



## 2014 Meeting Minutes Taxpayer Assistance Center (TAC) Project Committee

- November 13, 2014
  - October 9, 2014
  - September 11, 2014
  - August 14, 2014
  - July 10, 2014
  - June 12, 2014
  - May 7, 2014
  - April 10, 2014
  - March 19 – 21, 2014
  - February 13, 2014
  - January 16, 2014
- 

## Taxpayer Assistance Center (TAC) Project Committee Taxpayer Advocacy Panel (TAP) Meeting Minutes November 13, 2014

### IRS Staff

- Cedric Jeans – Designated Federal Officer
- Robin Owsley – Program Analyst, TAP
- Kevin Brown – Management Assistant, TAP
- Tamikio Bohler – Program Analyst, Wage and Investments (W&I)
- David Desalatte (Absent) – Program Analyst, SA
- Bob Fett (Absent) – Local Taxpayer Advocate, Vermont
- Cindy Jones (Absent) – Supervisor, W&I
- Donna Powers (Absent) – Program Analyst, TAP
- Beth Braddock – Management & Program Analyst, W&I
- Bill Mezger – Portfolio Manager, TAS
- Beth Scott (Absent) – Program Analyst, W&I
- Kim Vinci – Program Analyst, TAP
- Marisa Knispel – Management and Program Analyst, SA

### TAP Members

- Juan Aguirre (Absent) – Cuyahoga, OH
- Ralph Boyea – Keaau, HI
- Nancy Dery – Sanbornville, NH
- Jamelda Fulton – Greenville, MS
- Daniela Goia – Garden Grove, CA
- Allan Goldberg – Hunter, NY
- Robert Gross – Montpelier, VT

- Catherine Jeppson – Los Angeles, CA
- Samuel Kindred – Westerville, OH
- Page Moore – Omaha, NE
- Robert Phillips – Dallas, TX
- Alphonse Piard – Miami, FL
- Edward Sykes – Rose Hill, KS
- David Thies – Alton, IL
- Hyacinth Tucker (Absent) – Bowie, MD

### **Welcome/Announcements**

Cedric Jeans welcomed everyone and declared the meeting opened.

### **Roll Call & Approval of Minutes**

Quorum was met for this meeting. The minutes for September and October meetings were approved for posting with no changes.

### **Designated Federal Officer/National Office Report**

Jeans reported that the new member selection package is at the Department of Treasury for approval and we hope to have it back as soon as possible. Sheila Andrews reported that the training is still being prepared for the January meetings with possible locations being: Atlanta, Jacksonville and Albuquerque, New Mexico. Once the package has been approved we can then start to finalize all of the plans for the meetings. Andrews recognized Ed Sykes and Robert Gross for their dedication and service for the last three years and let them know it has been greatly appreciated.

### **Chair Comments**

Ed Sykes thanked everyone for such a large turnout for this meeting and indicated that we have a busy schedule and will need to be sure we are able to cover all of our agenda.

### **Subcommittee Report Out**

**Issue# 27968 – *Interns/Volunteers*** – Catherine Jeppson reported that per the Joint Committee (JC) recommendations, some of the project statement and goal statement has been condensed with much of the information being moved to the background and research analysis sections of the referral. Jeppson stated that this, along with some grammatical corrections, makes the referral look a lot better.

There was an issue with the name of a member who had not contributed to the committee but was included in the credits. A request was made to remove this member Hyacinth Tucker.

**Consensus: The former member's name will be removed from the referral.**

**Issue# 28183** – Ralph Boyea reported that the JC approved the referral with some minor grammar and formatting corrections. Alphonse Piard made these changes and

got the referral back to the JC as requested. Boyea thanked the entire subcommittee for all of their work and dedication on this project and its success.

**Issue# 29722** – Form 2290, *Heavy Highway Vehicle Use*

Allan Goldberg reported that there was considerable discussion relative to the work the subcommittee did on the Volunteer Income Tax Assistance (VITA) since that work has not been completed. What was said is that the VITA subcommittee, which will be a follow on next year, will be considering additional recommendations. One of the recommendations will be to have a more robust VITA program. Goldberg referenced a recent Treasury Inspector General for Tax Administration (TIGTA) report chiding the IRS to increase Business E-Filing program, which has been lagging behind the Individual E-Filing program. Goldberg continued with how our suggestions mirrored many of the TIGTAs recommendations to the IRS for improved service.

**Issue# 30084** – *Vita Issues*

Alphonse Piard reports that we came up with a total of 10 recommendations for this issue. The first step was requesting feedback from W&I and this resulted in us making some adjustments to the referral. We then requested additional feedback and at least two of the proposals received a favorable response by the IRS, while the other eight were not being received for various reasons. The reason for the response was because they would require a lot of work in terms of needs assessment of the taxpayers that we cannot perform in our current position. Piard suggested that this referral be pushed back for next year's committee since we had so much push back from the informal reviews by the IRS. Piard believes that the referral should be refined to improve the direction and the purpose of the referral to make sure it can serve the purpose of improving VITA programs for the taxpayers.

There was an extended discussion over the details of the VITA program and whether this program is still available for assisting those taxpayers who really need assistance and are no longer able to get help from the Taxpayer Assistance Centers (TACs). Cindy Jones stated that the deadline for grant requests for the 2016 was quickly approaching. Jones stated that December to February of 2015 is the cutoff for fund requests for the 2016 year. The Link and Learn is part of the recommendations and this is something that needs to be done as quickly as possible to get the TAP's perspective seen and heard by the committee. A handshake meet and greet will be set up with the owners of the VITA program.

Based on the timing and legal requirements, the soonest we could set up this meeting would be for January 2015. The committee remains divided on the issue, but the issue is not able to move forward at this time. Tamikio Bohler suggested that we sit down with the VITA team and try to find a consensus to addressing this issue for next year. The details of these plans will be worked out for next year.

**Public Participation**

None.



### **Closing**

Sykes closed the meeting and thanked everyone for attending the call. Robert Gross mentioned that he has appreciated being a part of TAP and noted that the idea of helping taxpayers was a good one and he hopes that the IRS feels the same at some point in time.

