



**2017 Meeting Minutes
Taxpayer Assistance Center (TAC) Project Committee**

- Nov. 14, 2017
 - Oct. 17, 2017
 - Sept. 19, 2017
 - Aug. 15, 2017
 - July 18, 2017
 - June 20, 2017
 - May 16, 2017
 - April 18, 2017
 - March 23-24, 2017
-

**Taxpayer Assistance Center (TAC) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Nov. 14, 2017**

Designated Federal Officer

- Gilbert Martinez Acting Designated Federal Officer

Attendance

- | | | |
|------------------------------|-------------------------|--------|
| • Richard "Kent" Christensen | Boise, ID | Member |
| • Josiah Berry | Greenwood, IN | Member |
| • Michelle Brookens | Taylorville, IL | Member |
| • Tasheka Dorsey | Darrow, LA | Member |
| • Gary Hoff | Hot Springs Village, AR | Member |
| • Holly Hoffman | Amherst, WI | Chair |
| • Joseph Holley | Barboursville, WV | Member |
| • Manny Illickal | Syosset, NY | Member |
| • Scott Wallace | Zephyr Cove, NV | Member |

Members Absent

- | | | |
|------------------|-------------------|------------|
| • Felicia Horton | Lexington, KY | Member |
| • David Jones | Hickory Creek, TX | Vice Chair |

Staff

- Susan Jimerson, Acting TAP Director
- Lisa Billups, Senior Program Analyst
- Matthew O'Sullivan, Program Analyst



- Antoinette Ross, Program Analyst
- Debra Awalt, W&I
- Tamikio Bohler
- Rosemary Rixey
- Annie Gold, TAP Administrative Assistant

Member of Public

None

Roll Call

Quorum was met.

Opening/Welcome – Gilbert Martinez

Martinez welcomed everyone to the meeting. He pointed out how vital the work members perform is to the success of the TAP program. He shared appreciation to each member for their continual dedication and hard work.

National Office Report – Susan Jimerson

Jimerson welcomed everyone to the call. She stated her Acting TAP Director assignment will continue through the month of November. Cedric Jeans will be Acting TAP Director for the month of December until the selection has been made. She expressed congratulations to all the committees for the work done this year. The project proposals and the referrals that have been submitted have been well thought out. The contributions made by each member in participating on conference calls, the outreach completed, number of hours spent was well over 1,800 hours volunteering. Thank you for the tremendous efforts in making an impact to the Taxpayers Assistance Center. Congratulations to the retiring members: Scott Wallace, Richard Christensen and Josiah Berry. Berry and Wallace worked as committee Leads and Christensen as hair. They are leaving TAP in good standing for the members coming aboard. They reached over 6,600 people throughout the past year.

The new member package has been approved by the National Taxpayer Advocate, Nina Olson. One of the final actions by the IRS Commissioner was to sign off on the package. It is now in the Office of the Treasury. The anticipation is to start the TAP year earlier than in the past. There will be a solicitation going out to returning members for their choice of committee to work on in TAP year 2018. The returning members will be called upon to be mentors for new members coming aboard, we encourage you to become a mentor. New material is being developed for training and new member orientation. We are reviewing the proposals for the projects members will work for TAP year 2018.

Chair Report – Holly Hoffman

Hoffman stated she is still waiting to receive statements from members to encourage the new members coming aboard. Thank you to Wallace,



Christensen, and Tasheka Dorsey for submitting their statements. Members were encouraged to contact Hoffman via email or phone call. Hoffman is working with Billups to put together project documents for the committees. This will be done to show the new members coming aboard some things they will be working on. She expressed thank you to the members who voted for the chair and vice chair positions. Hoffman recognized the retiring members; Berry, Christensen, and Wallace. She stated each retiring member offered to be available for contact and they will be utilized.

Public Input

None

Approval of Minutes

Oct. 17, 2017 minutes approved.

Program Owner Report – Debra Awalt

Awalt stated there were no updates to report. She expressed appreciation and thank you to the full committee and members retiring for all their dedication and hard work performed.

Subcommittee Updates

Subcommittee I

Berry stated the subcommittee completed some minor edits and the referral is now with the Joint Committee for review. The Subject Matter Expert (SME) cancelled and could not meet with the subcommittee during their last meeting. They have placed the SME on their agenda for next year. He thanked the subcommittee for their hard work. He also thanked others for their assistance.

Subcommittee II

Hoffman stated the subcommittee for the Online Services did not have a report. The subcommittee will meet to discuss Issue 35999, Improve Awareness of Utilization of Online Services. Many of the suggested changes by Systemic Advocacy were related to the website changes.

Decision: Full Committee Consensus to move forward with Issue 35999 to the Joint Committee quality review.

Outreach Report

Hoffman stated David Jones wanted information shared about Joseph Holley. Holley did a great job in getting information out through Outreach. Members were encouraged to get involved in the VITA Outreach that is held in mid-November, December, and January. Volunteers will be trained. Opportunity to work with the Stakeholder Liaison will be available. There will be an article prepared on the Outreach effort by members. Hoffman is scheduled for a meeting in December



and January to discuss outreach. Encouragement was given to members to get out there and take advantage of the good opportunities. Billups added members have volunteered over 1,800 hours and reached an audience over 6,600. She expressed thank you to everyone for a job well done. Christensen expressed his appreciation to the committee and to Holley and Wallace. He encouraged members to continue and reach out for assistance.

Action Items:

Billups stated the following action items:

- Post the draft minutes to www.TAPSpace.org as a pre-read for the first 2018 TAC meeting and forward to TAP Secretary for posting to Adminwww.Improveirs.org.
- Forward referral on Issue 35999 to be place on Joint Committee's agenda.

Thank you to every member for all the hard work and dedication. Jimerson added there will be a newsletter with information on the upcoming TAP year and it will include information on the new member selections, the retiring members, Presidential Awards and other things of interest to TAP members. This will help keep members engaged as to what is going on. Martinez also expressed his appreciation to the retiring members and Hoffman for her leadership.

Closing

Martinez closed the meeting.

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



**Taxpayer Assistance Center (TAC) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Oct. 17, 2017**

Designated Federal Officer

- Susan Jimerson, Designated Federal Officer

Attendance

- | | | |
|-----------------------|-------------------|------------|
| • Josiah Berry | Greenwood, IN | Member |
| • Richard Christensen | Boise, ID | Member |
| • Joseph Holley | Barboursville, WV | Member |
| • Holly Hoffman | Amherst, WI | Chair |
| • Felicia Horton | Lexington, KY | Member |
| • David Jones | Hickory Creek, TX | Vice Chair |
| • Scott Wallace | Zephyr Cove, NV | Member |

Members Absent

- | | | |
|---------------------|-------------------------|--------|
| • Michelle Brookens | Taylorville, IL | Member |
| • Tasheka Dorsey | Darrow, LA | Member |
| • Gary Hoff | Hot Springs Village, AR | Member |
| • Manny Illickal | Syosset, NY | Member |

Staff

- Cedric Jeans, Acting TAP Director
- Lisa Billups, Senior Program Analyst
- Matthew O'Sullivan, Program Analyst
- Antoinette Ross, Program Analyst
- Tamikio Bohler, W&I
- Rosemary Rixey, W&I
- Annie Gold, TAP Administrative Assistant

Roll Call

Quorum was met.

