

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
October 22, 2020**

Designated Federal Official (DFO)

- Terrie English TAP Director

Members Present

- Laurie Brock Chair, Internal Communications Committee (ICC)
- Tracy Bunner Chair, Notices and Correspondence
- Lindsey Funair Chair, Taxpayer Communications Committee (Absent)
- Phillip “Phil” Kleiber National TAP Chair
- Robert “Bob” Moretti National TAP Vice-Chair
- Andrea Price Chair, Toll-Free Phone Lines Committee
- Stephen Selden Chair, Tax Forms and Publications Committee
- Thurston Smith Vice-Chair, Taxpayer Assistant Centers Committee (TAC)
- Nina Tross Chair, Taxpayer Assistant Centers Committee (Absent)
- Cheryl Williams Chair, Special Projects Committee

Visiting Members

- Donna Burris Member, Toll-Free Phone Lines Committee
- Martha Lewis Member, Tax Forms and Publications Committee

Staff

- Lisa Billups Program Analyst
- Kevin Brown Management Assistant
- Conchata Holloway Program Analyst
- Cedric Jeans TAP East Chief
- Susan Jimerson TAP West Chief
- Gilbert Martinez Program Analyst
- Rosalind Matherne Program Analyst
- Matthew O’Sullivan Program Analyst
- Antoinette “Toni” Ross Program Analyst
- Fred Smith Program Analyst
- Debra Awalt Program Analyst Wage and Investment (W&I)
- Michael Odom Program Analyst W&I

Members of The Public

None

Roll Call

Quorum was met for the meeting.

Welcome, Review Agenda

English welcomed everyone and opened the call at 1:30pm ET. Kleiber reviewed the agenda.

DFO/National Office Update

English reminded members to review www.irs.gov regularly because the IRS periodically updates it with new information. English also spoke about payments sent into the IRS and how it may be delayed with the pandemic and the delays with mail. English spoke about the possibility of penalties being assessed if taxpayers file late. There is also guidance about businesses that are closing and how collecting unemployment could affect a person's taxes.

English and Awalt reported that the IRS is currently catching up with the mail that is being processed. Awalt continued that some mail is still backlogged right now.

TAP Managers Update

Jimerson reported the first mentorship program meeting and how affective it was. Martha Lewis is the lead for this project. Jimerson told the committee that the solicitation for the first and second year members to select their project committees by October 30, 2020.

Jeans reported losing Alexas Pickron from Delaware and we will recruit from there again.

Approval of September 24, 2020 JC Meeting Minutes

After minor typos, cosmetic corrections and spelling errors corrected the minutes were accepted. Williams motioned; Price seconded.

Action: Minutes approved as amended.

TAP Chair Report

Kleiber reported everyone submitted their initial annual reports on time. Kleiber praised Matherne for leading the mentorship program call and said this will really improve the program and the onboarding process for next year.

TAP Vice Chair Report

Moretti spoke about suggestions for the slides and checklist for the mentoring program to be submitted to Martha Lewis. Moretti spoke about possibly using of Zoom. Moretti said we added an Overseas taxpayer folder to the Outreach Toolkit, please send any suggestions for this folder. Moretti reminded the committee of all the useful tools and information available on www.tapspace.org and how we should be sharing with taxpayers such as the COVID-19 Business tax relief toolkit, the deferred payroll tax obligations, and Economic Impact Payment for taxpayers experiencing homelessness by November 21, 2020. Moretti spoke of sharing this information with homeless shelters.

Public Comments

None

Project Committee Review/Activities

Special Projects

Issue 42967 Simplified Reporting for Overseas Taxpayers

The purpose of this referral is to simplify the filing requirements for many overseas taxpayers. This complies with Taxpayer Bill Of Rights (TBOR), The Right to Be Informed and The Right to a Fair and Just Tax System. Williams motion Brock seconded

Action Issue elevated to IRS for consideration

Issue 42978 Unfair Filing and Tax Costs for Non-Resident Citizens. The goal of this referral is to assure that overseas taxpayers have access to competent and affordably priced assistance in completing their US tax forms. Williams motioned; Brock seconded.

Action: Issue elevated to IRS for consideration

Issue 42996 IRS Not Respecting Mandatory Use of Registered Mail. This referral seeks to send mail certified to US territories and registered mail to all others for speed and tracking purposes. The TBOR- The Right to Be Informed; The Right to Quality Service; The Right to Challenge the IRS's Position and Be Heard; and the Right to a Fair and Just Tax System. Williams motioned; Selden seconded.

Action: Issue elevated to IRS for consideration

Issue 43054 IRS Accounts Made Dysfunctional for Non-Resident Americans. This referral seeks to make it as easy for non-resident taxpayers to access online accounts as domestic taxpayers. The TBOR rights affected are: The Right to a Fair and Just Tax System, The right to Be Informed; The Right to Quality Service and The Right to Privacy Williams motioned; Brock seconded.

Action: Issue elevated to IRS for consideration

Williams thanked the entire committee for doing a fantastic job on these referrals.

Toll-Free Lines

Issues 41899 IRS Navigation Guide and IRS Telephone Numbers Link. This referral is asking for the addition of a navigation guide to the IRS website. There is also a request to place the 800-829-1040 number be place as a footer on www.irs.gov. Price motioned; Smith seconded.

Action: Issue elevated to IRS for consideration

43632 Reposition Foreign Language Prompts on 1040 toll free line.
Price motioned; Bunner seconded.

Action: Issue elevated to IRS for consideration

Tax Forms and Publications

Referral Issue 43731 Form 1310 – Statement of Person Claiming Refund Due a Deceased Taxpayer. This referral is to add language and more specificity to help taxpayers fill this form out. Selden motioned; Williams seconded.

Action: Issue elevated to IRS for consideration

Taxpayer Assistance Center Improvements

Issue 40310 Title of the Project: Suggestion for Getting Transcripts. Smith reported it was recommended that this issue be made into two issues because the recommendations appeared unrelated. O'Sullivan explained their relation was allowing online ability to request these actions within a TAC so this referral will remain as submitted. Smith motioned; Brock seconded.

Action: Issue elevated to IRS for consideration

Internal Communications Committee

Brock reported newsletter came out and thanked members who helped put it together. Brock and O'Sullivan reminded the committee to turn in their reports for the next newsletter.

Notices and Correspondence

Bunner reported the committee is awaiting response for the referral for letter 3219C. This should be ready for the next JC meeting along with possibly two mor referrals.

Taxpayer Communications

Holloway reported the committee is working on issue 40613 which is still being worked. The committee is also working on a better way to communicate with the IRS online.

Round Table

N/A

Closing

English thanked everyone for a good meeting. English closed the call at 2:36 ET closed.

Next Joint Committee Meeting is November 19, 2020 at 1:30pm ET

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

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
September 24, 2020**

Designated Federal Official (DFO)

- Terrie English TAP Director

Members Present

- Laurie Brock Chair, Internal Communications Committee (ICC)
- Tracy Bunner Chair, Notices and Correspondence
- Lindsey Funair Chair, Taxpayer Communications Committee
- Phillip “Phil” Kleiber National TAP Chair
- Robert “Bob” Moretti National TAP Vice-Chair
- Andrea Price Chair, Toll-Free Phone Lines Committee
- Stephen Selden Chair, Tax Forms and Publications Committee
- Nina Tross Chair, Taxpayer Assistant Centers Committee (TAC)
- Cheryl Williams Chair, Special Projects Committee

Visiting Members

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

Staff

- Lisa Billups Program Analyst
- Kevin Brown Management Assistant
- Cedric Jeans TAP East Chief
- Susan Jimerson TAP West Chief
- Gilbert Martinez Program Analyst
- Rosalind Matherne Program Analyst
- Matthew O’Sullivan Program Analyst
- Antoinette “Toni” Ross Program Analyst
- Fred Smith Program Analyst
- Debra Awalt Program Analyst Wage and Investment (W&I)
- Michael Odom Program Analyst W&I

Members of The Public

None

Roll Call

Quorum was met for the meeting.