**The next TAC meeting will be in January of 2015, there has not been an official time frame set for this meeting.**

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



**Taxpayer Assistance Center Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
October 9, 2014**

**IRS Staff**

- Rose A. Babb – Management Assistant, TAP
- Tamikio Bohler (Absent) – Program Analyst, W&I
- Bob Fett – Local Taxpayer Advocate, Vermont
- Cindy Jones (Absent) – Supervisor, W&I
- Knispel, Marisa – Program Analyst
- Donna Powers – Program Analyst, TAP
- Louis Morizio – Designated Federal Officer
- Beth Braddock (Absent) – Management & Program Analyst, W&I
- Bill Mezger (Absent) – Portfolio Manager, TAS
- Beth Scott (Absent) – Program Analyst, W&I

**TAP Members**

- Juan Aguirre (Absent) – Cuyahoga, OH
- Ralph Boyea – Keaau, HI
- Nancy Dery – Sanbornville, NH
- Jamelda Fulton – Greenville, MS
- Allan Goldberg – Hunter, NY
- Robert Gross – Montpelier, VT
- Catherine Jeppson (Absent) – Los Angeles, CA
- Samuel Kindred – Westerville, OH
- Page Moore – Omaha, NE
- Robert Phillips (Absent) – Dallas, TX
- Alphonse Piard – Miami, FL
- Edward Sykes – Rose Hill, KS
- David Theis (Absent) – Alton, IL
- Hyacinth Tucker (Absent) – Bowie, MD

**Welcome/Announcements**

Powers was the Designated Federal Official; she welcomed everyone. Morizio joined the call subsequently.

**Roll Call & Approval of Minutes**

Quorum was met for this meeting. The minutes for September were approved for posting as received.



## **Chair Comments**

Sykes welcomed everyone and stated that he appreciates the work done in the subcommittees.

## **Subcommittee Report Out**

**Issue# 27968** – (*Interns/Volunteers*) – Kindred reported for Jeppson, he discussed some of the goals from the draft proposal:

1. The IRS Careers website should create new internships homepage that is easy to access and use. Emphasis should be placed on the features of an IRS career rather than overly focus on the benefits alone.
2. There should be two groups of interns; one group should be all year round with summer internships for undergraduate and graduate college students. The second group should be a seasonal internships available for the tax –filing season at the Taxpayer Assistance Centers.
3. The IRS should assign an intern programs manager to oversee and coordinate interns and intern issues across the Internal Revenue Service.
4. Another viable opportunity to explore is entering into a partnership with the Registered Apprenticeship program under the Department of Labor.

The full committee has agreed with the proposed referral. Powers will now send it forward to the Joint Committee (JC) for their approval.

**Issue# 28183** – (*Cash Payments*), Boyea reported on his subcommittee proposal. The subcommittee agreed that Powers can send the referral forward to the JC for their approval.

**Issue# 29722** – (*Form 2290, Heavy Highway Vehicle Use*), Goldberg stated that his recommendations have been sent to the Attorney Advisors Group (AAG). The committee approved the draft sent to the Attorney Advisors Groups. Except for grammar changes, when it returns from the AA Powers can sent it forward to the JC for their approval.

**Issue# 30084** – (*Vita Issues*), Piard stated that the vote is pending on this referral because his subcommittee is waiting for more feedback from SPEC. This feedback should be received by October 15, 2014. Piard has received some recommendations from Goldberg and is working on it. Piard suggested that the subcommittee strongly consider reworking this issue in 2015.

## **Public Participation**

None.



**Closing**

Sykes closed the meeting and thanked everyone for attending the call.

**The next TAC meeting will be on Thursday, November 13, 2014, at 2 p.m. Eastern Standard Time.**

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



**Taxpayer Assistance Center (TAC) Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
September 11, 2014**

**IRS Staff**

- Rose A. Babb – Management Assistant, TAP
- Tamikio Bohler – Program Analyst, W&I
- Bob Fett (Absent) – Local Taxpayer Advocate, Vermont
- Cindy Jones (Absent) – Supervisor, W&I
- Knispel, Marisa – Program Analyst
- Donna Powers – Program Analyst, TAP
- Louis Morizio – Designated Federal Officer
- Beth Braddock – Management & Program Analyst, W&I
- Bill Mezger – Portfolio Manager, TAS
- Beth Scott – Program Analyst, W&I

**TAP Members**

- Juan Aguirre (Absent) – Cuyahoga, OH
- Ralph Boyea – Keaau, HI
- Nancy Dery – Sanbornville, NH
- Jamelda Fulton – Greenville, MS
- Daniela Goia (Absent) – Garden Grove, CA
- Allan Goldberg – Hunter, NY
- Robert Gross – Montpelier, VT
- Catherine Jeppson – Los Angeles, CA
- Samuel Kindred – Westerville, OH
- Page Moore – Omaha, NE
- Robert Phillips – Dallas, TX
- Alphonse Piard – Miami, FL
- Edward Sykes – Rose Hill, KS
- David Thies – Alton, IL
- Hyacinth Tucker (Absent) – Bowie, MD

**Welcome/Announcements**

Morizio welcomed everyone and declared the meeting opened.

**Roll Call & Approval of Minutes**

Quorum was met for this meeting. The minutes for August were approved for posting.



### **Designated Federal Officer**

Morizio welcomed everyone; he stated that things are moving along with the development of the virtual training preparation for the new and returning members of Taxpayer Advocacy Panel. Taxpayer Advocacy Panel is also working on training for the chair and vice chair positions namely what those positions entail if members chose to run for either position in their committees. Morizio asked if anyone is interested in those positions or teaching the subject, send an email to Powers.

Morizio explained that according to Federal Advisory Committee Act (FACA) law TAP meetings are always open to the public except if they are administrative. Alternate panel members are considered to be members of the public and may join teleconferences, but, they cannot vote on decisions. Members of the public, and alternates, cannot join subcommittee meetings since subcommittee meetings are not open to the public. Also, subject matter experts, or other necessary IRS personnel, are NOT considered members of the public since they provide technical expertise guidance to the TAP committees.

### **Chair Comments**

Sykes welcomed everyone and stated that he appreciates the work done in the subcommittees. The Joint Committee meeting held in August was very successful. The TAC committee will modify the mission of their committee. There are plans to think about doing more with the VITA issues in 2015 Sykes asked members to think about the issues they want to work on in the next year. He also stated that if members of TAC are thinking of running for chair or vice chair positions of their committee, this would be a great experience to see the overall picture of how TAP operates.

Morizio stated that the reduction of services issue will be given to the Toll-Free committee for 2015, as TAC will concentrate on other issues.

### **Subcommittee Report Out**

**Issue# 27968** – *Interns/Volunteers* – Jeppson stated that this referral is now in a draft mode. She wants to have another subcommittee meeting to discuss some of the issues before making this final.

**Issue# 28183** – Boyea reported that his subcommittee has a draft. However, he also stated that the goal of TAC is to support the National Taxpayer Advocate, Nina Olson's mission to have cash payments accepted at the Taxpayer Assistance Centers. Boyea also stated that should this draft get rejected by the IRS, the research done will be useful to the referral response posted on [www.TAPSpace.org](http://www.TAPSpace.org).