Opening/Welcome – Susan Jimerson

Jimerson welcomed everyone to the meeting. An informational call was held on today for the members interested in being nominated or nominating another member for the TAP chair or vice chair position. Richard “Kent” Christensen was available to answer questions on the position responsibilities. All nominations are due by Oct. 19, 2017. All statements from the nominees are due Oct. 23, 2017, and will be posted onto www.TAPSpace.org. A “Meet the Candidates” session is scheduled for Oct. 24, 2017, at 2 p.m. ET. The announcement of the selection for TAP chair and vice chair will be announced Nov. 2, 2017. There are two Joint



Committee (JC) meetings remaining. The next one is scheduled for Oct. 25, 2017 and the final meeting will be held on Nov. 29, 2017. The JC is looking at scheduling an additional meeting to review referrals around the second week of November. A notice would have to be placed in the Federal Register for the additional meeting. An email was sent to the committees to find out the number of referrals still pending.

National Office Report – Cedric Jeans

Jeans welcomed everyone to the call. He stated the informational session was a good one. Members were encouraged to submit names to be nominated for the TAP chair and or vice chair position. Self-nominations are encouraged. The Recruitment cycle is coming to completion. The retiring members from TAP will be asked to participate in an informative session benefiting new members coming aboard to get acclimated into TAP. More information will be sent on this. There are several referrals still waiting to be completed. Members were encouraged to get all referrals completed and forwarded over to the JC in time. Members were also encouraged to participate in the member survey that will be sent out. Lisa Billups sent out some information on the disasters that have been occurring. Billups stated she sent out an informational video on how to reconstruct records and being prepared for disasters. If there are any topics members would like more information on send requests to Billups.

Chair Report – Holly Hoffman

Hoffman stated she has enjoyed working with the committee this year. Each member has made a mark on TAP and it is something to be proud of. Next month recognitions for the third-year members leaving TAP will be done. The TAP support staff was recognized for all the assistance and guidance provided to members to be successful on the committees. Members were asked to complete their reflection of time as a member of TAP. Anything members would like to have highlighted about TAP will be accepted. All statements can be emailed to Hoffman before Nov. 21, 2017. Hoffman suggested the full committee's next meeting be moved up to Nov. 14, 2017, at 4 p.m. ET. This will allow enough time to complete the referrals and get them through the process and on the JC's agenda. The election for TAP chair and vice chair is open to first and second year members. Nominations can be sent to Gretchen Swayzer.

Approval of Minutes

Sept. 19, 2017, minutes accepted as amended.

Program Owner Report – Rosemary Rixey

Rixey stated there were no updates to report. Tamikio Bohler expressed thank you to members who will be rolling off the committee.

Subcommittee Updates

Subcommittee 1



Josiah Berry stated the subcommittee had a few edits remaining. FAQ could go forward after deliberations and the subcommittee is ready to vote to move forward with the transcript referral.

Decision: Full Committee Consensus to move forward with recommendation.

Berry added the subcommittee had requested information from the Subject Matter Expert (SME) on the Certified Acceptance Agents handling victims of ID theft ID verifications. Alternative are being considered. Billups added the SMEs have been contacted to attend the subcommittee's next meeting to share information on the Certified Acceptance Agent program currently used for the ITIN process. The team is considering whether to recommend an extension of the program.

Subcommittee 2

David Jones stated referral 35999; Improve Awareness of Utilization of Online Services was submitted to the Systemic Advocacy (SA) and Attorney Advisor but was returned from SA with suggestions and comments. They are waiting for any comments from the Attorney Advisor. The subcommittee is working on partnering with IRS when addressing questions after the filing season. Billups added a list of questions was developed for the SME.

Outreach Report

Jones stated Joseph Holley has some interesting involvement to share. Holley informed the committee along with Billups and Gilbert Martinez how they put together an article that highlighted TAP and the things that are going on within TAP. There have been three positive responses. One has been published; one is coming out this week. One will be coming out in the West Virginia Newsletter but will not be available for our viewing until next month. The articles were produced from the taxpayers' perspective coming from all walks of life. The information can be shared with everyone. Holley will share the work document with Billups to forward to the committee. Jones added he received additional activity reports after receiving the consolidated report. He will put together a report highlighting all outreach activities within the next week.

Action Items

Billups stated the action items:

- Schedule the next full committee meeting for Nov. 14, 2017 beginning at 4 p.m. ET, 3 p.m. CT and make sure the Federal Register is updated.
- Correct the minutes and post to www.TAPSpace.org.
- Couple of edits to the referral that was approved from the Transcript Committee. Once received forward to Swayzer to place on Joint Committee's agenda.



Closing

Jimerson closed the meeting.

Next Meeting Nov. 14, 2017 at 4 p.m., ET

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



**Taxpayer Assistance Center (TAC) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Sept. 19, 2017**

Designated Federal Officer

- Gilbert Martinez Acting Designated Federal Officer

Attendance

- | | | |
|------------------------------|-------------------------|------------|
| • Josiah Berry | Greenwood, IN | Member |
| • Michelle Brookens | Taylorville, IL | Member |
| • Richard “Kent” Christensen | Boise, ID | Member |
| • Joseph Holley | Barboursville, WV | Member |
| • Gary Hoff | Hot Springs Village, AR | Member |
| • Holly Hoffman | Amherst, WI | Chair |
| • Felicia Horton | Lexington, KY | Member |
| • Manny Illickal | Syosset, NY | Member |
| • David Jones | Hickory Creek, TX | Vice Chair |
| • Scott Wallace | Zephyr Cove, NV | Member |

Members Absent

- Tasheka Dorsey Darrow, LA Member

Staff

- Susan Jimerson, Acting TAP Director
- Lisa Billups, Senior Program Analyst
- Matthew O’Sullivan, Program Analyst
- Sheila Stevens Brown, W&I
- Beth Braddock, W&I
- Johnny Beale, W&I
- Tamikio Bohler, W&I
- Rosemary Rixey, W&I
- Annie Gold, TAP Administrative Assistant

Roll Call

Quorum was met

Opening/Welcome – Gilbert Martinez, Acting DFO

Martinez welcomed everyone to the meeting. Martinez stated Susan Jimerson is the Acting TAP Director and he is Acting DFO for this meeting. The committees in TAP West are wrapping up the referrals to get them ready for Joint Committee (JC) review by the end of the year. Martinez reviewed the agenda.

National Office Report – Susan Jimerson, Acting TAP Director



Jimerson welcomed everyone to the call. Javier Hernandez completed his detail to TAP and Jimerson is now the Acting TAP Director. For the month of October, Cedric Jeans will be the Acting TAP Director. The final selection for the Director is forthcoming. The TAP 2018 chair/vice chair election season is approaching. Gretchen Swayzer is the lead analyst who is coordinating the election process, she will be sending an email for member nominations. Kent Christensen is the election official. More information will be sent out by the end of the month. Members were encouraged to nominate someone or they may nominate themselves.

The deadline to submit the chair reports for the Annual Report was last week. The new member and alternate recommendations for the 2018 panel have been made, Sheila Andrews will review and approve before the background checks are completed. There are three JC meetings remaining this year. The committees are working to complete referrals in order to get them on the JC's agenda. The new improved www.IRS.gov web page has been launched on www.IRS.gov. Members are encouraged to go to the site and look at any possible ways to improve the website. Members were reminded to turn in their Activity Reports. After the third year, members' activities are reviewed to see which Presidential Award they may qualify. We take into consideration all of the time volunteered.

Chair Report – Holly Hoffman

Hoffman stated the committee is getting closer to the end of the TAP year. She added how impressed she is with the members' efforts in getting the referrals completed to be ready for the JC. Thank you to all members who contributed to the chair report for the Annual Report, Hoffman will add as more reports come in.

Approval of Minutes

Aug. 15, 2017, minutes approved as amended.