Welcome, Review Agenda

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

DFO/National Office Update

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

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

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

TAP Managers Update

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

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

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

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

August 27, 2020 minutes. Kleiber motioned Williams

Action: Both sets of minutes approved as submitted.

TAP Chair Report

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

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

TAP Vice Chair Report

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

Public Comments

None

Project Committee Review/Activities

Notices and Correspondence

39747 ITIN Rejection Notice CP567

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

Action: Issue elevate to IRS for consideration.

43347 CP2000 Notice and Paragraph Language

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

Action: Issue elevated to IRS for consideration

43573 Letter 3219C Notice of Deficiency

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

Action: Issue elevated to IRS for consideration

Taxpayer Communications

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

Action: Issue elevated to IRS for consideration.

40485 IRS Tax Calendar

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

Action: Issue elevated to IRS for consideration

41883 Official, Tax Lien Payoff

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

Action: Issue elevated to IRS for consideration

Toll-Free Lines

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

Action: Issue elevated to IRS for consideration

43463 Area Code Added to Voice Response Unit

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

Action: Issue elevated to IRS for consideration

Special Projects

41749 Delays in delivery of correspondence to overseas taxpayers.

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

Williams motioned; Tross seconded.

Action: Issue elevated to IRS for consideration

Tax Forms and Publications

42161 Estimated Tax Worksheet

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

Selden motioned; Bunner seconded.

Action: Issue elevated to IRS for consideration

Taxpayer Assistance Center Improvements

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

Internal Communications Committee

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

Round Table

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

Closing

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

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

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

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
August 27, 2020**

Designated Federal Official (DFO)

- Terrie English TAP Director

Members Present

- Laurie Brock Chair, Internal Communications Committee (ICC)
- Tracy Bunner Chair, Notices and Correspondence
- Lindsey Funair Chair, Taxpayer Communications Committee (Absent)
- Philip “Phil” Kleiber National TAP Chair
- Robert “Bob” Moretti National TAP Vice-Chair
- Andrea Price Chair, Toll-Free Phone Lines Committee
- Stephen Selden Chair, Tax Forms and Publications Committee
- Nina Tross Chair, Taxpayer Assistant Centers Committee (TAC)
- Cheryl Williams Chair, Special Projects Committee

Visiting Members

- Donna Burris Member, Toll-Free Phone Lines Committee

Staff

- Lisa Billups Program Analyst
- Kevin Brown Management Assistant
- Conchata Holloway Program Analyst
- Susan Jimerson TAP West Chief
- Antonia “Toni” Keeling Program Analyst
- Gilbert Martinez Program Analyst
- Rosalind Matherne Program Analyst
- Matthew O’Sullivan Program Analyst
- Robert Rosalia Program Analyst
- Antoinette “Toni” Ross Program Analyst
- Fred Smith Program Analyst
- Debra Awalt Program Analyst Wage and Investment (W&I)
- Cynthia “Cindy” Jones Program Analyst W&I
- Michael Odom Program Analyst

Members of The Public

None

Welcome, Review Agenda

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

TAP Chair Report

Skipped report due to the planning meeting earlier this week.

TAP Vice Chair Report

Passed on the report due to planning meeting earlier this week

Roll Call

Quorum was met for the meeting.

DFO/National Office Update

English reported:

There will be report out changes from the Federal Advisory Committee Act coming soon. These changes will make more of the TAP information such as meeting information and minutes available to the public. Once they are finalized, English will provide them to the committee. English thanked everyone for attending the JC Planning meeting earlier this week.

TAP Managers Update

Jimerson reported:

Last year the ICC and Outreach committees worked together to develop a social media guide. This has information on how to setup and start social media guides and establishing a social media presence. This will be posted in the Outreach Toolkit on www.tapspace.org. Ask Jimerson if you have any questions. The TAP logo will be discussed for the new TAP website that is being developed.

Approval of July 23, 2020 JC Meeting Minutes

Minutes approved as submitted. Kleiber motioned; Williams seconded.

Action: Minutes are approved as submitted.

Public Comments

None

Project Topic

- TAP BYLAWS – need to approve

Page 4 Section C Leadership paragraph two:

When there are more than 2 candidates running for the same position, the winner is declared by plurality voting (the person with the most votes). When there are less than 2 candidates running for the same position, the winner must win by a simple majority more than half the votes casted).

Page 5 Section V C. Decision Making Process

Clarification on Consensus decision making definition pertaining to voting. Price asked, If the decision-making process is done by consensus, why are we making motions and seconding them to make votes? This question will be sent to legal for clarification. Kleiber motioned; Tross seconded.

Action: Question sent back to legal for clarification.

- TAP LOGO – need to make a choice

First Choice: Unanimous decision

Second Choice: No votes

Project Committee Review/Activities

Tax Forms and Publications

Selden reported:

41886- Dropped by committee.

42047- Reporting Dividends on Form 1040/1040-SR and Schedule B
Change proposed to allow qualified dividends to be calculated correctly on form.
Submitting taxpayer's contact information removed from the referral.
Selden motioned; Brock seconded
Action: Issue elevated as amended to IRS for consideration

42066 Reporting Social Security Benefits
Change proposed to simplify social security benefits calculations. Kleiber motioned; Brock seconded
Action: Issue elevated to IRS for consideration

42148 Suggestion for Worksheet Update
Proposed technical change regarding marriage to resident alien or nonresident alien proposed for clarity. Kleiber motioned; Tross seconded
Action: Issue elevated to IRS for consideration

42173 Form 2210 Instructions Line 8 Calculation Omission for 1040
Changes proposed to allow calculation of underpayment of estimated taxes to be accurate. Date approved by committee added to referral. Kleiber motioned; Brock seconded
Action: Issue elevated to IRS for consideration

Notices and Correspondence

Bunner reported:
Referral Issue 40908 Improve Notice Language (CP515)
Change suggested to take redundant wording out and shorten the document by one page.
Project committee approved date added. Bunner motioned; Williams seconded.
Action: Approved to elevate to IRS

Bunner reported there will be a referral to change the CP2000 that will be sent to the JC next month. They will be sending a recommendation to the Tax Forms and Publications committee regarding this issue also.

Taxpayer Communications

Funair reported:
Issue 37272 IRS Communications for Military Personnel
The recommendations are to improve military member's ability to comply with their tax obligations. Funair motioned; Brock seconded
Action: Issue elevated as submitted

Special Projects

N/A

Toll-Free Phone Lines

Price reported the committee has an issue related to the 1040 phone line tree. They are checking to see if that should be listed on the www.irs.gov website.

Taxpayer Assistance Center Improvements

N/A

Internal Communications Committee

N/A

Round Table

N/A

Closing

English thanked everyone for all the hard work that they give to this committee. The work is appreciated. English closed the meeting.