**Issue# 29722** – Form 2290, *Heavy Highway Vehicle Use* – Goldberg stated that his subcommittee was able to have a discussion with Subject Matter Experts. There are some ideas being brainstormed – that may be possible solutions for this issue.



**Issue# 30084** (*Vita Issues*) – Piard stated that there are 4 recommendations in draft format. Powers will upload them to [www.TAPSpace.org](http://www.TAPSpace.org) for feedback.

**Public Participation**

Dhaitanya Lemons and Edwin Carmona did not have any comments.

**Closing**

Sykes closed the meeting and thanked everyone for attending the call. The next TAC meeting will be on Thursday, October 9, 2014, at 2 p.m. Eastern Standard Time.



**Taxpayer Assistance Center (TAC) Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
August 14, 2014**

**IRS Staff**

- Rose A. Babb – Management Assistant, TAP
- Tamikio Bohler (Absent) – Program Analyst, W&I
- David Desalatte (Absent) – Program Analyst, SA
- Bob Fett (Absent) – Local Taxpayer Advocate, Vermont
- Cindy Jones (Absent) – Supervisor, W&I
- Donna Powers (Absent) – Program Analyst, TAP
- Louis Morizio – Designated Federal Officer
- Beth Braddock – Management & Program Analyst, W&I
- Bill Mezger (Absent) – Portfolio Manager, TAS
- Patty Robb – Program Analyst
- Beth Scott (Absent) – Program Analyst, W&I
- Ellen Smiley – Program Analyst

**TAP Members**

- Juan Aguirre (Absent) – Cuyahoga, OH
- Ralph Boyea – Keaau, HI
- Nancy Dery (Absent) – Sanbornville, NH
- Jamelda Fulton – Greenville, MS
- Daniela Goia – Garden Grove, CA
- Allan Goldberg – Hunter, NY
- Robert Gross – Montpelier, VT
- Catherine Jeppson (Absent) – Los Angeles, CA
- Samuel Kindred (Absent) – Westerville, OH
- Page Moore (Absent) – Omaha, NE
- Robert Phillips – Dallas, TX
- Alphonse Piard – Miami, FL
- Edward Sykes – Rose Hill, KS
- David Thies – Alton, IL
- Hyacinth Tucker (Absent) – Bowie, MD

**Welcome/Announcements**

Morizio welcomed everyone and declared the meeting opened.

**Roll Call & Approval of Minutes**

Quorum was met for this meeting. The minutes for July were approved for posting with a minor edit.

### **Designated Federal Officer**

Morizio joined the teleconference from the Joint Committee (JC) Face-to-Face meeting in Milwaukee, WI. He stated that the JC is reviewing all issues in the new and parking lot status. Sykes will write up next year's project committee proposal on the issues that the TAC will work. Sykes will include those issues that the JC decides on as well.

### **Chair Comments**

Sykes welcomed everyone and stated that a TAC issue has been reduced. He is looking for some suggestions on how to combine the issues.

### **IRS Response**

**Issue #28100**, *Individual Taxpayers Identification Number*. Goldberg stated his subcommittee received some responses from the IRS. He completed and sent out the reconsideration as a pre read via email. The members were asked to take a look at the reconsideration and decide if they want to vote on sending it forward.

### **Subcommittee Report Out**

**Issue# 27968** – *Interns/Volunteers* – Sykes reported for Jeppson's subcommittee. He stated that Kindred sent some comments for the referral to Jeppson. This referral will be finalized within the next few weeks and reported on at the October teleconference.

**Issue# 28183** – Boyea reported that his subcommittee has a draft of the referral response on TAP Space. They are working on getting feedback from the members by 8/19. Once the responses are received from the subcommittee members, the draft will be finalized by September 9, 2014 the next teleconference.

**Issue# 29722** - Form 2290, *Heavy Highway Vehicle Use* – Goldberg stated that there are some Subject Matter Experts, SME scheduled for next week. Goldberg stated that he wants to submit additional information needed upfront so that those questions can be answered at the subcommittee call on August 19, 2014. Those questions for the SME will be given to Powers.

**Issue# 29528** – *Visits to the Taxpayer Assistance Centers Issues* – Thies reported for Moore. Interns are too expensive to have and perform FBI background checks. The walk in center seems to be operating as they should. The only problem is that there can be more funding for the VITA program and this can be a separate issue to take up. It was decided by the full committee that this subcommittee should be disbanded.

**Issue# 30084** *Vita Issues*. Piard stated that his subcommittee has received an answer from SPEC. The referral will be modified since it will not include any funding. The subcommittee will ask for feedback from SPEC to expand VITA sites from 9 to 12 months a year to assist taxpayers with their issues.



### **Outreach**

Goia reported on her outreach; she attended a tax forum in San Diego, CA. Goia and Webster from TAP West met with tax professionals. There were excellent tax questions and answers. Many self-mailers and other TAP materials were given out. There was a lot of traffic at the TAP booth and 22 issues were gathered.

This attended a practitioner meeting with the LTA from Chicago, Illinois.

### **Public Participation**

Leanna Wilson stated that the VITA committee seems interesting and would be interested in attending the next subcommittee meeting. Sykes stated that he will ensure that she receives the information to join the next meeting as a member of the public.

### **Closing**

Sykes closed the meeting and thanked everyone for attending the call. The next TAC meeting will be on Thursday, September 11, 2014 at 2 p.m. EST.

These minutes were approved by the full committee on September 11, 2014.



**Taxpayer Assistance Center (TAC) Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
July 10, 2014**

**IRS Staff**

- Sheila Andrews (Absent) – Director, TAP
- Rose A. Babb – Management Assistant, TAP
- Tamikio Bohler – Program Analyst, W&I
- David Desalatte – Program Analyst, SA
- Bob Fett (Absent) – Local Taxpayer Advocate, Vermont
- Cindy Jones (Absent) – Supervisor, W&I
- Donna Powers – Program Analyst, TAP
- Louis Morizio – Designated Federal Officer
- Beth Braddock – Management & Program Analyst, W&I
- Bill Mezger (Absent) – Portfolio Manager, TAS
- Beth Scott (Absent) – Program Analyst, W&I

**TAP Members**

- Juan Aguirre (Absent) – Cuyahoga, OH
- Ralph Boyea – Keaau, HI
- Nancy Dery – Sanbornville, NH
- Jamelda Fulton – Greenville, MS
- Daniela Goia (Absent) – Garden Grove, CA
- Allan Goldberg – Hunter, NY
- Robert Gross (Absent) – Montpelier, VT
- Catherine Jeppson – Los Angeles, CA
- Samuel Kindred (Absent) – Westerville, OH
- Page Moore – Omaha, NE
- Robert Phillips – Dallas, TX
- Alphonse Piard – Miami, FL
- Edward Sykes – Rose Hill, KS
- David Thies – Alton, IL
- Hyacinth Tucker – Bowie, MD

**Welcome/Announcements**

Morizio welcomed everyone and declared the meeting opened.