Program Owner Report – Tamikio Bohler

Bohler stated there were no updates to report.

Subcommittee Updates

Subcommittee 1

Josiah Berry stated the Transcript subcommittee has been working to complete the referral on third party transcript recipients. The referral addresses the need of educational and other third party institutions to understand what to expect when they receive a transcript from students that may have been pulled from www.IRS.gov, etc. This will help the institution discern whether the transcript is legitimate. The committee identified possible edits for better clarity. The full committee decided to send this referral back to the subcommittee and review during next month's meeting. Hoffman asked if the Certified Acceptance Agent program was still available. The submitter wants the program expanded to the



verification of identity for those who have been a victim of ID theft as an alternative to having to visit a TAC. Lisa stated the committee is asking IRS to expand the program. This issue will be assigned to the Transcript committee and a subject matter expert (SME) will be requested.

Subcommittee 2

David Jones stated the Online Services subcommittee completed their referral. It was forwarded to the QR team with a response deadline by Sept. 20, 2017. He will incorporate some additional edits once it is received back from QR. Jones thanked the first year members for stepping up and contributing. Hoffman thanked the subcommittee for their efforts.

Outreach Report

Jones stated he reviewed the activity report that was sent on Sept. 5, 2017. There is one active member who has yet to submit an activity report. He shared appreciation for the members who put in extra efforts in getting their reports submitted. Based on the report sent on Sept. 5, 2017, the committee has a total of 1,361 hours which includes 206 hours of Outreach, 74 hours of events conducted, reaching an audience of 6,344. Billups reminded the members to contact their respective Local Taxpayer Advocates (LTAs) to partner with on future outreach events and to contact her if they encounter any problems, she will facilitate a discussion with the LTA.

Gary Hoff shared a new issue to be considered. Some taxpayers are not able to get answers to tax questions after the filing season has ended. Tax practitioners often provide tax relief information to victims when there is a disaster; however, they are not utilized to answer basic tax questions after the filing season on a pro bono basis. Hoff indicates many tax practitioners are willing to take phone calls to answer tax questions. TAC offices are not allowed to answer questions on tax law after the end of filing season. Bohler stated there are tax law questions and answers online available for those who have access to a computer and the internet. This suggestion would involve a partnership with IRS National Public Liaison.

Decision: Full Committee consensus to add as new issue and assign to the Online Services subcommittee.

Action Items

Billups stated there are two action items:

- Keep open the Certified Acceptance Agent issue and assign to online transcript subcommittee
- Post approved minutes with changes identified
- Assign new Issue discussed to Online Services subcommittee

Closing



Martinez closed the meeting.

Next Meeting Oct. 16, 2017 at Noon PT

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



**Taxpayer Assistance Center (TAC) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Aug. 15, 2017**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer

Attendance

- | | | |
|-----------------------------|-------------------------|------------|
| • Josiah Berry | Greenwood, IN | Member |
| • Richard “Kent”Christensen | Boise, ID | Member |
| • Tasheka Dorsey | Darrow, LA | Member |
| • Joseph Holley | Barboursville, WV | Member |
| • Gary Hoff | Hot Springs Village, AR | Member |
| • Holly Hoffman | Amherst, WI | Chair |
| • Felicia Horton | Lexington, KY | Member |
| • Manny Illickal | Syosset, NY | Member |
| • David Jones | Hickory Creek, TX | Vice Chair |
| • Scott Wallace | Zephyr Cove, NV | Member |

Members Absent

- Michelle Brookens Taylorville, IL Member

Staff

- Sheila Andrews, TAP Director
- Javier Hernandez, Acting TAP Director
- Susan Jimerson, Designated Federal Officer
- Lisa Billups, Senior Program Analyst
- Antoinette “Toni” Ross, Program Analyst
- Gilbert Martinez, TAP Analyst
- Sheila Stevens Brown
- Beth Braddock, W&I
- Tamikio Bohler
- Rosemary Rixey
- Annie Gold, TAP Administrative Assistant

Member of Public

None

Roll Call

Quorum was met

Opening/Welcome



Susan Jimerson welcomed everyone to the meeting and reviewed the agenda. The committee members were informed now is the time to begin getting all referrals completed and ready for the Joint Committee (JC). The TAP year ends on November 30, 2017. The JC's last meeting is scheduled for November 29, 2017. There are four JC meetings remaining. Once the referrals have been written they go through the internal committee quality review, to the Systemic Advocacy (SA) and on to the Attorney Advisor for review. Members were encouraged to try and have the referrals ready for the full committee by October 17, 2017. If it is approved by the full committee it will go to the JC for their review. The JC prefers to have a week to review the referrals. Their meeting is scheduled for October 25, 2017. The JC will have a planning session on August 22-23, 2017. They will look at the strategies for 2018. Lisa Billups sent out solicitation for ideas needed for the 2018 Project Proposal and to determine what TAP will work on in 2018. The Annual Report lead analyst will send out the Chair report template within the next week. Members are encouraged to look it over and put together ideas, successes and challenges. If there are any members who have not joined the TAP Facebook group are encouraged to do so.

National Office Report – Sheila Andrews/Javier Hernandez

Javier Hernandez welcomed everyone to the call. The JC planning session will be held in Memphis next week. Following the meeting there will be a face to face meeting with the analysts to go over next year initiatives. Hernandez stated he is looking forward to the members along with the Chairs' input, ideas, and what each will bring to the table as far as what TAP would work on in 2018. Members were encouraged to continue with their communication, dedication, and leadership. Input from each member is needed on how things have been going in TAP. Suggestions on what could be done better, or what needs to be changed is welcomed. Hernandez is looking forward to members providing input. This will help the success in completing the mission of TAP for taxpayers. Member input will assist with outreach as well. Your feedback allows TAP to make things better. Meetings with the interview leads have begun to go over the recommendations for the 2018 panel, decisions will be made soon.

Chair Report – Holly Hoffman

Holly Hoffman welcomed everyone to the call. Michelle Brookens could not attend the call on today. There is a need to conduct outreach and members to reach out to the local communities. Members are encouraged to talk with people and share what is learned, it helps to uphold the mission of TAP. Having a strong presence in the community helps with credibility and gives opportunity to gather issues. When doing outreach remember to report everything on the activity reports. Recognition was given to David Jones and Felicia Horton. They provided feedback on Publication 4491. Wage and Investments loved their idea. Jones stated he and Horton volunteered to review some of the publications for Volunteer Income Tax Assistance (VITA). They reviewed Publication 4491



training manual. They viewed a couple of sections in the manual. One section was on reporting of income. Relative to Identity Theft, IRS is doing a test on W2 security codes. One of suggestion made will be included in Publication 4491, it related to the new security code process. Hoffman stated this is exciting, it helps to elevate TAP and upholds the mission. Thank you expressed to Jones and Horton for doing a great job. Hoffman stated she sent out an email asking for suggestions for project proposals and type of work for the upcoming TAP year, all feedback needs to be in to her by August 20, 2017.

Public Input

None

Approval of Minutes

July 18, 2017 minutes approved as amended.

Program Owner Report – Debra Awalt

Tamikio Bohler and Rosemary Rixey stated they had no updates.

Subcommittee Updates

Subcommittee 1

Josiah Berry stated the Subcommittee has one Transcript FAQ proposal almost completed. They had a good discussion during the last meeting. Some small edits was done. Lisa Billups suggested make a second review of the referral. Berry will send Brookens an email for the changes and will be ready for update at the next full committee meeting.