Next Joint Committee Meeting is September 24, 2020 at 1:30 p.m. ET

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

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Planning Meeting Minutes
August 25, 2020
Day 1**

Designated Federal Official (DFO)

- Terrie English TAP Director

Members Present

- Laurie Brock Chair, Internal Communications Committee (ICC)
- Tracy Bunner Chair, Notices and Correspondence
- James “Jim” Buttonow Vice-Chair, Taxpayer Communications Committee
- Phillip “Phil” Kleiber National TAP Chair
- Robert “Bob” Moretti National TAP Vice-Chair
- Andrea Price Chair, Toll-Free Phone Lines Committee
- Stephen Selden Chair, Tax Forms and Publications Committee
- Nina Tross Chair, Taxpayer Assistant Centers Committee (TAC)
- Cheryl Williams Chair, Special Projects Committee
- Lindsey Funair Chair, Taxpayer Communications (Absent)

Visiting Members

- Hercules Analitis Member, Taxpayer Communications Committee
- Michael Avery Member, Special Projects Committee
- Patricia Anthony Member, Taxpayer Communications Committee
- Donna Burris Member, Toll Free Phone Lines Committee
- Edward Donovan Member, Taxpayer Assistance Centers Committee
- Joseph “Joe” Edelen Member, Toll-Free Phone Lines Committee
- Matthew “Ryan” Groff Member, Taxpayer Communications Committee
- John Hughes Member, Special Projects Committee
- Patrick “Pat” Kusiak Tax Forms and Publications Committee
- Martha Lewis Member, Tax Forms and Publications Committee
- Joseph “Joe” Magyar Member, Tax Forms and Publications Committee
- T. Renee Parker Tax Forms and Publications Committee
- Alexas Pickron Tax Forms and Publications Committee
- Thurston Smith Vice Chair, Taxpayer Assistance Centers
- Bruce Stratton Member, Tax Forms and Publications Committee
- Sandy Villella Tax Forms and Publications Committee

Staff

- Lisa Billups Program Analyst
- Kevin Brown Management Assistant
- Conchata Holloway Program Analyst
- Cedric Jeans TAP East Chief
- Susan Jimerson TAP West Chief
- Antonia Keeling Program Analyst
- Gilbert Martinez Program Analyst

- Rosalind Matherne Program Analyst
- Matthew O’Sullivan Program Analyst
- Robert Rosalia Program Analyst
- Antoinette “Toni” Ross Program Analyst
- Fred Smith Program Analyst
- Sheila Andrews Deputy Executive Director, Communications, Stakeholder Liaison and Online Services (CSO)
- Maryclaire Ramsey Executive Director, Communications, Stakeholder Liaison and Online Services (CSO)

Members of The Public

None

Welcome, Review Agenda

English welcomed everyone and opened the call. Kleiber thanked all who joined the call and explained this meeting is planning for the TAP 2021 year.

Roll Call

Quorum was met for the meeting.

DFO/National Office Update

Maryclaire Ramsey:

- Thanked members for their effort on the tax forums.
- National Taxpayer Advocate (NTA) put out a blog about Economic Impact Payment (EIP).
- The non-tool will be available from August 15-30, 2020.
- The non-filer tool will be open until October 15, 2020 for those who did not have to file.
- The IRS is reaching out to taxpayers to make sure they received their stimulus payments.
- The IRS is putting out information about Unemployment Insurance is being taxed.
- Local Taxpayer Advocates (LTAs) are hopefully working with TAP members.
- The contract has been extended with the TAP website conversion to complete this project as efficiently as possible.

Sheila Andrews:

- Appreciate the committee’s flexibility for the virtual meetings.
- The state of the IRS- some areas are open while other are still closed.
- Commissioner is asked those who have portable work to remain home for health safety reasons.

English reported:

Thank you for working with us during these troubling times.

TAP Chair Report

Kleiber reviewed the five discussion topics for today’s meeting which are:

- What has worked well and not so well this year in your committees?
- In general, has meeting attendance been satisfactory?

- Has the workload been evenly distributed or have a few members done most of the work?
- What will your committee focus be for 2021?
- Provide any ideas you might have to improve the panel's performance and productivity for 2021.

Kleiber thanked the entire panel for sticking with the TAP throughout this ordeal. Some members have jobs and family and they have still worked hard to stay with TAP. The Joint Committee has worked very well together this year. Kleiber thought that learning more about each committee member will allow for cross-pollination and full use of member's abilities and talents. Face to face gathering allows this process to work better.

Kleiber's Feedback for Improvement Opportunities:

- Discussion committee assignments - how are new TAP members assigned to a Project Committees? Jimerson explained new and returning members give the staff their top three preferences. Balance of new and returning with these preferences and needs of the six committees are how the assignments are made.
- Suggestion- looking at the current six Project Committee and consider making changes based on current issues taxpayers are faced with.
- Suggestion- we look at how issues affect the different taxpayer segments e.g. low-income, elderly etc.
- Suggestion we formalize a process in connecting TAP members with LTAs.
- Suggestion we assume going forward we will remain in a virtual environment and be better prepared to retrofit training for a virtual delivery versus face-to-face.

TAP Vice Chair Report

Moretti reported the attendance for the Outreach committee meetings has been tremendous all year. The Outreach Toolkit project was updated and is now available on www.tapspace.org. Moretti spoke about how important activity reports are for our Federal Advisory Committee Act (FACA) requirements. We are starting a TAP member checklist which is being worked currently to be added to the Outreach Toolkit eventually.

Public Comments

None

2020 Project Committee Report Out

Feedback for Improvement Opportunities:

- W&I Staff- What is the protocol as it relates to IRS staff being on calls? Is it for all meetings or only for specific meetings? It is important to know so committee members can better prepare to interact with them. There is no advance notice of IRS staff attending and we want members to engage in dialogue and feel free to express themselves. Give an example.
- Utilize the video portion of WebEx- It will help keep members engaged by visually seeing other members since there are no face to face meetings.
- Revisit the interview process and questions asked to potential TAP members. (Dive deeper into the details about the time commitment)
- Restructure orientation and allow more time for reviewing the TAP charter; TAP Bylaws; FACA; and Ethics & Records with examples to illustrate the point.

- Documents on www.TAPSpace.org should be periodically reviewed to ensure that the latest version of critical documents is available to TAP members.
- Current TAP members should have access to retired TAP member's outreach contacts and activities from the same state.
- Mentoring needs to be a concentrated focus when matching mentors with mentees. There should be follow-up to ascertain if the relationship is working and if not, reassign a mentee to a new mentor and vice versa.
 - Also, tied to the onboarding of new members is the need to provide more structure and seek recommendations to improve these processes.
 - Need to create a checklist or a template on the onboarding process.
- Is it possible for business cards to include a Quick Response code (QR) scan? This is done at professional association conferences.
- Remind TAP members of their roles, periodically, throughout the year during quarterly virtual meetings or some other method.
- Provide a list of previous referrals sent to the IRS for consideration for each Project Committee.
- In order to help members with providing timely Activity Reports we need to add more automation to this process.
- Suggestion- We identify the life cycles for each project committee to get a better understanding on how long it takes to send recommendations to the IRS for their consideration.
- Suggestion- We make improvements to our communication tools – currently WebEx has limitations and there may be better options. Also, consider these options for delivering virtual training and face-to-face meetings.
- We enjoy having guest speakers at meetings – suggest we invite more.
- Suggestion- Add an International Committee and/or add more international representatives to address international issues taxpayers are faced with.
- Suggestion- We have a targeted approach to IRS strategic plans to identify and/or improve taxpayer service.

Questions:

How are Subject Matter Experts (SME)s invited to committee meetings?

- Response- Members should make requests through their project committee analyst and DFO.

How do we address the imbalance of work? What does this process look like? Need to identify best practices because few do all the work. How can we improve attendance for all meetings? Identify best practices.

Outreach Strategy

Virtual Outreach Campaign

Facebook, Google, Microsoft, Zoom, Blogs and articles print media and media websites. Activity Reports total 600 hours with 340,000 audience.

Articles to highlight:

- Buttonow- "10 Things to Know About IRS Operations During the Coronavirus Epidemic" in *Accounting Today*.
- Price- Guess Column that included the Taxpayer First Act in *The Sojourner's Truth*.
- Groff- Numerous Post on Twitter and LinkedIn.

- Williams- Article in *National Association of Enrolled Agents*.