**Roll Call**

Quorum was met for this meeting.

**Designated Federal Officer**

Morizio stated that the Annual Regional Planning Committee (ARPC), met a few times recently. They are looking at planning the annual meeting for the month of December as

opposed to March. Some of the tools the ARPC plans to use are from the Online Survey taken in March subsequent to the fact to face meeting. This on line survey was taken by new and returning panel. The team that evaluated and analyzed the results of the survey has put together a report with recommendations. The regional committee will use this as an aid to prepare the training material for next year's face to face meeting. Other portions of the training such as the mentoring program will be presented at the next Joint Committee meeting to tweak.

### **Chair Comments**

Sykes welcomed all to the meeting; he did not have anything new to report. However, in response to Morizio' s office report on the Annual Regional Planning Committee, Sykes asked members if they are interested in serving on the ARPC, they should contact him or Morizio.

### **IRS Response**

**Issue #28100**, *Individual Taxpayers Identification Number*. Some recommendations were adapted by the IRS. Powers will set up a conference call within a week with Wage and Investment. The full committee is invited to participate on this call with subject matter experts to discuss some questions and concerns before preparing reconsideration to the IRS.

### **Subcommittee Report Out**

**Issue# 27968** *Interns/Volunteers* – Jeppson reported that her subcommittee reviewed their draft referral. This referral will be completed by October.

**Issue# 28183** Boyea reported that his subcommittee will recommend that the IRS move forward with the cash payments. Powers stated that she has contacted the Post Office asking for a list of their procedures for cash payments. She mentioned that she expects to have these procedures sent to her before the August monthly teleconference.

**Issue# 29722** *Form 2290, Heavy Highway Vehicle Use* – Powers stated that she has requested subject matter experts and hopes to have a meeting to have the members' questions answered. Powers will send via email some statistical data to the subcommittee before the next meeting as a reference pre read.

**Issue# 29528** – TAC Issues – Powers will send some surveys to Moore. Moore will compile and summarize those surveys and share via email with the subcommittee. Any VITA issues identified will be sent to the VITA committee.

**Issue# 30084** *Vita Issues*. Piard stated that they are working on expanding the VITA program. He also stated that the VITA links will be worked on for improvement- correct address, type of sites and other issues that can enable the public to find the [www.irs.gov](http://www.irs.gov) site useful.



### **Outreach**

Powers reported for Goia. She stated that there were 7 outreach reports submitted for the month of June. There were 15 outreach events, with an audience of 595.

Page attended a practitioner meeting in her home state of Nebraska.

This attended a practitioner meeting with the LTA from Illinois.

### **Public Participation**

There were no members of the public on this call.

### **Closing**

Sykes closed the meeting and thanked everyone for attending the call.

**The next TAC meeting will be on August 14, 2014 at 2 p.m. EST.**





**Taxpayer Assistance Center (TAC) Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
June 12, 2014**

**IRS Staff**

- Lorrie Albritton – Program Owner
- Kay Anderson – Program Analyst, W & I
- Sheila Andrews – Director, TAP
- Rose A. Babb – Management Assistant, TAP
- Tamikio Bohler – Program Analyst, W&I
- Beth Braddock – Management & Program Analyst, W&I
- Bob Fett – Local Taxpayer Advocate, Vermont
- Donna Powers – Program Analyst, TAP
- Lisa McLane – IRS Oversight Board
- Louis Morizio – Designated Federal Officer
- Bill Mezger – Portfolio Manager, TAS
- Beth Scott – Program Analyst, W&I
- Sheila Stevens-Brown – Program Analyst, W&I

**TAP Members**

- Juan Aguirre (Absent) – Cuyahoga, OH
- Ralph Boyea – Keaau, HI
- Nancy Dery – Sanbornville, NH
- Jamelda Fulton (Absent) – Greenville, MS
- Daniela Goia (Absent) – Garden Grove, CA
- Allan Goldberg – Hunter, NY
- Robert Gross – Montpelier, VT
- Catherine Jeppson – Los Angeles, CA
- Samuel Kindred – Westerville, OH
- Page Moore – Omaha, NE
- Robert Phillips – Dallas, TX
- Alphonse Piard – Miami, FL
- Edward Sykes – Rose Hill, KS
- David Thies – Alton, IL
- Hyacinth Tucker – Bowie, MD

**Welcome/Announcements**

Morizio welcomed everyone to the teleconference and turned the meeting over to Sykes.

**Roll Call**

Quorum was met for this meeting. The minutes for May were approved with a minor edit.



### **Chair Comments**

Sykes welcomed everyone; he had a few comments. Sykes mentioned that there will be a meeting next week for all the panel members to discuss members' participation in the monthly meetings.

Powers will update TAPSpace calendar for the full and subcommittee monthly meeting dates and times. Powers asked the members to review the subcommittee notes each month for accuracy and completeness. Members were also reminded to review their TAPSpace committee folder frequently for updates and, to check their spam folders for TAP emails.

The committee chair, Sykes, will send out email reminders to the members each month. The email reminders will also serve to touch base with the members and update the team leads of any information necessary.

Goldberg filled in for Sykes who had to leave the meeting shortly after his comments. He shared with members the IRS Commissioner's approval of the Taxpayer's Bill of Rights (TBOR). Goldberg asked members to take a look at the TBOR at the IRS/Taxpayer Assistance Service website.

The Circular 230 used by tax practitioners as a guide has been revised effective June 12, 2014. There were some major changes, some of those changes involved disclaimers, taxpayer refunds, suspensions, practitioners' responsibilities and procedures that practitioners should be guided by.

### **National Office Report**

Andrews welcomed everyone and had a few announcements. The Executive Director of Systemic Advocacy, Rena Girinakis, has been promoted to the Deputy National Taxpayer Advocate. The new Executive Director of Systemic Advocacy will be Kim Stewart. Stewart has been with TAS for some time so the transition to EDSA will be quick. Stewart will be joining TAP meetings to introduce herself, and will be invited to the Joint Committee Face to Face meeting in August. Both personnel changes are effective June 30, 2014.

The Annual Regional Planning Committee meeting will be held next Tuesday, June 24, 2014, facilitated by Otis Simpson, National Office Analyst. Andrews asked members for any suggestions they may have, which they can give to the analyst of their committee.

Andrews discussed the options of having one big meeting versus having regional face to face meetings. Members were also informed that the meetings must be held at an IRS office in the selected city Washington, DC is very expensive and so, that would probably not be an option for future meetings.