Subcommittee 2

David Jones stated he sat in on the transcript meeting. The Online Services Subcommittee had pulled up the referral form. They flushed out the project and goal statements, and assigned members various parts of the referral. Billups did a lot of research. Jones will consolidate all the responses and add them onto the referral. If there are any questions members were encouraged to reach out. They are hopeful by the next meeting to have the referral ready and send to the JC for review. Joseph Holley asked how the employers would know what the authentication code on W2 for the VITA sites were. Jimerson stated the staff will research and bring the answer back. Tamikio Bohler stated the W2 verification code has to be shared with the taxpayer at the time of filing. The information is found on www.IRS.gov website.

Outreach Report

David Jones gave an update on the hours reported and meeting he had with Hoffman and Billups. Several hundred additional hours were received. As of July 25, 2017, the committee had a total of 1,072 hours of activity reporting. There were 169 pertained to outreach hours for activities. For all of the



committees there were a total of 61 outreach events. There was one issue reported. The total number of outreach hours, 169; audiences reached, 6242. Members were encouraged to get the reports completed.

Action Items:

Billups stated there are two action items:

- Follow up with Brookens on suggested changes to the referral
- Add to www.improveirs.org website and highlight what members are doing in TAP

Billups added if any members have ideas as to what they would like added to www.Improveirs.org or would like to include an article about a particular successful outreach, please share it with her and she will add it in to the website.

Closing

Susan Jimerson closed the meeting.

Next Meeting September 19, 2017 at Noon, PST

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



**Taxpayer Assistance Center (TAC) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
July 18, 2017**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer

Attendance

- | | | |
|---------------------------------|-------------------------|--------|
| • Josiah Berry | Greenwood, IN | Member |
| • Michelle Brookens | Taylorville, IL | Member |
| • Richard "Kent"
Christensen | Boise, ID | Member |
| • Joseph Holley | Barboursville, WV | Member |
| • Gary Hoff | Hot Springs Village, AR | Member |
| • Holly Hoffman | Amherst, WI | Chair |
| • Felicia Horton | Lexington, KY | Member |
| • Manny Illickal | Syosset, NY | Member |
| • Scott Wallace | Zephyr Cove, NV | Member |

Members Absent

- | | | |
|------------------|-------------------|------------|
| • Tasheka Dorsey | Darrow, LA | Member |
| • David Jones | Hickory Creek, TX | Vice Chair |

Staff

- Sheila Andrews, TAP Director
- Javier Hernandez, Acting TAP Director
- Susan Jimerson, Designated Federal Officer
- Lisa Billups, Senior Program Analyst
- Antoinette "Toni" Ross, Program Analyst
- Gilbert Martinez, TAP Analyst
- Stephanie Harrison-Colbert, SBSE
- Sheila Stevens Brown, W&I
- Lashaun King
- Beth Braddock, W&I
- Frances Flore, W&I
- Tamikio Bohler
- Cindy R. Jones
- Betty Scott
- Johnnie Beale
- Rosemary Rixey
- Debra Awalt



- Annie Gold, TAP Administrative Assistant

Member of Public

None

Roll Call

Quorum was met

Opening/Welcome

Susan Jimerson welcomed everyone to the meeting and reviewed the agenda. The Tax Forum in Dallas, Texas begins on July 25, 2017. The members who are attending have already been approved and arrangements have been made for their travel. The Internal Communications Committee had their meeting last week. They discussed the June and July Newsletters. Both newsletters have completed and members are encouraged to take a look at them. Thank you to all members who provided information to be included in the Newsletter. The Newsletter will be sent out to all members and alternates. The Internal Communications Committee has done a very good job with the Newsletters. The Interviews have all been completed and we are moving into the Recommendation phase. Volunteer Income Tax Assistance (VITA) product reviews will include TAP. This review involves reviewing VITA publications and training products and making suggestions for improvement.

National Office Report – Sheila Andrews/Javier Hernandez

Hernandez stated recruiting has moved to the next phase of recommendation and background clearances. Thank you to all members who volunteered to help conduct the interviews and who provided feedback for each applicant. The TAP management staff: Sheila Andrews, Javier Hernandez, Susan Jimerson and Cedric Jeans are together in Indianapolis for a meeting to discuss where TAP has been, is now and where TAP is heading. They are looking to make improvements in areas that they can, ways to make things better for members, provide adequate support and necessary research needed to be successful at the TAP mission. Hernandez is looking forward to further discussions with members. Lisa Billups has set up a meeting with the new members to discuss mentoring and how to better serve members and alternates. The Joint Committee will be (JC) meeting Aug. 22 and 23, 2017, to discuss the next year and where TAP is headed. Hernandez is looking forward to meeting as many TAP Chair members as possible.

Chair Report – Holly Hoffman

Hoffman stated she is very excited how the committee and subcommittees are moving forward and looks forward to their reports. It is exciting that the Transcript subcommittee is moving forward with their referral. Parking lot issues were discussed at the JC's meeting. There is a need for more outreach to be done. The Parking lot inventory is low. Taxpayers and tax practitioners could provide

some good feedback that could produce some issues. Any questions on outreach, speak with senior members on the committee or analyst for assistance. Members were encouraged to utilize social media accounts to generate possible issues. Hoffman reminded members to make sure to get the activity reports in on time in order for the staff to have timely and accurate information about TAP's activities to post. If any are missing, update and turn them in, they will still count at the end of the year. Hoffman added she had contact with her Local Taxpayer Advocate (LTA) IRS Stakeholder Liaison on the ITIN renewal process. There will be an ITIN Webinar on Aug. 10, 2017, Lisa Billups will post on www.TAPSpace.org for anyone who would like to register. A solicitation went out for participants to work on the Annual Report. The new member interviews have been completed and appreciation was shared for participating.

Review of Parking Lot Issues

Holly stated:

- **Issue 33693**, process is explained in the IRM. Committee recommends this issue be dropped.
Decision: Full Committee consensus DROP
- **Issue 35423**, receipt of letter to appear in person. Suggested a Certified Acceptance Agent could handle instead. Committee recommends this issue be assigned to the Transcript Subcommittee and report back to Full Committee.
Decision: Full Committee consensus is to assign to Transcript Subcommittee and they report back
- **Issue 35473**, receipt of letter to revalidate identity. Committee recommends this issue be dropped.
Decision: Full Committee consensus DROP
- **Issue 36113**, access client's account they thought a credit card was needed. Committee recommends this issue be dropped.
Decision: Full Committee consensus DROP

Holly Hoffman stated the TAP Manager Surveys from last year are posted. There might be some possible future issue resulting from the surveys. The survey responses are on www.TAPSpace.org look for TAP 2016 Subcommittee 1 folder.

Public Input

None

Approval of Minutes

June 2017 minutes approved as amended.



Program Owner Report – Debra Awalt

Awalt stated there were no updates at this time.

Subcommittee Updates

Josiah Berry stated the **Subcommittee Transcript** will be having a subject matter expert (SME) attend their Aug. 10, 2017, meeting. During the subcommittee's last meeting, they discussed the draft version of FAQ. There were some edits that needed to be done. Berry is in the process on completed the edits. An update will be presented at the next full committee meeting.

Subcommittee 2

Billups stated the Online Services Subcommittee had their meeting last week. It was decided to move forward after speaking with the SME. There was a review of some links to IRS.gov that may need to be renamed in order to generate interest. There were some links sufficient and no changes were needed. Additional information should be shared regarding the information to be obtained when accessing each link to help taxpayers. The subcommittee was tasked with coming up with ways to increase the usage of the various Online Services offered. The team is focusing on several news links and ways to get information out to the public. There was a discussion on whether certain information is properly located on IRS.gov to be easily accessible.