Newsletter

Important information for all TAP members available on www.tap.space.org. IRS Congressional Update newsletter to get our message out to Congress. Moretti wrote an article introducing TAP for this newsletter.

Member Successes and Best Practices

Toolkit updated; Virtual tax forums; www.tap.space.org and www.improveirs.org being merged and updated; New member checklist is pending. Will be online soon to be reviewed.

Moretti and Buttonow are working on a national media press release for new TAP members for which includes member name and email information for Associate Press; Reuters; and Bloomberg allowing people to contact us. Kleiber suggested moving the Day 1 Recap and Action items moved to the beginning of tomorrow's meeting.

Public Input/Closing

English thanked everyone for their efforts on the call and closed the meeting.

Next Joint Committee Meeting is August 26, 2020 at 1:30 p.m. ET

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Planning Meeting Minutes
August 26, 2020
Day 2**

Designated Federal Official (DFO)

- Terrie English TAP Director

Members Present

- Laurie Brock Chair, Internal Communications Committee (ICC)
- Tracy Bunner Chair, Notices and Correspondence
- Jim Buttonow Vice-Chair, Taxpayer Communications Committee
- Phillip “Phil” Kleiber National TAP Chair
- Robert “Bob” Moretti National TAP Vice-Chair
- Andrea Price Chair, Toll-Free Phone Lines Committee
- Stephen Selden Chair, Tax Forms and Publications Committee
- Nina Tross Chair, Taxpayer Assistant Centers Committee (TAC)
- Cheryl Williams Chair, Special Projects Committee
- Lindsey Funair Chair, Taxpayer Communications (Absent)

Visiting Members

- Hercules Analitis Member, Taxpayer Communications Committee
- Joseph “Joe” Edelen Member, Toll-Free Phone Lines Committee
- Patrick Kusiak Member, Tax Forms and Publications Committee
- T. Renee Parker Tax Forms and Publications Committee
- Thurston Smith Vice Chair, Taxpayer Assistant Centers Committee
- Sandy Villella Tax Forms and Publications Committee

Staff

- Lisa Billups Program Analyst
- Kevin Brown Management Assistant
- Conchata Holloway Program Analyst
- Cedric Jeans TAP East Chief
- Susan Jimerson TAP West Chief
- Antonia Keeling Program Analyst
- Gilbert Martinez Program Analyst
- Rosalind Matherne Program Analyst
- Matthew O’Sullivan Program Analyst
- Robert Rosalia Program Analyst
- Antoinette “Toni” Ross Program Analyst
- Fred Smith Program Analyst

Members of The Public

None

Welcome/Opening

English opened the call and noted a change in the agenda. Martinez will do a recap from yesterday's meeting after the Chair report.

Roll Call/Attendance

Quorum was met for the meeting.

Welcome/Announcements/Comments

Kleiber welcomed everyone to the call and thanked everyone for their participation.

Day 1 Recap

Martinez reviewed the discussion which included:

- Challenges
- Improvement Opportunities
- Activities and Accomplishments
- Working with your committee
- Mentoring
- Attendance
- Project Workflow Guidance
- Referral Concurrence Assessment

Price suggested that new members should automatically be given previous member outreach information. Price also indicated that committee members should have prior notice of any SME from W&I or any other area of the IRS before they join the meeting, so we are prepared. Martinez indicated that certain SMEs have standing invites to join our meetings so the staff will do a better job of defining these roles of these employees so that all members are aware of their roles in TAP duties. Williams suggested have SMEs who are better vetted to be able to answer specific questions the TAP committees will need. Martinez mentioned that having questions sent to the SMEs before our meetings might be a way to ensure that the SMEs are best prepared for our meetings.

Acknowledgement of Citizens

None

Chair and Vice Chair Responsibilities

- Working with your Committee
 1. Actively bring others into the discussion.
 2. Find out why members are disengaging or missing meetings and offer to provide them with the information they missed from the meeting.
 3. Ask members to give prior notice if they expect to miss a meeting.
 4. Consider a restarting meeting to allow the group to refocus.
 5. Switch out subcommittee leads to get more members engaged in participating roles.
 6. Use emails and phone calls for the subcommittee process.
 7. Don't let experienced members take over or hog the call.
 8. Don't go too fast on technical discussions.
- Mentoring
 1. Ad Hoc committee to train mentors.

2. Use the checklist that Moretti is preparing.
 3. Pair mentors and mentees up during the face to face meeting.
 4. Encourage returning members to be involved in the mentoring program to have more options to pair new member with similar time zones and interests.
 5. Make guidelines for mentors to follow with a phased timetable and a clearer understanding to that commitment.
 6. Develop a checklist as part of this more detailed process for mentoring.
- Attendance
 1. Ensure new members have a clear and detailed understanding to the time required to be a TAP member.
 2. Ensure that perspective members understand the TAP calendar, time commitment and average number of meetings members would normally attend.
 3. Consider replacing members faster if they cannot commit to the responsibility.
 4. These must be taken on a case by case circumstances.
 - Project Workflow Guidance

The possibility for a dropdown choice on www.improveirs.gov to allow the person entering the issue to choose the area the comment might flow to better the screening system.
 - Referral Concurrence Assessment

No consensus issues at this time.

Annual Report Template

Martinez thanked the members of Annual Report committee for their work. The committee is currently working on the table of contents with currently no change to the TAP mission or vision. There is an introduction to the TAP program since this report goes to the public, the NTA, the IRS Commissioner, to Secretary of Treasury and to Congress.

The committee is preparing to send the chair report templates to each committee chair. We will include referrals sent in 2019 and responded to in 2020. They are also preparing a report with all the referrals and sent to the IRS this year for committee chairs to use. The initial draft is due on October 16, 2020. We will review the reports for grammar, punctuation and consistency throughout. We will provide feedback as needed on these reports.

Martinez also mentioned this report goes all the way up to Congress, so we want to be sure the finished product is consistent and professional. The second draft will be due on November 13, 2020 with the final report due on December 11, 2020.

Martinez said they plan to review template for chair reports and sending it out for the Chairs to start their reports next month. Committee Analysts and DFOs will be available for assistance.

There will be a special events or activities section for activities not specific to a committee that should be shared. There will be a letter from incoming chair to be included. The chair report templates should be finalized by September 4, 2020 to be sent to chairs shortly thereafter.

2021 Project Proposal

Price Potential proposals:

100 million calls to toll-free line each year. The main complaints are that no questions answered; No call back option; www.irs.gov is not the only or best option.

1. The time it takes to speak to Customer Service Representatives (CSRs).
2. Involuntary disconnects; courtesy disconnects.
3. Callback technology.
4. Using technology to get to right person using proper functioning phone tree.

Steve Selden Potential Proposals:

None to report since much of the committee's work come from direct referrals from the IRS.

Tracy Bunner Potential Proposals:

1. Types of referrals the committee gets. Research on how to get issues specific to this committee.
2. Ways to make the committee efficient in a virtual environment.
3. Mentoring education and improvements.

Jim Buttonow Potential Proposals:

1. How does the IRS accelerate their six-year modernization efforts?
2. Getting access to this digitally via online accounts.
3. Meet taxpayers where they need to be met.

Cheryl Williams Potential Proposals:

1. Change subcommittee to something more appropriate with the times.
2. Standardize publication time frames.
3. A high school hackathon to test the IRS security.

Nina Tross Potential Proposals:

1. Not much work since TACs are closed.
2. Working a few holdover issues currently.

Laurie Brock Potential Proposals:

1. Make the most of the new website training when it becomes available.
2. Outreach with the Outreach committee
3. Working on social media
4. Newsletters

Chair Election Planning

Jimerson defined the election official's duties for the committee so members understand this job. This official oversees the entire election process for the next TAP National Chair and Vice-Chair. Members running for leadership positions are not eligible to be the election official.