### **Office Report**

Morizio reported that the TAP recruitment interviews phase has wrapped up. The next step is to decide which members' names will go forward to the Treasury Department to



join the panel beginning December 2014. Morizio expressed his appreciation for those members that participated in the interview process.

Morizio stated that the monthly teleconferences are opened and closed by the Designated Federal Officer (DFO) only. If he is absent, the assigned DFO will open and close the meeting. The DFO or acting DFO can make the decision if the meeting should be closed due to lack of quorum or other circumstances that can occur. No one else has that authority to do so. All TAP meetings announced in the Federal Register are open for public comments.

### **Program Owner**

Powers welcomed the new Program Owner, Lorrie Albritton; she welcomed everyone but did not have new announcements.

### **Subcommittee Report Out**

Issue# 27968, *Interns* – Jeppson reported that her subcommittee is not sure what intern programs are currently available at the IRS. Powers provided a website, but it was very difficult to find what the interns' responsibilities with the IRS are from that site. The website did mention some of the benefits, but they did not seem enough to attract anyone to become an intern.

Issue# 28183, *Cash Payments in the TAC* – Boyea reported that his subcommittee met on Tuesday, June 10, 2014. The primary issue discussed was the post office ability to take cash. Sykes sent a report to the subcommittee on May 15, 2014; this report covers the method/process that the post offices use to collect cash. Powers will locate the IRS procedures; she will share with the subcommittee for review.

One very important request by Boyea is that Powers review last year's referral. This will reduce the need for some research that may have been done already. Boyea also mentioned that his subcommittee would be interested in reviewing any recommendations for cash payments that was made by the National Taxpayer Advocate, Nina Olson.

The Cash Payment Subcommittee had some confusion about their subcommittee meeting date. The new date and time is June 24, 2014 at 3 p.m. EST.

Goldberg suggested that the subcommittee dates be made available to the full committee; members can attend other subcommittee meetings and they can provide input. These meetings will be available in TAP Space for members to access.

Issue# 27922 – Form 2290, *Heavy Highway Vehicle Use*. Powers mentioned that Bohler has reached out to a Subject Matter Expert. The SME will be given a date and time to join the TAC calls each month or, as needed.



Issue# 29528 – *Visits to the TACs*. Powers asked if members have any questions, please send them to her; she will set up a subcommittee call and also share that information with Wage and Investment.

Issue#30084 – Powers mentioned that there were 5 VITA issues received. She will provide a list to Wage and Investment. This subcommittee will meet June 23, 2014 at 3:30 p.m. EST.

### **Outreach**

Powers reported for Goia, she stated that there were 5 outreach reports which occurred at 14 events, the total number of audiences were 75,530. There was 1 issue that came out of those outreach events. Continue to send in your outreach reports each month timely.

### **Roundtable**

Sykes will present the issue on the Correspondence Examination White Paper to the Joint Committee at their next meeting; he will suggest the Joint Committee form an Ad Hoc Committee.

### **Public Participation**

There were no members of the public on this call.

### **Closing**

Goldberg and Morizio closed the meeting and thanked everyone for joining. The next TAC meeting will be on July 9, 2014 at 2 p.m. EST.



**Taxpayer Assistance Center (TAC) Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
May 7, 2014**

**IRS Staff**

- Sheila Andrews – Director, TAP
- Rose A. Babb – Management Assistant, TAP
- Tamikio Bohler – Program Analyst, W&I
- Laura Boyd (Absent)
- David Desalatte – Program Analyst, SA
- Bob Fett – Local Taxpayer Advocate, Vermont
- Cindy Jones – Supervisor, W&I
- Donna Powers – Program Analyst, TAP
- Louis Morizio – Designated Federal Officer
- Beth Braddock (Absent) – Management & Program Analyst, W&I
- Bill Mezger (Absent) – Portfolio Manager, TAS
- Beth Scott – Program Analyst, W&I

**TAP Members**

- Juan Aguirre – Cuyahoga, OH
- Ralph Boyea (Absent) – Keaau, HI
- Nancy Dery – Sanbornville, NH
- Jamelda Fulton – Greenville, MS
- Daniela Goia (Absent) – Garden Grove, CA
- Allan Goldberg – Hunter, NY
- Robert Gross – Montpelier, VT
- Catherine Jeppson – Los Angeles, CA
- Samuel Kindred (Absent) – Westerville, OH
- Page Moore – Omaha, NE
- Robert Phillips – Dallas, TX
- Alphonse Piard – Miami, FL
- Edward Sykes – Rose Hill, KS
- David Thies – Alton, IL
- Hyacinth Tucker – Bowie, MD

**Welcome/Announcements**

Andrews welcomed everyone to the teleconference. She mentioned the email that was sent out to members to attend the virtual meeting on May 22, 2014. The TAP staff has finished the ranking of applicants and is now into the interview phase. The Regional Committee will have their meeting to debrief tomorrow. The IRS Commissioner Koskinen discussed the realignment process of W&I and SBSE.



## **Roll Call**

Quorum was met for this meeting.

## **Designated Federal Officer**

Morizio welcomed everyone. He mentioned that the recruitment period has ended. He asked for members' assistance as volunteers for the interview process. Those members interested should contact Babb with their availability.

## **Chair Comments**

Sykes welcomed all to the meeting. He asked if members have any short comments they would like to include in the Regional meeting debrief, they should email him. Sykes also stated that all subcommittees are doing well; he asked for members to volunteer for the VITA Committee.

The minutes for April's meeting were approved for posting.

## **Subcommittee Report Out**

Issue 27968, *Interns/Volunteers* Jeppson reported that her subcommittee is still working this issue. There are lots of questions to be answered – some of those questions are who will pick up the cost for the interns. Powers mentioned that she is reviewing an IRS web link on internships and that some of that the information could be used for recommendations to the IRS.

Goldberg mentioned that the clinical portion of the LITCs have accounting and law school students from universities. They attend court, meet with taxpayers and offer their assistance. Goldberg also mentioned that there could be some fertile ground for TAC to work with.

Issue 27922, Form 2290, *Heavy Highway Vehicle Use* – Powers mentioned that this issue has been given to the TAC by IRS program owners last year. She stated that a subcommittee call will be set up with Goldberg, Goia, Moore, Aguirre and Kindred within the next week to discuss this issue. Powers mentioned that she will include a Subject Matter Expert on the call.

Issue 28183 – Cash Payments in the TACs, Sykes mentioned that there are still some highly technical issues to be worked out. Cost is an important factor including how to get the IRS to accept cash payments. Piard will be drafting up a referral for his subcommittee.