Scott Wallace will resend the links and the suggested changes to the team.

Outreach Report

Holly Hoffman encouraged members to reach out if they have any questions.

Action Items:

Lisa Billups stated there are a few action items:

- Post Minutes to www.TAPSpace.org with changes
- Update to show Issues 36113, 35473 and 33693 as Dropped
- Update to show Issue 35423 will become active and assigned to the Transcripts subcommittee; Billups will research the topic and if needed arrange for a SME come and speak on this issue
- Members should review TAC Manager Survey responses on www.TAPSpace.org

Christensen added if any member would like to have something brought up during the JC's meeting in August they should let him or Holly Hoffman know and they will make sure to address it during their meeting.

Jimerson stated they were able to get the new system administrator for the Facebook page. Any members on Facebook are encouraged to join TAP's



Facebook page to receive information. Thank you extended to everyone for being on the call.

Closing

Susan Jimerson closed the meeting.

Next Meeting: Aug. 15, 2017 at Noon PST



**Taxpayer Assistance Center (TAC) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
June 20, 2017**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer

Attendance

- | | | |
|------------------------------|-------------------------|------------|
| • Michelle Brookens | Taylorville, IL | Member |
| • Richard “Kent” Christensen | Boise, ID | Member |
| • Tasheka Dorsey | Darrow, LA | Member |
| • Joseph Holley | Barboursville, WV | Member |
| • Gary Hoff | Hot Springs Village, AR | Member |
| • Holly Hoffman | Amherst, WI | Chair |
| • Felicia Horton | Lexington, KY | Member |
| • Manny Illickal | Syosset, NY | Member |
| • David Jones | Hickory Creek, TX | Vice Chair |
| • Scott Wallace | Zephyr Cove, NV | Member |

Members Absent

- Josiah Berry Greenwood, IN Member

Staff

- Sheila Andrews, TAP Director
- Javier Hernandez, Acting TAP Director
- Susan Jimerson, Designated Federal Officer
- Lisa Billups, Senior Program Analyst
- Antoinette “Toni” Ross, Program Analyst
- Gilbert Martinez, TAP Analyst
- Stephanie Harrison-Colbert, SBSE
- Sheila Stevens Brown, W&I
- Lashaun King
- Beth Braddock, W&I
- Frances Flore, W&I
- Tamikio Bohler
- Cindy R. Jones
- Betty Scott
- Johnnie Beale
- Rosemary Rixey
- Debra Awalt
- Annie Gold, TAP Administrative Assistant



Member of Public

None

Roll Call

Quorum was met

Opening/Welcome

Susan Jimerson welcomed everyone to the meeting and provided an overview of the agenda. The interviews for the new members and alternates are going well. The interviews, review and selections are expected to be completed by the end of October. The IRS Tax Forums will begin next month. The first one will be held in Orlando, Florida, July 11, 2017. Members located near the forums have already been contacted for participation. The Internal Communications Committee call was held last week. They are working on a couple of issues and the TAP newsletter will be issued by the end of June. A solicitation has been sent for articles with a due date of the fifth of each month; a few articles have been received. The articles should be provided to the chair to forward to Internal Communications. There is a TAP Facebook page; currently work is being done to get TAP's two system administrators profiled for the page. A solicitation will be going out soon for any member who is already on Facebook to join the TAP Facebook page.

National Office Report – Sheila Andrews/Javier Hernandez

Andrews welcomed everyone to the call. She expressed her thank you to all members for all of the work being done and the assistance with the interview process. This is a very busy month with the interviews for the new members and alternates. It is a very critical part of the process and having members on board who have volunteered to assist with the interview process is appreciated.

Chair Report – Holly Hoffman

Hoffman thanked the committee for all of the hard work and member contributions with the interviews and outreach. It is very important in keeping TAP going forward. She encouraged members to be in contact with the Local Taxpayer Advocates. This is another important part of the process. Members were reminded to make sure to complete their assignments. This will prevent falling behind. If there is a problem in getting assignments completed, members should notify the chair.

Public Input

None

Approval of Minutes

May 16, 2017 minutes approved as amended.



Program Owner Report – Debra Awalt

Debra Awalt stated there were no updates at this time.

Subcommittee Updates

Hoffman stated the **Transcript Subcommittee** had discussed during their last meeting the progress on their referral; members are working on the FAQs for the universities. One of their tasks was to log on and get their transcripts online. Subject Matter Expert (SME), Paul White from IRS attended the meeting and discussed the authentication process and what steps people go through to access their account. It was really interesting. All Federal Agencies are required to use the authentication process, not just IRS. There is an attempt to make the system user friendly but there are security requirements that must be followed.

There is an authentication risk assessment process that must be done. There needs to be secure access on the cell phones and have to be tied to a home phone account under the person's name. White will look into the language to be clear of the indicators. They are also looking into whether or not there is clearance for the activation code by a cell phone text. Or should the code be sent via email or some other means. Due to security issues, the code cannot be sent via email. It was understood that every time a call comes in from the same cell phone the person would need to go through the authentication process again. They also discussed the issue of the transcripts not being available online. Joseph Holley stated there have been no successful attempts in getting transcripts online. There were complaints on how the transcript looked once it was received. Michelle Brookens added there was a delay in getting her transcript due to not being able to verify mortgage.

Manny Illickal shared how he requested his transcript by mail and received it in four to five days. It is possible to receive the transcript by fax. The two-step verification system is difficult to navigate through. Scott Wallace stated there is a tradeoff of higher level of security and authentication process. If you do not have a cell phone in your own name you will not get a transcript. The two-step process is also being done in the private sector. A suggestion was made to help users be better prepared when requesting transcripts online. Bohler stated there is information online listing items needed in order to request a transcript. She shared several items needed and that the system requires before it allows access. It also states if there is a credit freeze on the person account, the freeze would need to be lifted before a transcript would be provide. Awalt suggested encouraging Taxpayers to retain a copy of their Tax Returns and this could eliminate the need for a transcript; however, this will not be proof it was filed and processed by IRS.

Subcommittee II

David Jones stated the **Building Awareness of IRS Online Services**

Subcommittee to Improve Online Access had their meeting. He mentioned how



Wallace had spoken on the authentication process and assignments were made to look at the different links. Jones mentioned IRS asked the committee to steer away from certain verbiage. Wallace added some of the links do not give enough information on what Direct Pay means. The average taxpayer may not know what it means. Nine of the 12 web links divided and assigned to committee members. They were given specific guidance from IRS to not do anything with *Where's My Refund* which is a successful link. More discussion will be held at the next subcommittee's meeting. A second issue came up on practitioners, how to improve online access. How they get readily available information for clients. Having a Power of Attorney (POA) is the only way a practitioner would be able to get the information on the taxpayer. Is there an expedited process for the practitioner to obtain information for a client? Debra Awalt stated there is no process. Work is still being done on getting third party access. POA must have a signature. If an original signature is not provided and notarized, no information will be provided or Tax Return will be done. Debra Awalt added information could be provided on the different POAs available. Tamikio Bohler suggested looking into how other agencies are addressing this issue.

Outreach Report

David Jones stated as of the end of May, the Activity Reports due May 25, 2017, still have four members who have not turned in their reports. The committee has completed 693 hours total volunteer work. Average out to 98 hours to date for 33 hours per month; 103 of the 693 hours are outreach hours done over 31 outreach events. The total audience reached was 5,673 people. With the seven members reports the average is 700 per month. The report has not gone to Sally Mullins Thompson; we are waiting on the other four members reports. Two members have committed to submitting their reports. Holly Hoffman reminded members how important it is to get the reports completed and turned in on time.