- October 20, 2020 will be the session on being a TAP Chair or Vice-Chair.
- Nominations will be due by midnight October 26, 2020
- Campaign states due by midnight October 30, 2020

- Meet the candidate's session November 5, 2020
- Ballots sent to all member November 13, 2020
- Votes/completed ballots due by midnight November 13, 2020
- Results announced November 17, 2020

Patricia Anthony self-nominated. Martinez will work with Anthony for this responsibility.

TAP Member Survey Results

Jeans reported the purpose of this survey and how it helps improve TAP for the next year.

Overall satisfaction declined from 2018 to 2019. The government shutdown and late start to the TAP year may have played a big part with this.

Outreach training is an area of opportunity to be improved. Establishing relationship with LTA; Gathering sources from prior members; and Utilizing www.tapspace.org Outreach Toolkit. Go to military bases.

Do you find the scope and depth of the committee assignments efficient?

Better outreach; communications of newsletter; communicating active projects with other committees for input; working with IRS on new initiatives; and focus groups/studies.

Staff making the introduction to the community stakeholder liaison members including the TAP members might be a better way to establish a relationship for the members.

I understand the importance of the mentor/mentee role and responsibility?

More people to volunteer to be mentors; More training for mentors; pairing at face to face; having routine scheduled discussions; following with mentees; JC agenda discussion

Action Items

- Taking actions on the mentor suggestions to improve this program.
- Martinez to send wrap-up list out to include today for JC and maybe to all members.

Public Input/Closing

Kleiber thanked all and reminded the members of tomorrow's month JC meeting. English officially closed the call.

Next Joint Committee Meeting is August 27, 2020 at 1:30 p.m. ET



**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
July 23, 2020**

Designated Federal Official (DFO)

- Terrie English TAP Director

Members Present

- Laurie Brock Chair, Internal Communications Committee (ICC)
- Tracy Bunner Chair, Notices and Correspondence
- Lindsey Funair Chair, Taxpayer Communications Committee (Absent)
- Philip “Phil” Kleiber National TAP Chair
- Robert “Bob” Moretti National TAP Vice-Chair
- Andrea Price Chair, Toll-Free Phone Lines Committee
- Stephen Selden Chair, Tax Forms and Publications Committee
- Nina Tross Chair, Taxpayer Assistant Centers Committee (TAC)
- Cheryl Williams Chair, Special Projects Committee
- Jim Buttonow Vice-Chair, Taxpayer Communications Committee

Visiting Members

- Donna Burris Member, Toll-Free Phone Lines Committee

Staff

- Kevin Brown Management Assistant
- Conchata Holloway Program Analyst
- Cedric Jeans TAP East Chief
- Susan Jimerson TAP West Chief
- Antonia “Toni” Keeling Program Analyst
- Gilbert Martinez Program Analyst
- Rosalind Matherne Program Analyst
- Matthew O’Sullivan Program Analyst
- Robert Rosalia Program Analyst
- Antoinette “Toni” Ross Program Analyst
- Fred Smith Program Analyst
- Debra Awalt Program Analyst Wage and Investment (W&I)
- Tamikio Bohler Program Analyst W&I
- Michael Odom Program Analyst

Members of The Public

None

Welcome, Review Agenda

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

Roll Call

Quorum was met for the meeting.

DFO/National Office Update

English reported:

- Tax Forums being held now, going slow but well at this time.
- COVID-19 update- pay attention to donation scams and be careful who you donate to.
- August 13, 2020 is the date additional funds are going out to folks who did not get their entire stimulus payments.

TAP Managers Update

Jimerson reported:

- ICC Newsletter released.
- Toni Keeling's detail to TAP will conclude at the end of October, so someone else will have to complete the newsletter.
- Website design update going well.

Jeans reported:

- June Objective report released by National Taxpayer Advocate (NTA).
- Some of her objectives tie to our projects, be sure to reference this in your referrals
- Jeans will share this link with the committee today.

Approval of June 25, 2020 JC Meeting Minutes

Philip changed to "Phillip". Williams motioned; Bunner seconded.

Action: Minutes are approved as corrected.

TAP Chair Report

Kleiber spoke about reported 2019 issues were 427 and 2020 is 553. Most related to TACs being closed. Referral 2019 51 with 224 recommendations and 2020 has 22 referrals with 103 recommendations. Martinez will solicit participation for Annual Report committee support. Please let your committees know about this.

TAP Vice Chair Report

Moretti reminded everyone the activity reports and newsletter articles due on July 25, 2020. On the last Outreach committee meeting, the Outreach Toolkit review was completed. The final format will be posted very soon. A rundown of these changes will be sent out later. We expect less outreach from last year due to the pandemic.

Public Comments

None

Project Committee Review/Activities

Tax Forms and Publications

Referral Issues 41913- 2019 1040-SR - Standard Deduction Chart Needs

Correction. Recommendations made to improve clarity and taxpayer's experience.

Selden motion; Bunner Seconded.

Action: Issue elevated to IRS for consideration

41945-Mailing of Forms 1099 and 1096. Recommendations made to make form easier to understand and complete, improving the taxpayer's experience. Selden motioned; Buttonow seconded.

Action: Issue elevated to IRS for consideration

42267- IRS 1040 Instructions and Online Filing of Forms. Recommendations made to simplify completed this form and improve taxpayer's experience. Selden motioned; Bunner seconded.

Action: Issue elevated to IRS for consideration

42362- IRS Form 1040 Instructions, Pages 18 and 19. Recommendations made to clarify text and make the form easier to complete, thereby improving the taxpayer's experience. Selden motioned; Brock seconded.

Action: Issue elevated to IRS for consideration

43163- Self-Employment Tax - F1040 SCH SE. Recommendations made to make the form easier to complete for taxpayers. Selden motioned; Brock seconded.

Action: Issue elevated to IRS for consideration

Notices and Correspondence

Referral Issues 39806- CP 2000

Bunner reported Recommendations:

1. Emphasize this is not a bill in the beginning of the notice.
2. Clarify what the notice is about, being a proposed new balance.
3. Highlight what the taxpayer can do next to include proper address.
4. Give taxpayers options to include the setup fee options for installment agreements.
5. An option to alert the IRS that an installment payment agreement was setup online or the intent to pay in full within 120 days was added to the referral.

Jim Buttonow asked if the committee will address these two issues as they go forward:

1. For the CP 2000 will you address the penalty issue? CP 2000 also makes a proposal of penalty that taxpayers need to fully understand and
2. The CP2000 works like an audit in terms of deficiency, taxpayers need to be made aware of their Right to Appeal

Selden motioned; Buttonow seconded.

Action: Issue elevated, as amended, to IRS for consideration.

Special Projects

Williams reported still working issues 41565 and 41566. IRS declined due to budget issues. Issues 42213 and 42219 have been combined. Issue 41525 was tabled to later this year. Williams was published again, and the article may be in next newsletter.

Selden will share a report from the Congressional Budget Office which states that funding the IRS an additional 40 billion will bring in an additional 103 billion in revenue. This can be a good response when funding issues are raised by the IRS

Toll-Free Phone Lines

Price reported issue 40558 PSA requested toll free phone lines rejected, reconsidered and rejected a second time.

Issue 41423 tax practitioner phone line allowing support staff to give correct answers. The Taxpayer First office thinks this is important.

42231 Taxpayer should be able to leave callback information. IRS feels it's important.
43094 Redrafting 1040-line prompt structure, this is an Most Serious Problem of the NTA.

Taxpayer Communications

Buttonow thanked everyone for promoting Free File program. There was a 28 percent increase from last year. We should follow-up on this issue next year. They are working on how to get more referrals to www.improveirs.org with IRS.