Issue 29528 – TAC Issues, Powers stated that she received five completed questionnaires completed. She asked that members continue to send them in as soon as possible. Thies, Moore, Fulton and Gross will be working with her to establish trends from talking to management and taxpayers online for services at IRS offices. A call will be set up for this subcommittee as well.

Issue 30084 – VITA Issues – Powers mentioned that she has asked TAP analyst to assign any VITA issues they have received within the last six months to the TAC



Committee. Powers has three issues to discuss and will set up a call with – Jeppson, Thies, Gross and Piard.

Issue# 27968 Interns/Volunteers – Jeppson reported that her subcommittee voted to continue with Interns and drop the volunteers from the proposal. She also stated that her subcommittee will be using the information about work study and anything else they can use from the proposal. Powers will provide the information regarding what intern programs already exist at the IRS.

### **Outreach**

Powers reported for Goia, for the month of April, there were four members that submitted outreach in April with an audience of 32. Business cards were sent out to all members that submitted requests.

### **Roundtable**

Members shared their outreach experiences visiting the TAC in their home states and meeting the supervisors and LTAs at the respective locations.

### **Public Participation**

There were no members of the public on this call.

### **Closing**

Sykes closed the meeting and thanked everyone for attending the call. The next TAC meeting will be on June 12, 2014 at 2 p.m. EST.



**Taxpayer Assistance Center (TAC) Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
April 10, 2014**

**IRS Staff**

- Sheila Andrews – Director, TAP
- Rose A. Babb – Management Assistant, TAP
- Tamikio Bohler – Program Analyst, W&I
- David Desalatte – Program Analyst, SA
- Bob Fett – Local Taxpayer Advocate, Vermont
- Cindy Jones – Supervisor, W&I
- Donna Powers – Program Analyst, TAP
- Louis Morizio – Designated Federal Officer
- Beth Braddock – Management & Program Analyst, W&I
- Bill Mezger – Portfolio Manager, TAS
- Beth Scott – Program Analyst, W&I

**TAP Members**

- Juan Aguirre – Cuyahoga, OH
- Ralph Boyea – Keaau, HI
- Nancy Dery – Sanbornville, NH
- Jamelda Fulton – Greenville, MS
- Daniela Goia (Absent) – Garden Grove, CA
- Allan Goldberg (Absent) – Hunter, NY
- Robert Gross – Montpelier, VT
- Catherine Jeppson – Los Angeles, CA
- Samuel Kindred – Westerville, OH
- Page Moore – Omaha, NE
- Robert Phillips (Absent) – Dallas, TX
- Alphonse Piard – Miami, FL
- Edward Sykes – Rose Hill, KS
- David Thies – Alton, IL
- Hyacinth Tucker – Bowie, MD

**Welcome/Announcements**

Andrews welcomed everyone to the teleconference. She mentioned that Lisa Billups will be the acting manager for Morizio for the month of April. Morizio will be back in May. Andrews informed the members that Simpson will set up a teleconference to discuss the survey. Andrews will be sending out National Recognition Week Certificate of Awards to all members via email.

**Roll Call**

Quorum was met for this meeting.



### **Designated Federal Officer**

Powers was the DFO for this meeting; she reported that Friday, April 11, 2014, was the last day for recruitment for TAP. As of this meeting, there are 517 applications in progress, 58 were cancelled and 311 were completed.

### **Chair Comments**

Sykes welcomed all to the meeting; he did not have anything new to report.

### **Subcommittee Report Out**

Issue# 27968 Interns/Volunteers – Jeppson reported that her subcommittee voted to continue with Interns and drop the volunteers from the proposal. She also stated that they will be using the information about work study and anything else they can use from the proposal. Powers will provide the information regarding what intern programs already exist at the IRS.

Boyea reported that his subcommittee did not meet. However, he stated that he sent an email with a summary of what has been done to the subcommittee members. Boyea is requesting feedback on what was accomplished and where to go from there. His subcommittee will meet on May 6, 2014 at 2 p.m.

Powers reported for Goldberg on Issue 28100, *Individual Taxpayer Identification Number*. Goldberg wrote a briefing answering questions for the Joint Committee (JC). This issue was subsequently sent to the IRS by the JC.

### **Outreach**

Powers reported for Goia, she stated that there were seven outreach reports submitted for the month of March.

### **Roundtable**

Members shared their outreach experiences visiting the TAC in their home states and meeting the supervisors and LTAs at the respective locations.

### **Public Participation**

There were no members of the public on this call.

### **Closing**

Sykes closed the meeting and thanked everyone for attending the call. The next TAC meeting will be on May 8, 2014 at 2 p.m. EST.



**Taxpayer Assistance Center (TAC) Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
March 19 – March 21, 2014**

**IRS Staff**

- Sheila Andrews – Director, TAP
- Rose A. Babb – Management Assistant, TAP
- Laura Boyd – Senior Program Analyst, SA
- Sheila Stevens-Brown – Program Analyst, W&I
- Steve Halker – Local Taxpayer Advocate
- LaShawne King – Program Analyst, W&I
- Donna Powers – Program Analyst, TAP
- Louis Morizio – Designated Federal Officer
- Beth Braddock – Management & Program Analyst, W&I
- Beth Scott – Program Analyst, W&I

**TAP Members**

- Ralph Boyea – Keaau, HI
- Nancy Dery – Sanbornville, NH
- Jamelda Fulton – Greenville, MS
- Daniela Goia – Garden Grove, CA
- Allan Goldberg – Hunter, NY
- Robert Gross – Montpelier, VT
- Catherina Jeppson – Los Angeles, CA
- Samuel Kindred – Westerville, OH
- Page Moore – Omaha, NE
- Alphonse Piard – Miami, FL
- Edward Sykes – Rose Hill, KS
- David Thies – Alton, IL
- Hyacinth Tucker – Bowie, MD

**Welcome/Announcements**

Morizio and Powers welcomed everyone to TAC Face to Face Meeting.

**Chair Comments**

Sykes welcomed the members to the face to face meeting. Quorum was met for this meeting.

This portion of the face to face meeting session was a combination of the TAC and the Toll Free Committee.



## **Overview of TAP/TAS**

Morizio and Goldberg discussed the overview PowerPoint presentation. Morizio highlighted some key points- how to reach out to subject matter experts. Goldberg discussed the mission of TAP and its importance.

## **Outreach**

Gross discussed outreach expectations and ideas for good outreach. Some ideas for possible outreach events were discussed, including Accounting Society Meetings, Stakeholder Liaisons, Talk Shows and Enrolled Agent Seminars.

Morizio stressed that it is imperative to provide closure to the taxpayers when performing outreach activities. TAP cannot make legislative changes and, taxpayers should be referred to the appropriate sources to resolve their tax issues.

Members broke out into groups to discuss some barriers to outreach.