Action Items

Lisa Billups stated there are two action items:

- Post final approved May minutes to www.TAPSpace.org
- Follow-up on SME to speak with the full committee on the POA process to obtain taxpayer information

Jimerson thanked everyone for being on the call.

Closing

Susan Jimerson closed the meeting.

Next Meeting July18, 2017 at noon PST

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



**Taxpayer Assistance Center (TAC) Improvement Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
May 16, 2017**

Designated Federal Officer

- Javier Hernandez Designated Federal Officer

Attendance

- | | | |
|-----------------------|-------------------------|------------|
| • Josiah Berry | Greenwood, IN | Member |
| • Michelle Brookens | Taylorville, IL | Member |
| • Richard Christensen | Boise, ID | Member |
| • Tasheka Dorsey | Darrow, LA | Member |
| • Joseph Holley | Barboursville, WV | Member |
| • Gary Hoff | Hot Springs Village, AR | Member |
| • Holly Hoffman | Amherst, WI | Chair |
| • Felicia Horton | Lexington, KY | Member |
| • David Jones | Hickory Creek, TX | Vice Chair |
| • Scott Wallace | Zephyr Cove, NV | Member |

Members Absent

- | | | |
|------------------|-------------|--------|
| • Manny Illickal | Syosset, NY | Member |
| • Jon Lumbra | Holyoke, MA | Member |

Staff Present

- | | |
|------------------------|------------------------------|
| • Javier Hernandez | Acting TAP Director |
| • Sheila Andrews | TAP Director |
| • Lisa Billups | Senior Program Analyst |
| • Beth Braddock | Policy Analyst W&I |
| • Tamikio Bohler | Program Analyst W&I |
| • Johnnie Beale | Senior Tax Analyst &I |
| • Rosemary Rixey | Policy Analyst W&I |
| • Matthew Schimmel | Senior Audit Evaluator TIGTA |
| • Frank O'Connor | Auditor TIGTA |
| • Charles "Steve" Nall | Auditor TIGTA |

Member of Public

None

Opening/Welcome/Announcements

Javier Hernandez opened the call and reported that the business cards and the annual reports have been put in the mail and should be received shortly.

Roll Call



Quorum made.

DFO/National Office Report

Hernandez reported the recruitment process was in full swing. In addition, members will be requested to assist with interviews so if interested, please volunteer for this process.

Review Agenda

Holly Hoffman thanked David Jones for covering the last meeting and also reported that Jon Lumbra is no longer with TAP. Hoffman reviewed the committee goals, which are in conjunction with the IRS mission. Hoffman gave current projects and indicated that in reference to the IRS' Future State initiative, we are trying to assist taxpayers with utilizing technology and moving to online services allowing taxpayers to help themselves and go into TACs less.

Chair Report

Hoffman reported that changes to TACs such as reduction in personnel and the appointment only service have been implemented. Hoffman mentioned that assistance is still needed for taxpayers unable or unwilling to use automated services. Hoffman also indicated that the committee is working on helping colleges and universities verify or validate tax transcripts submitted by their students. Resolving issues like this will reduce traffic in TACs and allow taxpayers who visit a TAC to be able to receive faster service.

The survey was reviewed and the focus was the consistency of TAC hours of operation and how appointment exceptions were handled. After the research the following recommendations were made:

1. Provide appointment confirmations to taxpayers through the 800 numbers also providing pertinent information such as date; time; canceling options; documents required; and parking a facility specific information reminders to taxpayers.
2. Post the *Hate to Wait* pamphlet in TACs with the 800 appointment number on it.

Other positive feedback from the survey was this caused less traffic at the TACs; better customer service; improved employee morale; many customers assisted over the phone; and no overcrowded waiting rooms.

Obstacles received from the survey were customers unaware of account issues; customer don't understand what services they require; customer not having the documents needed for assistance; customers arrived late due to parking access or security protocol; and customers turned away by security.



Some issues identified by TAC managers were: better advertising of the 800 number; require or encouraged the 800 be contacted first to ensure all issues were identified and that the customer was scheduled for the appropriate assistance needed; ensure the customer had all needed documents; and ensure that customers are not turned away before speaking with IRS an employee. The survey questions and response are on www.tapspace.org under TAC 2016 Subcommittee 1 file. Other issues from the Face to Face meeting that were put into the Parking Lot were victims of ID Theft which require a visit to TACs, Tax Law questions not answered after filing season and cumbersome process for processing payments at TACs. These may be worked later.

Approve April 18, 2017 Minutes

Christensen motioned and Jones seconded; minutes accepted as presented.

Comments from the Public

None

Program Owner Report

None

Subcommittee Transcripts Report

Joe Berry reported that the subcommittee is working on questions and will be working with a Subject Matter Expert next month. The subcommittee members will also go online and get an e-copy of their own transcript as part of their research.

Subcommittee Online Services Report

David Jones reported that Scott Wallace ran the meeting last month. Scott Wallace spoke about the basic concept of their subcommittee, which is to get people out of the TAC and on to www.irs.gov for assistance. Approximately 84 percent of the country has access to the internet and they were our focus. Wallace reported that the IRS is supposed to be doing a major revamp of IRS.gov sometime in August so this should be kept in mind. One idea that is being researched is trying to make some of the links on www.irs.gov more user-friendly. The focus is to come up with better titles for links making it easier for taxpayers to resolve issues on the website without having to go into a TAC.

Some titles work well such as “Where’s My Refund and IRS2go mobile application” others need to be revisited for better user results.

Outreach Report

Jones reported that eight of the eleven committee members submitted their outreach reports. Jones spoke about a section that Sallie Mullins Thompson proposed having placed in the TAP newsletter called Spotlight on Success. Holly Hoffman received the award this month based on all of the outreach she has



completed both in person and with her online efforts. Hoff, Christensen, Brookens, and Jones all had several outreach events for the month. Jones reiterated the importance of submitting complete outreach reports so that these efforts can be known by the committee.

Wrap-Up-Action Items

Wallace asked what to do with mailers that were handed to him it was indicated they need to go to Lisa Billups. Wallace will send electronically. Billups will be rescheduling the Screening Committee meeting soon.

Closing

Hernandez thanked and praised the committee for their outreach efforts and officially closed the call.

**Next meeting: Tuesday June 20, 2017
3 p.m. ET; 2 p.m. CT; 1 p.m. MT; Noon PT; 9 a.m. HT**

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



**Taxpayer Assistance Center (TAC) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
April 18, 2017**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer

Attendance

- | | | |
|-----------------------|-------------------------|------------|
| • Josiah Berry | Greenwood, IN | Member |
| • Michelle Brookens | Taylorville, IL | Member |
| • Tasheka Dorsey | Darrow, LA | Member |
| • Richard Christensen | Boise, ID | Member |
| • Joseph Holley | Barboursville, WV | Member |
| • Gary Hoff | Hot Springs Village, AR | Member |
| • Felicia Horton | Lexington, KY | Member |
| • David Jones | Hickory Creek, TX | Vice Chair |
| • Scott Wallace | Zephyr Cove, NV | Member |

Members Absent

- | | | |
|------------------|-------------|--------|
| • Holly Hoffman | Amherst, WI | Chair |
| • Manny Illickal | Syosset, NY | Member |
| • Jon Lumbra | Holyoke, MA | Member |

Staff

- Javier Hernandez, Acting TAP Director
- Susan Jimerson, Designated Federal Officer
- Lisa Billups, Senior Program Analyst
- Antoinette Ross, Program Analyst
- Gilbert Martinez, TAP Analyst
- Stephanie Harrison-Colbert, SBSE
- Sheila Stevens Brown, W&I
- Lashaun King
- Beth Braddock, W&I
- Frances Flore, W&I
- Tamikio Bohler
- Cindy R. Jones
- Betty Scott
- Johnnie Beale
- Rosemary Rixey
- Debbie Awalt
- Annie Gold, TAP Administrative Assistant



Member of Public

None

Roll Call

Annie Gold

Quorum was met.