The IRS is rectifying many of the issues they are giving us in real time by adopting our recommendations. They are working "Where's My Refund" for prior years. We are working on tax lien payoff access in real time for tax lawyers to stream-line this process. They are currently working on two issues:

Online accounts for taxpayers/professionals
Inability to get ahold of IRS

Accelerated online accounts would be in line with a taxpayer focused approach for the IRS and will be our focus moving forward.

Taxpayer Assistance Center Improvements

Tross reported looking at innocent spouse versus injured spouse and how people access finding a TAC office. Kleiber said the Treasury Secretary stated there will be another stimulus package, so we should be anticipating there being additional issues soon.

Internal Communications Committee

Brock speaking on Annual Report and social media will be the focus of next meeting. Brock also indicated that the newsletter articles can be any kind that members feel is appropriate.

Round Table

Selden corrected some things he said during the Taxpayer First Act call regarding TAP working with them. They have a 10-year focus with their mandates. Buttonow discussed their comprehensive customer service strategy. Buttonow is also interested in what their focus will be on cybersecurity and enforcement. Because this is such high-level, our comments should be as a committee instead of as individuals for a larger impact.

Moretti pointed out they view international tax problems as an underserved area. This are being considered immediately. Price pointed out that wait time transparency was important, along with expanding the automatic callbacks. Martinez invites members to review the template on Annual Report Chair reports and make changes they think are needed. Martinez cited the newsletter reports as a source that can be used for the committee annual reports.

Closing

English thanked everyone for their efforts on the call and closed the meeting. Thanked all members who attended the Taxpayer First Act meeting also.



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



**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
June 25, 2020**

Designated Federal Official (DFO)

- Terrie English TAP Director

Members Present

- Laurie Brock Chair, Internal Communications Committee (ICC)
- Tracy Bunner Chair, Notices and Correspondence
- Lindsey Funair Chair, Taxpayer Communications Committee
- Phillip “Phil” Kleiber National TAP Chair
- Robert “Bob” Moretti National TAP Vice-Chair
- Andrea Price Chair, Toll-Free Phone Lines Committee
- Stephen Selden Chair, Tax Forms and Publications Committee
- Cheryl Williams Chair, Special Projects Committee

Members Absent

- Nina Tross Chair, Taxpayer Assistant Centers Committee (TAC)

Visiting Members

- Donna Burris Member, Toll Free Phone Lines Committee
- Martha Lewis Member, Tax Forms and Publications Committee
- Michael Avery Member, Special Projects Committee

Staff

- Lisa Billups Program Analyst
- Kevin Brown Management Assistant
- Conchata Holloway Program Analyst
- Cedric Jeans TAP East Chief
- Susan Jimerson TAP West Chief
- Antonia Keeling Program Analyst
- Gilbert Martinez Program Analyst
- Rosalind Matherne Program Analyst
- Matthew O’Sullivan Program Analyst
- Robert Rosalia Program Analyst
- Antoinette “Toni” Ross Program Analyst
- Fred Smith Program Analyst
- Sheila Andrews Deputy Executive Director, Communications, Stakeholder Liaison and Online Services (CSO)
- Debra Awalt Program Analyst Wage and Investment (W&I)
- Tamikio Bohler Program Analyst W&I
- Cynthia “Cindy” Jones Manager W&I
- Michael Odom Program Analyst
- Alton Berger Supervisor, Public Affairs W&I
- Sheila Balkaran Program Analyst W&I

Members of The Public

None

Welcome, Review Agenda

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

Roll Call

Quorum was met for the meeting.

DFO/National Office Update

English reported:

- Taxpayer First act wants TAP chair and vice chairs for a survey.
- Tax forums will be done virtually this year, more information will be relayed later.

TAP Managers Update

Jimerson reminded the committee articles for the newsletter articles due today. Jimerson thanked Antonia Keeling for assisting with this project.

Approval of May 28, 2020 JC Meeting Minutes

1. Committee name corrected to Toll Free phone lines-title.
2. "...who may not be" removed from first sentence of Taxpayer Communications report.
3. Next meeting date corrected to June 25, 2020.

Price motioned; Williams seconded.

Action: Minutes are approved as corrected.

TAP Chair Report

Kleiber reported things picking up and momentum is being made with each of the committees getting much better than they were at the start of the TAP year. Kleiber encouraged members to complete survey and ask your committee to complete it. The National Taxpayer Advocate (NTA), Erin Collins, shared lots of information during the All TAP virtual meeting. Jim Buttonow gave a simple way to put the word out about Free Filing during the ICC meeting.

TAP Vice Chair Report

Moretti reported the activity reports are due today. There was an update received on website review project and the ICC members are helping with this project. There are Interviews in process for the 2021 year. All 23 files in the Outreach Toolkit have been reviewed and Media Contact guide is the most important. This has not been updated since 2008. Howard Brooks, our media contact source is helping with this process.

Public Comments

None

Project Committee Review/Activities

Tax Forms and Publications

41750 2210-F To assist farmers with reporting the correct amounts of under payments and penalties in terms of estimated taxes. This would give farmers and fisherman new option to file the form without waiver or change filing status on this form. Selden motioned; Funair seconded

Action: Issue elevated to IRS for consideration

41996 Printable IRS Forms 1099 and 1096. This referral wants to make form scannable and fillable. There should be language stipulating that although Forms W-2, W-3 go to the Social Security Administration the referral still would like all these forms to be made printable. Martinez made the wording update. The name of this referral was also changed to Printable Reporting Forms. Selden motioned, Funair seconded.

Action: referral approved as amended to elevate to the IRS for consideration

42823 1099-R Review

The referral would require the reporting entity to report qualified charitable distribution on the form. The referral also requests a fillable for of Copy A, consolidating a list of codes to one page and increasing the font size on the form. Selden motioned; Price seconded.

Action: Issue elevated to IRS for consideration

42824 Pub. 15-T - Federal Income Tax Withholding Methods

The referral proposes to streamline language, clarify the requirements for withholding, define the exemption, eliminate the need for annual changes to this form, to clarify the use for nonresident alien. Selden motioned; Brock seconded.

Action: Issue elevated to IRS for consideration

42825 Review of 2019 Form 1040 Schedule 1 and Instructions

42826 Review of 2019 Form 1040 Schedule 2 and Instructions

42827 Review of 2019 Form 1040 Schedule 3 and Instructions

These three referrals are all asking to increase font size to improve readability; be reformatted to create consistent format, include specialty items to be able to be cross-referenced.

Selden motioned; Williams seconded.

Action: All three Referrals elevated to IRS for consideration for consideration.

Selden reported the committee responded to the IRS in draft form for one matter that will be discussed soon.

Notices and Correspondence

Referral Issues 42225, 42226, 42413, 42425

Bunner reported submitting drafts to the IRS for these referrals due to time constraints. The referrals were directly related to formatting, clarification and understanding.

42413- LT 17

The referral is to provide clarification and comments regarding Employer Identification Number (EIN) and SSNs. The EIN should be separate, and the Taxpayer Identification number (TIN)/SSN should be together on the form.

42225- CP14

42226- Collection Letter LT16

42425- LT 19

These referrals were for formatting, clarification and understanding and are being voting on as a group. Selden motioned; Brock seconded.

Action: All referrals elevated to IRS for consideration.

Bunner reported that the CP 2000 may be ready for next meeting.

Internal Communications Committee

Brock reminded the committee the article for the newsletter can be as much as three-quarters of a page or 2500 characters, which is not very long. Brock also spoke about the ICC promoting Free File through social media outlets.

Referral Issue 43192- TAPSpace/Improveirs.org Website Re-Design

This referral is making the website more user-friendly and accessible to the public to include taxpayers with disabilities. This project is important as it address one of the Taxpayer Bill of Rights (TBOR), Right to Quality Service. Brock motioned; Price seconded

Action: Referral elevated to CSO for consideration.