### **Some feedback from the group discussions are:**

1. Limited funding
2. People's perception of the IRS
3. Lack of confidence in that nothing gets done

### **Some solutions that were discussed are:**

1. Making contacts throughout the state to set up outreach
2. Knowledge of TAP, members know what TAP can and cannot do
3. Personalities, talk to people in plain language – do not use acronyms

## **Outreach Time Reporting Spreadsheet**

Powers discussed the spreadsheet and provided a PowerPoint presentation on how to complete the time spent and the location where outreach was done. Member's questions were addressed on the subject.

## **Issue Processing**

Armstrong and Powers provided an overview on how the issues submitted by taxpayers are worked. Some of the responses from the IRS to TAP were reviewed as part of the presentation. Members' questions were addressed by Armstrong and Powers.

## **Working with your LTA**

Halker made a presentation and explained his role as an LTA. He mentioned that part of his job is to work with the liaison offices, low income clinics, TAP and other government liaisons. Halker informed members that they should speak to their LTAs and ask them what types of cases they are seeing in their offices.

Halker mentioned that there are lots of changes at TAS – very little money is available to do outreach; however, LTAs are required to visit all LITCs and Congressional Offices.



### **National Taxpayer Advocate**

Olson thanked the members for their volunteer service to the TAP. She discussed the changes in TAS services that will impact the taxpayers. Olson mentioned that this year there were significant cuts including reduction in walk-in sites and answering tax questions, amongst various other cuts. These cuts she mentioned will severely impact the elderly and disabled.

Olson took questions from the panel members on how the budget cuts impact taxpayers. She mentioned that that they members can effectively do outreach to enable the taxpayers to find alternative sources for their tax needs. This she stated can be done during outreach – let the taxpayers know that they can trust the tax system.

### **Closing**

Sykes closed the meeting and thanked the members for attending the meeting.



**Taxpayer Assistance Center (TAC) Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
March 20, 2014**

**Welcome**

Sykes welcomed back the members

**Roll Call**

We had the same attendance as of March 19, 2014.

**Project Committee Review**

D'eredita provided an overview of field assistance; this presentation provided useful information on what her office is charged with. D'eredita entertained questions from the members.

**Travel Procedures**

Morizio provided an overview of the IRS travel policies, some members had questions and those questions were addressed. Morizio also covered outreach activities as it pertains to travel procedures.

**Screening Process**

Powers provided an overview of how the screening process works, there were many questions from the members and those questions were addressed.

**Mentoring**

There was a short discussion on mentoring. It was suggested that all new members be paired with a second or third year member to assist them with their transition.

**Project Subcommittee Work**

The following sub committees were split into three groups and held a discussion: Cash Payments, Interns & Volunteers and Form 2290.

**Project Subcommittee Report Out**

Boyea reported that his subcommittee will set up teleconferences from March until July. They will review the referral form from the previous subcommittee that was rejected and will perhaps rework the issue.

Jeppson reported that her subcommittee needs to identify procedures and tools to give taxpayer grater assistance, improve the services and wait time at the TAC. Jeppson mentioned that her subcommittee would need more information on what interns can do.

Goldberg stated that there are substantial issues that need to be addressed on Form 2290. There are questions on construction with fraudulent companies, and statistical information. Also, he wants to have a technical expert to consult with. Powers stated



that she can provide a Subject Matter Expert form Small Business Self Employment to discuss the issue.

**Closing**

Sykes closed the meeting and thanked the members for attending the meeting.



**Taxpayer Assistance Center (TAC) Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
March 21, 2014**

**Welcome**

Sykes welcomed back the members.

**Roll Call**

We had the same attendance as of March 20, 2014. There were self-introductions from members and the staff.

**TAC Center Visits**

The members accompanied by staff visited the TAC at the IRS site of the meeting. The members were provided the opportunity to ask questions on how the services affect taxpayers. Some issues were identified at the TAC walk in office visit, - the screen monitors messages do require some editing to reflect April 15, 2014 deadline where taxpayers' services will be affected.

**Project Committee Work**

Gross, Goldberg and Chair Sykes had some closing comments. They talked about the importance of TAP, how important it is to write up referrals and send them up to the Joint Committee and the IRS. Sykes stated that he would like to see the IRS executives attending the TAP face to face meetings in the future. He mentioned that this hasn't happened in the last three years.

Morzio and Powers mentioned to the members that they should be proud of the work that they do for the TAP – the quality of the work is important not the quantity.

Local Taxpayer Advocates' Listing was distributed to the members.

**Closing**

Sykes reminded the members that they should consider leadership roles in the TAP, like chair positions. He acknowledged the third year members that will rotate off of the TAP this year and he thanked everyone for attending the face to face meeting.



**Taxpayer Assistance Center (TAC) Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
February 13, 2014**

**IRS Staff**

- Sheila Andrews – Director, TAP
- Rose A. Babb – Management Assistant, TAP
- Laura Boyd – Senior Program Analyst, SA
- Michelle Burger – Senior Advisor, W&I
- Sheila Stevens-Brown (Absent) – Program Analyst, W&I
- Trena Derricott – Program Analyst, TAP
- Bob Fett (Absent) – Local Taxpayer Advocate, Vermont
- Cindy Jones (Absent) – Supervisor, W&I
- LaShawne King (Absent) – Program Analyst, W&I
- Donna Powers – Program Analyst, TAP
- Louis Morizio – Designated Federal Officer
- Beth Braddock – Management & Program Analyst, W&I
- Bill Mezger – Portfolio Manager, TAS
- Beth Scott – Program Analyst, W&I
- Janice Williams – Program Manager, W&I

**TAP Members**

- Juan Aguirre – Cuyahoga, OH
- Ralph Boyea – Keaau, HI
- Nancy Dery – Sanbornville, NH
- Jamelda Fulton – Greenville, MS
- Daniela Goia (Absent) – Garden Grove, CA
- Allan Goldberg – Hunter, NY
- Leni Gonzalez – Arlington, VA
- Robert Gross – Montpelier, VT
- Catherine Jeppson – Los Angeles, CA
- Samuel Kindred – Westerville, OH
- Page Moore – Omaha, NE
- Robert Phillips (Absent) – Dallas, TX
- Alphonse Piard (Absent) – Miami, FL
- Edward Sykes – Rose Hill, KS
- David Thies – Alton, IL
- Hyacinth Tucker – Bowie, MD

**Welcome/Announcements**

Morizio and Powers welcomed everyone to call. Morizio mentioned to the members that when attending TAP outreach events, they should refrain from discussing other issues



outside of TAP. If taxpayers approach members with technical questions, they should be provided the appropriate source of contact on those matters.

