and Issue 35899 – *Form 3115, Change and Accounting Methods*. These are very challenging as Issue 35898 has 74 pages to be reviewed, while Issue 35899 has an IRS estimated 82 hours to complete and file the form. The IRS has given



us a one month timeline (May 15, 2017) to complete which is almost impossible but we are working as expeditiously as possible.

Jenks reported the committee stressed the importance of outreach and would like to highlight one outreach event each meeting to provide others incentive.

Jenks reported that the Annual Report looks great and the current chairs should start compiling recommendations this year to be prepared when requested. Jenks reported that Rosalia developed a template for recommendations that they are currently using and this is helping to prepare for next year's annual report. Rosalia has also developed an inventory report for all of the projects from the parking lot, to active, to referred, to JC, to reviewing IRS responses. This helps the committee keep track of all of their projects. Jenks is willing to share these tools with other committees.

Taxpayer Assistance Center Improvements, Chair – Holly Hoffman

Billups reported that meeting participation rate is great. The transcript subcommittee is working on a draft referral recommending transcript FAQs to www.irs.gov. The Online Services subcommittee is working on how IRS can use social media to reach the public. Communications Stakeholder Liaison and On Line Services (CSO) provided information for our use.

Taxpayer Communications (TCC) Chair – Sheila Olson

Scott Hall reported that meetings scheduled on the fourth and fifth of the month had to be cancelled this month. Subcommittee 1 was able to meet and they are working on an issue from the IRS on how to reach out to the estimated 20 percent of taxpayers eligible for the Earned Income Tax Credit (EITC) and Education tax credit who fail to claim them. We are working with SMEs for more information about these taxpayers before we craft a strategy. The screening committee was able to get through all the issues on the report.

Toll-Free Lines, Chair – Tim Bolin

Bolin spoke about the committee's formal name. It is referred to differently so would like to know. Jeans and Andrews mentioned it will be provided to the committee. First subcommittee looked at what research we need to do because the lead was not able to attend. IRS asked us to look at issue dealing with the Future State on ways to get CSR's to encourage online options.

Subcommittee 2 is working proposal on area code based routing of calls for hours of operation. Since the move away from landlines to cell phones, area codes don't reflect where the person is calling from. Want to detach the area codes from the hours of operation. The full committee did not have any issues to discuss. Screening committee has not yet met.

Internal Communications, Chair –

Jimerson reported the meeting is scheduled for May 9, 2017, 2 p.m. ET.



Round Table

Andrews reported the Annual Report is on the website and available for viewing until we get hardcopies.

Closing

Christensen and Andrews closed the meeting (2:05 p.m. ET)

**Next meeting: May 31, 2017
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.