Special Projects

41296- Quick Withdrawal of POA's. Electronic version of withdrawal of Power of Attorney (POA) to make this process faster and easier. Williams motioned; Funair seconded.

Action: Referral elevated to IRS for consideration.

Williams reported COVID-19 has brought several complaints and issues. Four of them are from the International subcommittee and seven for the ID Theft subcommittee.

Toll-Free Phone Lines

Price reported two members resigned. Price also welcomed Donna Burris as the newest committee member who jumped right in to contribute. One subcommittee is working on the IRS Prisoner Reentry Program to help taxpayers returning to society along with an issue with www.irs.gov and an issue allowing service representative to answer complex tax questions.

Subcommittee two is working on several issue about 1040 phone lines and we hope to bring issues up soon. The committee referred on issue to the to the Special Projects committee concerning international phone lines.

Taxpayer Communications

Funair applauded Jim Buttonow for sharing how to share Free File information via social media like LinkedIn and Facebook. Funair suggested reminding taxpayers that they should file their taxes by July 15, 2020.

Taxpayer Assistance Center Improvements

O'Sullivan reported a lot of issues concerning stimulus checks and COVID-19. There have been quite a few issues and possible cases regarding innocent spouse and transcript issues. Often the secondary person on the tax return is calling for innocent spouse or transcript requests. This issue is being reviewed to make is easier for taxpayers to deal with these issues. Both issues are in the process of being worked.

Round Table

Survey ends tonight please take, Jeans. Kleiber wants input from panel members regarding the next All TAP meeting.

Closing

English thanked everyone for their efforts on the call and closed the meeting.



Next Joint Committee Meeting is July 23, 2020 at 1:30 p.m. ET

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

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
May 28, 2020**

Designated Federal Official (DFO)

- Terrie English TAP Director

Members Present

- Laurie Brock Chair, Internal Communications Committee (ICC)
- Lindsey Funair Chair, Taxpayer Communications Committee
- Philip “Phil” Kleiber National TAP Chair
- Robert “Bob” Moretti National TAP Vice-Chair
- Andrea Price Chair, Toll-Free Phone Lines Committee
- Stephen Selden Chair, Tax Forms and Publications Committee
- Nina Tross Chair, Taxpayer Assistant Centers Committee (TAC)
- Cheryl Williams Chair, Special Projects Committee
- Felecia Dixson Vice-Chair, Notices and Correspondence

Members Absent

- Tracy Bunner Chair, Notices and Correspondence

Visiting Members

- Patrick Kusiak Member, Tax Forms and Publications

Staff

- Lisa Billups Program Analyst
- Kevin Brown Management Assistant
- Cedric Jeans TAP East Chief
- Susan Jimerson TAP West Chief
- Antonia Keeling Program Analyst
- Gilbert Martinez Program Analyst
- Rosalind Matherne Program Analyst
- Matthew O’Sullivan Program Analyst
- Robert Rosalia Program Analyst
- Antoinette “Toni” Ross Program Analyst
- Fred Smith Program Analyst
- Sheila Andrews Deputy Executive Director, Communications, Stakeholder Liaison and Online Services (CSO)
- Debra Awalt Program Analyst Wage and Investment (W&I)
- Tamikio Bohler Program Analyst W&I
- Cynthia “Cindy” Jones Manager W&I
- Alton Berger Supervisor, Public Affairs W&I
- Kathy Searcy Program Analyst W&I

Members of The Public

N/A



Welcome, Review Agenda

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

Roll Call

Quorum was met for the meeting.

DFO/National Office Update

English informed the committee that the IRS sent out cards to taxpayers who were not able to receive their stimulus payments electronically. This is not a scam and the information about this can be found on www.irs.gov. There is also a legislative affairs mailbox on www.irs.gov for questions about the Earned Income Tax Credit (EITC) inquiries, but this is only for congressional inquiries and not the public.

English reported that the IRS has started reopening some offices, with limited staff, while states begin to reopen. The tax forums will be virtual this year, Fred Smith is the coordinator for these events. The issue with www.tapspace.org should be resolved at this time. English also reported that the business cards are on standby until the offices in Washington D.C. reopen.

TAP Managers Update

Jimerson thanked Antonia Keeling and all others for helping with the May newsletter and asked for reports for the June newsletter. Jimerson attended a virtual outreach event with the Washington State Local Taxpayer Advocate (LTA).

Jeans reported Jordan Bayless from Indiana resigned. We are developing the redesign of www.tapspace.org and progress is being made. The hope is to be done by September or October of this year.

Approval of April 23, 2020 JC Meeting Minutes

Williams motioned, Tross seconded.

Action: Minutes are approved as submitted.

TAP Chair Report

2019 annual report is available on www.tapspace.org. Kleiber encouraged chairs to have member review the reports. Kleiber indicated the annual report could help with knowing what the current committees worked on last year and may help with referrals being done this year. Kleiber reported that drafts are issues initiated by the IRS and have a shorter time frame for completion which is why they do not go through our normal referral process. English added that the final referral goes through the JC approval process.

Kleiber inquired about the recommendation approval process and English indicated that the version the JC uses will include a motion and second for all referrals.

TAP Vice Chair Report

Moretti said we will need to be more creative with outreach during the pandemic. Blogs, newspapers, magazines, journals, publications and periodicals will have to be used for outreach. Please encourage your members to use these in both electronic and written formats for outreach. This information will be in the next newsletter as a reminder. Moretti reminded the members to use the proper format when submitting reports: include year, committee and purpose or title.

Moretti reported the outreach committee is still updating the files in the outreach toolkit with eight out of twenty-three at this time. We are using a quote from the new National Taxpayer Advocate in these updates.

Public Comments

None

Project Committee Review/Activities

Tax Forms and Publications

Referral Issue 42292 TY 2018 F1040 Instructions Review- Kusiak recommendations made in respect to the CARES act. Selden motioned; Dixon seconded.

Action: Referral elevated to IRS for consideration

Notices and Correspondence

Dixon reported there were four draft referrals that will be finalized after the JC approved them. Drafts had already been submitted to the IRS due to the short time frame. Dixon reported that the committee has at least one more referral that should be ready for the JC in the near future.

Toll-Free Phone Lines

Price reported issue 40558 PSA is being reconsidered by the IRS. Price reported there are five issues related to international taxpayer concerns being worked at this time. There will be a Subject Matter Expert (SME) along with member Laura Snyder at their next meeting. Price reported the committee is considering issues related to calls being disconnected and for extremely long wait times, but no decision has been made at this time.

Special Projects

Williams reported they have three issues awaiting SMEs to be on their calls very soon to provide more information. These issues are still being considered. Issue 36969 has been accepted and will be implemented on 1040 instructions by December 31, 2020.

Taxpayer Communications

Funair reported that the committee is doing outreach to bring attention to the free file program since there may be as many as 25 million taxpayers eligible to use this program.

The committee would also like to promote the free online lookup tool and providers who will complete state tax returns for free. Excellent conversation starter for outreach. Funair reported that Jim Buttonow wrote an article in Accounting Today and encouraged the member to please read and share.

Taxpayer Assistance Center Improvements

Tross reporting the committee is working on a few issues but none which are ready to present at this time.

Internal Communications Committee

Brock spoke about the TAP Newsletter, Facebook and www.tapspace.org. Brock wanted to ensure articles are received on time so the newsletter can get out timely. Brock encouraged members to join the TAP Facebook page. The committee is working on some issues in www.tapspace.org and making Facebook more acceptable and easily used.

Round Table

None

Closing

English thanked everyone for their efforts on the call and closed the meeting. The Virtual All-TAP meeting will be held on June 18, 2020, with a training session and the National Taxpayer Advocate, Erin Collins, along with Maryclaire Ramsey will join the meeting.