### **Chair Comments**

Sykes welcomed all to the meeting; he did not have anything new to report.

### **Status on the following issues**

1. Issue 27922, *Form 2290 Heavy Highway Vehicle Use*, – Goldberg stated that there are still some questions to address. However, the subcommittee will consolidate the Information and discuss it at the TAC Face to Face Meeting in March.
2. Issue 27968, *Interns/volunteers*, – Jeppson stated that some editorial changes will be made and presented at the next subcommittee on March 6, 2014.
3. Issue 28100, *Individual Taxpayer Identification*, – Goldberg stated that the final draft of the response will be made and presented at the March face to face meeting. Subsequently, this draft response will be presented to the Joint Committee in March as well.
4. Issue 28183, *Cash Payments in the TACs* – this subcommittee will setup a teleconference call to refocus on the issue. An email calendar will be sent subsequent to this teleconference call to members

### **Outreach**

Powers stated that there were no outreach activities reported by members for the month of January. Powers will send a monthly reminder to members to send in their outreach reports timely. The spreadsheet should be sent in even if there were no outreach activities for the month.

### **Action Item**

Powers will send a list of Local Taxpayer Advocates via email to members to connect with their local LTA.

### **Roundtable**

Members discussed some technical issues; some of those issues were addressed and others were directed to the appropriate sources.

### **Public Participation**

There were no members of the public on this call.

### **Closing**

Sykes closed the meeting and thanked everyone for attending the call. The next TAC meeting will be a face to face meeting held on March 19, 2014 through March 21, 2014 in Jacksonville, FL.



**Taxpayer Assistance Center (TAC) Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
January 16, 2014**

**IRS Staff**

- Sheila Andrews – TAP Director
- Justin Axelrod – Supervisor, NTA
- Rose A. Babb – Management Assistant
- Laura Boyd – Systemic Advocacy Program Analyst
- Michelle Burger – Senior Advisor, W&I
- Sheila Stevens-Brown – Program Analyst, W&I
- Bob Fett – Local Taxpayer Advocate, Vermont
- Cindy Jones – Supervisor, W&I
- LaShawne King – Program Analyst, W&I
- Donna Powers – Program Analyst
- Louis Morizio – Designated Federal Officer
- Beth Braddock (Absent) – Management & Program Analyst, W&I
- Bill Mezger – TAS Portfolio Manager
- Deb'orah Momon – Townsend-Program Analyst/Liaison, W & I

**TAP Members**

- Juan Aguirre – Cuyahoga, OH
- Ralph Boyea – Keaau, HI
- Nancy Dery – Sanbornville, NH
- Jamelda Fulton – Greenville, MS
- Daniela Goia – Garden Grove, CA
- Allan Goldberg – Hunter, NY
- Leni Gonzalez – Arlington, VA
- Catherine Jeppson – Los Angeles, CA
- Samuel Kindred – Westerville, OH
- Page Moore – Omaha, NE
- Robert Phillips (Absent) – Dallas, TX
- Alphonse Piard – Miami, FL
- Edward Sykes – Rose Hill, KS
- David Thies – Alton, IL
- Hyacinth Tucker – Bowie, MD

**Welcome/Announcements**

Morizio welcomed everyone to the first teleconference of 2014. Morizio is also the Designated Federal Officer for the TAC Teleconferences. Powers also welcomed all and asked the members and staff to introduce themselves.



## **TAP Director**

Andrews welcomed the members and thanked them for volunteering their service to TAP.

## **Program Owner**

The program office staff introduced themselves and provided an overview of their functions as it related to TAP work.

Morizio mentioned that there is a reduction in services to taxpayers at TAC walk-in centers. He asked the committee members to visit their local TAC office to get some feedback from both taxpayers and staff. This will be an internal survey with questions prepared by TAP staff and by reviewed by the Program Office staff prior to distribution to the members. Momon-Townsend will provide access for the taxpayers to access those TAC offices.

## **Methods of Communications**

Powers reviewed the following with the members:

1. Powers asked members to review their profiles on TAP Space and, ensure that they have chosen the TAC committee. In addition, she asked that members add their profiles if they have not done so as yet. If there are any questions, members are asked to contact Powers or the database analyst.
2. Once members have joined the teleconferences, they should exercise telephone etiquette- mute their phones \*6 to mute when not speaking and the same to unmute to speak.
3. The monthly minutes for each minute are reviewed at the next meeting each month for approval before posting to Improveirs.org for the public to view.
4. A quorum of 50% plus 1 is sufficient to conduct official business. If quorum is not reached, then members cannot decide on issues or make recommendations.
5. There will be an online survey given after the annual meeting in March. This survey will enable TAP members to comment on how the training and other aspects of TAP program can be improved.
6. All emails sent to Powers should have a copy to Morizio in the event Powers is on leave.
7. The definition of consensus: Although members will have their differences in opinion on various issues, each committee is expected to come to a decision that is acceptable.



8. The field assistance report will be shared each month with members; this report tracks complaints that come in on the IRS Webpage and the Toll Free lines.

### **2013 Referrals**

#### **Subcommittees were formed to work the following issues:**

1. Issue 27922, *Form 2290 Heavy Highway Vehicle Use*, – will be worked by Goia, Moore and Goldberg (lead)
2. Issue 27968, *Interns/volunteers*, will be worked by Jeppson (lead), Tucker, Gross Boyea and Moore
3. Issue 28100, *Individual Taxpayer Identification*, – will be worked by Tucker, Goia, Gonzalez and Goldberg (lead).
4. Issue 28103, *Virtual Service Delivery*- the committee has agreed to drop this issue.
5. Issue 28183, *Cash Payments in the TACs*, this issue will be worked by Sykes, Dery, Thies and Piard (lead).

Note: Subcommittee calls will be set up subsequent to this TAC Teleconference in February.

### **Screening Committee**

Fulton has volunteered to review the list of screening issues and provide an update during TAC's monthly teleconference call.

### **Quality Review**

Goldberg and Moore have volunteered to review the QR issues before sending any forward for elevation.

### **Chair and Vice Chair Elections**

Edward Sykes was elected Chair and Daniela Goia was elected Vice Chair of the TAC Committee.

### **Outreach**

The Vice Chair is in charge of outreach and represents the committee by providing a brief report on outreach at each monthly committee. Powers will send members a spread sheet that will be used monthly to submit their reports. Outreach can be formal or informal (members can should refer to their hand book for more details).

### **Public Participation**

There were no members of the public on this call.



### **Closing**

Sykes closed the meeting and thanked everyone for attending the call. TAC meetings will be held the second Thursday of each month at 2 p.m. Eastern Standard Time.

The next teleconference is scheduled for Thursday, February 13, 2014 at 2 p.m.