Opening/Welcome

Susan Jimerson welcomed everyone to the meeting and reviewed the agenda. Sheila Andrews will not be attending the call today. There will be an outreach meeting led by TAP Vice Chair, Sallie Mullins Thompson on April 27, 2017. Calendar invites have been sent to the committee vice chairs and to members assisting with the Outreach Committee. An invite has been sent out to the members who volunteered for the Internal Communications Committee. The meeting is scheduled for the first week of May.

We are accepting applications for the TAP through April 24, 2017, the applications will be ranked and applicants selected for interview. There will be a solicitation for volunteers to assist with the interviews. All new and returning members are encouraged to participate in the process; it will provide program insight and should be a lot of fun. Members are encouraged to volunteer for one or more interview sessions.

Antoinette Ross, TAP West Analyst, will back up Lisa Billups during the TAC full committee calls. Gilbert Martinez has joined TAP as one of TAP West Analysts. He will be working with the Outreach and Internal Communication Committees. He is attending today's call.

National Office Report – Sheila Andrews/Javier Hernandez

Javier Hernandez welcomed everyone to the call. He informed the committee there is a TAP Activity Report User Guide the TAP Staff is working on and it will be very useful especially for new members.

Chair Report – Holly Hoffman

David Jones, vice chair welcomed everyone to the call. He stated the Outreach Committee is made up of TAP vice chairs from the six project committees. Their first meeting will be held April 27, 2017. The two subcommittees will have their subcommittee reports shortly. The subcommittees met on April 12, 2017. He stressed the importance of the subcommittee meetings. The meetings allow members voices to be heard and for them to have input. Lisa Billups sent out a list of Local Taxpayer Advocates (LTAs). If members have not had the opportunity to reach out to them, please do so.

Public Input



None

Approval of Minutes

March 23-24, 2017, face-to-face minutes approved with two minor corrections (David Jones title to be corrected from vice member to vice chair).

IRS Response to Issue:

Issue 33415 – Sustainability of the VITA Site: Lisa Billups sent information out on this issue along with copy of the referral as written and submitted to the IRS. In the body of the referral there were three recommendations made on last year by TAC. A response was received back from the IRS.

1. Revision of the Revenue Manual.
2. Training
3. Support

Recommendations 1 and 2 were accepted, but 3 was partially accepted.

Discussion on the responses was held by the committee. The question was asked on why there is an issue with budget funding for the VITA program. Johnnie Beale added the biggest challenge they have is in regards to the budget is there is not a full year of funding allocated to the agency. Questions were discussed on the VITA program getting training literature, support by SPECs, software use in preparing tax returns, mileage reimbursements and additional funding. Susan Jimerson added the discussion may help in a different type of referral. Different facts would need to be brought to the table to do a different type of referral. Richard Christensen presented his recommendation to accept the partial acceptance provided by IRS.

Decision: Consensus by the Full Committee to accept the partial recommendation provided by IRS

New Activity Report

Lisa Billups stated the 2017 Activity Report has not changed. It is still due by the 25th of each month. Send the report to the TAP mailbox

Taxpayeradvocacypanel@irs.gov and a copy to David Jones and Lisa Billups.

She will send a reminder to each member of the due date for the report.

Jimerson reminded the members to look at the Activity Report User Guide once it becomes available. Lisa Billups is available for any questions when completing the report.

Subcommittee Updates

Josiah Berry stated the Subcommittee Transcript has the draft referral ready and they are working on the proposed transcript FAQ attachment to go along with it. They are working on coming up with questions and answers to be included in the document. They are also looking into another project that involves transcripts.



There is an online system up and running. It seems too secure. They are looking into having a Subject Matter Expert (SME) to join their meeting in the near future for discussion.

Subcommittee Two

David Jones stated the first subcommittee meeting was held on April 13, 2017. Several people from IRS including a SME attended the call. Howard Brooks spoke about TAS marketing program. There are IRS employees that track taxpayers generationally and try to keep up with what's trending on social media.

IRS has requested TAC assist with identifying ways to encourage and build awareness of online services. The subcommittee needed to identify barriers and make recommendations. The name changed from building awareness to improving awareness. The subcommittee agreed to look at the ten links that were provided. They will research the links to find out the difficulties impacting ease of use and possibly come up with ways to change the names of some of the links.

Referral 35292 to improve the appointment process with confirmation notices. This was rejected by IRS. The appointment scheduling tool does not have an option to issue an automatic confirmation. The recommendation is under consideration for when funding is available to enhance current systems.

Decision: IRS response was accepted

Debbie Awalt stated they are in the process of revamping the www.IRS.Gov website. It should roll out in September. The specific links the subcommittee was asked to look at: IRS Help & Resources, My RA, Pay with Cash at a retail partner, services provided, let us help you, where's my refund, welcome to get a transcript, trucking tax center, new cash payment option, tools. Not all are easily accessible through www.IRS.gov without a lot of knowledge of where to find it. Awalt said data on number of accesses is available but she was not sure how far it goes back. Send requests to Tamikio Bohler and she will get the information requested. Scott Wallace added the subcommittee is trying to take the 10 links and come up with names for them to increase the number of clicks. The idea is to suggest names for IRS consideration that would make it easier for the public to understand what that link is to. The team would like to come up with better marketing names for some of the links to encourage use. Johnnie Beale shared the meaning of the acronym CAREFA (Customer Assistance Relationships and Education, Field Assistance). It is the overall system in part to W&I division which the Field Assistance Director, the Media and Public Relations and the Spec. Director falls under. Field Assistant oversees the walk-in of the TAC offices.

Action Items:



Lisa Billups stated one action item is to obtain statistics for the usage of the various links provided. David Jones stated it would be interesting. The committee agreed to do an aging report or life cycling analysis could be done on it.

Susan Jimerson thanked everyone for being on the call.

Closing

Susan Jimerson closed the meeting.

Next Meeting: May 15, 2017 at noon PST

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



**Taxpayer Assistance Center (TAC) Project Committee
Taxpayer Advocacy Panel (TAP)
Face-to-Face Meeting Minutes
March 23 – 24, 2017
Thursday, March 23, 2017**

Designated Federal Officer

- Susan Jimerson Chief, TAP West

Attendance

- Josiah Berry Member
- Michelle Brookens Member
- Richard (Kent) Christensen Member
- Tasheka Dorsey Member
- Gary Hoff Member
- Holly Hoffman Chair
- Felicia Horton Member
- Manoj (Manny) Illickal Member
- David Jones Vice Chair
- Scott Wallace Member

Members Absent

- Joseph Holley Member
- Jon Lumbra Member

Staff

- Lisa Billups Senior Program Analyst
- Matthew O'Sullivan Program Analyst
- Kim Vinci Senior Program Analyst

Member of Public

None

Opening/Welcome/Announcements

Jimerson welcomed everyone to the meeting and reviewed the agenda. After roll call, the staff was introduced; member introductions followed.

Standard meeting ground rules were shared; these ground rules are shown at the bottom of the monthly meeting agenda. Everyone was encouraged to use proper phone and email etiquette when meeting virtually. Formal minutes will be taken during the full committee meetings and will be approved during the next meeting. Approved minutes will be posted to www.TAPSpace.org. Agendas and pre reads will be provided ahead of the full committee meeting and will be posted to www.TAPSpace.org. Those who do not have access to www.TAPSpace.org



were identified. Calendar invites will be sent with recurring meeting dates and times.