Next Joint Committee Meeting is June 25, 2020 at 1:30 p.m. ET

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
April 23, 2020**

Designated Federal Official (DFO)

- Terrie English TAP Director

Members Present

- Tracy Bunner Chair, Notices and Correspondence
- Lindsey Funair Chair, Taxpayer Communications Committee
- Philip “Phil” Kleiber National TAP Chair
- Robert “Bob” Moretti National TAP Vice-Chair
- Andrea Price Chair, Toll-Free Phone Lines Committee
- Stephen Selden Chair, Tax Forms and Publications Committee
- Nina Tross Chair, Taxpayer Assistant Centers Committee
- Cheryl Williams Chair, Special Projects Committee
- TBD Chair, Internal Communications Committee (ICC)

Visiting Members

- Jim Buttonow Vice Chair, Taxpayer Communications Committee
- Terrel Flake Member, Toll-Free Phone Lines Committee
- Tom Kerr Member, Toll-Free Phone Lines Committee
- Thurston Smith Vice Chair, Taxpayer Assistant Centers Committee
- Charles Jones Member, Notices and Correspondence

Staff

- Lisa Billups Program Analyst
- Kevin Brown Management Assistant
- Cedric Jeans TAP East Chief
- Susan Jimerson TAP West Chief
- Gilbert Martinez Program Analyst
- Rosalind Matherne Program Analyst
- Matthew O’Sullivan Program Analyst
- Robert Rosalia Program Analyst
- Antoinette “Toni” Ross Program Analyst
- Fred Smith Program Analyst
- Debra Awalt Program Analyst Wage and Investment (W&I)
- Tamikio Bohler Program Analyst W&I
- Cynthia “Cindy” Jones Manager W&I

Members of The Public

- Dominic Concilio
- Vanriel Stafford

Welcome, Review Agenda

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

Roll Call

Quorum was met for the meeting.

DFO/National Office Update

English reiterated the IRS Commissioner's webinar, which was postponed until further notice. English spoke of information constantly changing regarding the COVID-19 crisis and the staff providing the most up to date information to the committee that we can. For now, www.irs.gov/coronavirus is the website that Internal Revenue updates daily regarding this ongoing crisis.

TAP Managers Update

Jimerson reminded the committee that an email was sent soliciting volunteers for a Volunteer Income Tax Assistance (VITA) product review project. Please respond by close of business tomorrow to Matthew O'Sullivan. The first ICC will be held April 28, 2020, at 3p.m. ET. Please join the call or send an email to O'Sullivan or Jimerson if you would like to join the committee.

Jeans reported the survey about the virtual TAP introductory meetings are being sent out and this process will be open until May 2, 2020. Please urge your committees to complete this survey.

Set Dates & Times for 2020 JC Meetings

Fourth Thursday of the month at 1:30 p.m. ET. The November meeting will occur on November 19, 2019, due to the Thanksgiving holiday.

Approval of November 21, 2019 JC Meeting Minutes

Williams motioned; Price seconded. Minutes accepted as submitted.

Action: Minutes are approved as submitted.

TAP Chair Report

Kleiber reviewed how referrals will move through the joint committee:

1. The project committee Chair presents the referral
2. The voting members will make a motion.
3. The motion will be seconded.
4. There will be discussion, if necessary.
5. Then the committee will vote on the referral

Kleiber explained that all TAP members may join the JC call, but there are only nine voting members: the six project committee Chairs, the ICC Chair, the National Chair and Vice-Chair. Additionally, all visiting members must wait to be called upon before speaking during the meeting. Kleiber also indicated that both the Chair and Vice-Chair will be attending other committee meetings throughout the year, giving the Chair notice beforehand. These will be observation only unless the committee chooses to call upon them to speak.

Kleiber reiterated the JC role is:

- To review and approve project committee recommendations.
- Approved recommended policy and procedural changes.
- Coordinate the project committee activities.

- Represent the consensus view of TAP in public statements.
- Communicate decisions to the TAP members.
- Prepare the Annual Report.

TAP Vice Chair Report

Moretti thanked especially first year members chairing their committees

Moretti announced Outreach committee meeting will meet on the third Thursday at noon ET each month. The committee is reviewing the outreach toolkit folder to ensure it is up to date. They will focus on ensuring the National Taxpayer Advocate (NTA) is up to date and not referring to the former NTA.

Moretti asked the Chairs to please speak about outreach and any issues to the outreach report form which is being addressed at this time. Once the ICC is up and running, they will be asking each committee for a report for the TAP monthly newsletter. Kleiber shared, that for last year, he delegated that duty to each committee member to allow for shared responsibility throughout the committee. Moretti reported that business cards have been ordered. English added that this process has been tabled while the stay at home order is in place.

Public Comments

None

Project Committee Review/Activities

Tax Forms and Publications

Selden presented issue 42395 Third Party Designee Sections and the Paid Preparer Use Only. Selden motioned; Williams seconded.

Action: Issue elevated to IRS for consideration

Issue 42292- For future reference, this type of document should be marked as a draft, so the committee understands what the committee has done with this project per Kleiber.

Taxpayer Communications

Buttonow presented issue 40224- Provide TAP Link on www.IRS.gov Website. Funair motioned; Williams seconded. There was a discussion about this link going to the top line of the site, but that will not be requested.

Action: Issue elevated to IRS for consideration

42334- Taxpayer Communication and Online Tool to Address CARES Act Stimulus Payments. Buttonow indicated the purpose of this referral is to get one message, via a distributable video, that is the official IRS position to go to all local news organizations as a clear IRS communication. Bohler shared that there are a number of YouTube videos on this topic already existing. Jones shared that the site www.Usa.gov/coronavirus has what all the federal government is doing related to COVID-19 situation. Awalt suggested looking at news releases. Funair motioned; Tross seconded.

Action: Issue elevated to IRS for consideration

Taxpayer Assistance Center Improvements

Tross presented issue 40782- Improvement to Taxpayer Assistance Center (TAC) webpage with addition of Google Maps. There are many improvements needed to help taxpayers who rely on these mapping tools to get them to the IRS offices. Tross motioned; Price seconded.

Action: Issue elevated to IRS for consideration

Notices and Correspondence

Tracy Bunner is working on four different projects with two projects may be ready for the next JC meeting. The other three are in various stages of preparation.

42413- being worked
42425- being worked
42225- almost done

Special Projects

Cheryl Williams reported the following issues being worked:

41749 Difficulty in filing taxes outside of the USA- being worked
41535 Practitioners revealing Social Security Numbers- being worked
41296 Quick withdrawal of Power of Attorney- being worked

Toll-Free Lines

Andrea Price is working three issues carried forward from last year:

40558 Instituting a Public Service Announcement directing taxpayers to www.improveirs.org- The committee is drafting a rebuttal to this rejection.
40707 International taxpayers' concerns- The committee is considering next steps since it was rejected.
40124 Addressing complaints being disconnected from calls on the IRS toll-free phone lines. This was rejected and the committee is considering next steps.

Internal Communications Committee

O'Sullivan reported that the first meeting is set for Tuesday, April 28, 2020.

Round Table

Kleiber and Moretti thanked the committee for all their efforts and reminded the committee to put referrals forward they think will help or improve the taxpayer experience and allow the IRS to accept or reject them.

Tross requested getting the NTA on the JC call, English reported that she will make that request but it will not be easy to get on the NTA's calendar. English also explained that it is protocol for TAP to request a slot on the NTA's calendar, which is we have made for this year. English reported that our initial request was for the face to face meeting before it was canceled.

Closing

English thanked everyone for their efforts on the call and closed the meeting.

Next Joint Committee Meeting is May 28, 2020 at 1:30 p.m. ET