Prior to Chair elections, information was shared regarding the roles and responsibilities of the Chair and Vice Chair. The Chair will make sure meetings stay focused; progress is made with recommendations, and will report the committee’s activities monthly to the Joint Committee. The Vice Chair will support the Chair and step in as needed. The Vice Chair will also serve as the committee representative on the outreach committee.

Holly Hoffman was elected Chair and David Jones Vice Chair. The meeting was turned over to Holly to Chair the remainder of the meeting. The minutes for the November 9, 2016 meeting were reviewed and approved subject to minor changes. Quorum and consensus was discussed.

Meeting Dates

- Full Committee meetings will be held the third Tuesday each month at 3 p.m. ET.
- Subcommittee meeting (*Transcripts*) will be held the second Thursday each month at 1 p.m. ET
- Subcommittee meeting (*Confirmation Message*) will be held the second Thursday each month at 2 p.m. ET

Establishment of miscellaneous subcommittees

Screening: Manny Illickal, Scott Wallace, Tasheka Dorsey, Gary Hoff
 Quality: Joe Berry, Michelle Brookens
 Internal Communications: Michelle Brookens, Joseph Holley
 Outreach: David Jones

Establishment of Project subcommittees

Subcommittee *Transcripts*: Manny Illickal, Michelle Brookens, Josiah Berry, Holly Hoffman, Joseph Holley
 Subcommittee *Confirmation Message*: David Jones, Scott Wallace, Tasheka Dorsey, Felicia Horton, Jon Lumbra, Holly Hoffman, Kent Christensen

2017 Project Focus Review

<p>Online Services</p>	<p>There are several service options available where taxpayers can get assistance at their convenience and save time and travel associated with coming into TACs. These options include Get Transcript Online, Direct Pay, PayNearMe, and Online Payment Agreement (OPA).</p>	<p><i>Field Assistance requests the TAP Committee to:</i> - Encourage and build awareness about the availability of online services - Identify barriers to use online tools, such as Get Transcript, Direct Pay, and Online Payment Agreement.</p>
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		- Make recommendations to increase use of online tools
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Beth Braddock and Ginger Miller provided an overview of the various online services available to taxpayers. These services include the below:

- IRS Help & Resources – <https://www.irs.gov/help-resources>
- myRA – <https://www.irs.gov/help-resources>
- Pay with Cash at a Retail Partner – <https://www.irs.gov/payments/pay-with-cash-at-a-retail-partner>
- Services Provided – <https://www.irs.gov/uac/services-provided-four>
- Let Us Help You – <https://www.irs.gov/help-resources/telephone-assistance>
- Where's My Refund – <https://www.irs.gov/refunds>
- Welcome to Get a Transcript – <https://www.irs.gov/individuals/get-transcript>
- Trucking Tax Center – <https://www.irs.gov/businesses/small-businesses-self-employed/trucking-tax-center>
- New Cash Payment Option – <https://www.irs.gov/uac/newsroom/irs-offers-new-cash-payment-option>
- Tools – <https://www.irs.gov/help-resources/tools>

Tamara Birts, a Collection Technical Analyst with Systemic Advocacy (SA), provided a briefing to the committee on how SA works. She explained how the SAMS system works and how they prioritize issues. There is an ongoing project concerning TAC services and appointment requirements. One of the items of concern is that in many TACs the security guards appear to be the ones screening taxpayers.

Subcommittees for each Project Focus and other issue(s)

Assignments were given out to each subcommittee according to issues screened. New Issues since last meeting were screened and the following action taken:

Screening report dated March 5, 2017:

Disposition

35334	Concerns about the CP 2000 process	Closed
35379	Refund Inquiry	Closed
35388	Tax law question	Closed
35621	Submitting tax questions online	Closed
33229	Concerns about online security breaches	Closed
21121	Software options for VITA program	Closed
35423/35473	Victims of ID theft and authentication process require visit to TAC	Parking lot
29729	Concerns about tax law questions no longer being	Parking lot



	answered after filing season	
33693	Cumbersome process for processing payments at TACS	Parking lot

Members were assigned to subcommittees as follows:

- Sub Committee *Confirmation message*: Issue 35292, Project Focus (Online services)
- Sub Committee *Transcripts*: Issue 34028

The subcommittees met to begin discussions of the issues assigned to each committee



**Taxpayer Assistance Center (TAC) Project Committee
Taxpayer Advocacy Panel (TAP)
Face-to-Face Meeting Minutes
March 23 – 24, 2017
Friday, March 24, 2017**

Designated Federal Officer

- Susan Jimerson Chief, TAP West

Attendance

- Josiah Berry Member
- Michelle Brookens Member
- Richard (Kent) Christensen Member
- Tasheka Dorsey Member
- Gary Hoff Member
- Holly Hoffman Chair
- Felicia Horton Member
- Manoj (Manny) Illickal Member
- David Jones Vice Chair
- Scott Wallace Member

Members Absent

- Joseph Holley Member
- Jon Lumbra Member

Staff

- Lisa Billups Senior Program Analyst
- Matthew O'Sullivan Program Analyst
- Kim Vinci Senior Program Analyst

Member of Public

None

Opening/Welcome/Announcements

Jimerson welcomed everyone to the meeting and reviewed the agenda.

Taxpayer Assistance Center tour

Members visited the Albuquerque TAC and spoke with the TAC Manager about various TAC procedures and processes, customer service, Walk-ins, Appointments, and cancellations.

Project Subcommittee Report Out

Sub Committee Confirmation message – David Jones



Members: Jones, Wallace, Dorsey, Horton, Hoffman, Christensen.

The committee addressed whether it is advisable to pursue with IRS to implement something in the interim while waiting for completion of IT upgrades. It was decided to accept IRS response to Issue 35292 as TAC *“Planted the Seed”* at some point in the future IRS may adopt when they consolidate their Case Management Systems into one and/or improve the ability of their technology to handle this referral.

IRS has tasked TAC with building awareness of the various online tools available to taxpayers and to direct taxpayers to these tools verses visiting TACs. A discussion was held regarding ways to get the word out. IRS has targeted tax professionals, no particular outreach to non-tax professionals. The title IRS2GO (mobile application) was discussed as not an ideal title to generate interest from the public.

Action Item: Secure speaker from IRS/State liaisons to discuss how IRS partners with state agencies to distribute information to the public. Secure speaker from C&L who can share various avenues to reach the masses with information about IRS online services.

Sub Committee Transcripts/Chair Josiah Berry

Members: Josiah, Gary, Michelle, Manny

Issue 34028

Suggest IRS post sample of valid transcripts to www.IRS.gov. As research is being done on this matter, it may be possible that other issues may be uncovered that could generate other projects. Also considered was generating a set of Frequently Asked Questions (FAQs) that could be posted to the IRS web site; will need to review the FAQs that are already there. The goal is to have this done by April 9, 2017.

This new set of FAQs would be geared more toward the needs of universities and financial aid offices that use the transcripts. Need to determine how many people or institutions have concerns about the verification issues involved in getting transcripts. This may relate to ID theft issues.

Meeting Assessment/Next Steps

Recurring meetings (full and subcommittee) have been established; members are currently working on pending items. Group emails will include all subcommittee members, Billups, Ross and Jimerson.

Action Item: Secure Subject Matter Expert to discuss IRS future state with full committee.



Closing

Jimerson adjourned the meeting.

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