



**2015 Meeting Minutes
Taxpayer Assistance Center (TAC) Project Committee**

- November 12, 2015
 - October 14, 2015
 - September 9, 2015
 - August 12, 2015
 - July 8, 2015
 - June 10, 2015
 - May 13, 2015
 - April 8, 2015
 - March 11, 2015
 - February 11, 2015
 - January 15-16, 2015
-

**Taxpayer Assistance Center (TAC) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
November 12, 2015**

IRS Staff

- Amy Albee – Supervisor, W&I
- Sheila Andrews – TAP Director
- Rose A. Babb – Management Assistant, TAP
- Tamikio Bohler – Program Analyst, W&I
- Beth Braddock – Management & Program Analyst, W&I
- Sheila Stevens-Brown – Program Analyst, W&I
- Cedric Jeans – Designated Federal Office
- Annette Johnson – Program Analyst (Absent)
- Bill Metzger – Supervisor, TAS
- Beth Scott – Program Analyst, W&I
- Otis Simpson – Program Analyst, TAP
- Tina Younger – Supervisor, W & I

TAP Members

- Josiah Berry – Greenwood, IN
- Richard (Kent) Christensen – Boise, ID
- Allan Goldberg – Hunter, NY
- Francis Grinnan – Rochester, NY
- Alphonse Piard – Miami, FL (Absent)
- Robert Phillips – Dallas, TX



- David Thies – Alton, IL (Absent)
- Sallie Mullins-Thompson – New York, NY
- Mary Jo Thomson – Oklahoma City, OK,
- Pamela Trafford – Amherst, MA (Absent)
- Scott Wallace – Zephyr Cove, NV (Absent)

Welcome/Announcement

Jeans welcomed everyone and declared the meeting opened; this was the last official TAC meeting of 2015.

Roll Call

The minutes for October were approved for posting to www.improveirs.org.

DFO Report

Jeans thanked all the members and those rotating off the TAP for their hard work and dedication; he told the members that this has been a very productive year for the committee.

National Office Report

Andrews also mentioned the following:

- TAP is still preparing for the Face to Face Meeting, the TAC and the Toll Free committees will be held in Oklahoma City and the TFP in Albuquerque.
- Subsequent to this teleconference, there will be another teleconference “Meet the Candidates.”
- If returning members are interested in becoming mentors, or instructors, review the material sent via email and respond accordingly.
- If returning members wish to change their project committee, please respond to the email asking for first and second choices; if members wish to remain on the same committee that is fine.

Elevated Issues

Goldberg directed the members’ attention to the elevated issues for comments and members to vote on the issues. The committee voted to move the issues forward to the attorney adviser review and subsequent to the Joint Committee for the teleconference call on November 25, 2015.

Mullins – Thompson indicated that there were 2 Exhibits “A&B” submitted with the referral for Issue 33632 – *Wait time and other challenges for TAC Appointment Service Model*. Exhibit A is included in Page 8 but, B is a separate addendum added. The committee approved this issue to move forward.

Appointment Process



Albee informed the committee that the IRS has started rolling out the appointment process around the country – 20 Taxpayer Assistance Centers at a time until it is all rolled out.

Goldberg voiced his concerns that the IRS does not understand the demand by taxpayers to be serviced. Other concerns are that the tax practitioners are unable to get through on the practitioner priority line. Goldberg indicated that because taxpayers can't get through on the phone, this is the reason they come into the TACs. He suggested that if the IRS increases the phone service due to staffing cuts in the TACs, they will save money and still provide reasonable services. Albee stated that because there is a decrease in staff services, the IRS staff tries to avoid sending taxpayers into the TACs when they call the toll free lines to discuss issues.

Cash Payments

Albee stated that the TACs cannot accept cash because of the cost to staffing; this would require three or more employees along with security. This issue will have to be reviewed by the Director of Field Assistance. There are 86 TACs that accept cash; payments via kiosk have been tested and the cost is prohibitive. Albee also stated that there is no cross training to accept cash since there is a designated person that has the receipt book.

Subcommittee VSD – 1

Thomson mentioned that members should be prepared to ask questions on the elevated issues during the Face to Face meeting in January 2016.

Subcommittee – 2

Christensen stated that there is a lot of work to be done at the face to face meeting; he recommends that mentors should get to know their mentees during the Face to Face meeting in January 2016.

Activity Report

Francis mentioned that the past 3 years have been very interesting, very nice people.

Action:

Annual survey will be sent via email next week to all the members to make improvements to the program this survey will be opened until 12/20/15.

Public Participation

There were no members from the public on the call.

Closing Comments

- Andrews thanked all the members for their work this year; she also thanked rotating off members - Goldberg for his leadership, Phillips, Thomson and Piard for their service on the committee.



- Simpson thanked all the members and IRS Staff for their service on the committee. He asked the members for their suggestions going forward to improve customer service in the TACs.
- Bohler thanked all the volunteers and TAP Staff.
- Jeans thanked the IRS Staff and all the members for their service.
- Goldberg expressed his appreciation to all the members for the great job they did with the committee work.

Closing

Goldberg and Jeans closed the meeting; this is the last meeting for 2015. The TAP Face to Face Meeting is scheduled for the week of January 11, 2016 the dates and times for the 2016 teleconference meetings will be announced at the face to face meeting.

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

**Taxpayer Assistance Center (TAC) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
October 14, 2015**

IRS Staff

- Amy Albee – Supervisor, W&I (Absent)
- Sheila Andrews – TAP Director
- Rose A. Babb – Management Assistant, TAP
- Tamikio Bohler – Program Analyst, W&I (Absent)
- Beth Braddock – Management & Program Analyst, W&I
- Sheila Stevens-Brown – Program Analyst, W&I (Absent)
- Cedric Jeans – Designated Federal Office (Absent)
- Annette Johnson – Program Analyst (Absent)
- Bill Metzger – Supervisor, TAS
- Beth Scott – Program Analyst, W&I (Absent)
- Otis Simpson – Program Analyst, TAP (Absent)
- Tina Younger – Supervisor, W & I

TAP Members

- Josiah Berry – Greenwood, IN (Absent)
- Richard (Kent) Christensen – Boise, ID
- Allan Goldberg – Hunter, NY
- Francis Grinnan – Rochester, NY
- Alphonse Piard – Miami, FL (Absent)
- Robert Phillips – Dallas, TX
- David Thies – Alton, IL (Absent)
- Sallie Mullins-Thompson – New York, NY
- Mary Jo Thomson – Oklahoma City, OK,
- Pamela Trafford – Amherst, MA
- Scott Wallace – Zephyr Cove, NV (Absent)

Welcome/Announcements

Andrews was the DFO for this meeting, she welcomed everyone and declared the meeting opened.

Chair Comments

Goldberg welcomed everyone and proceeded with the agenda for the call. He stated to the members that they are approaching the end of the TAP year; November is the last meeting of the year. He reflected on the contributions the panel members have made with regard to how the IRS process works. Goldberg also informed the committee members that within the next few weeks, they will be contacted by TAP Staff to consider taking on some leadership roles such as Chair and Vice Chair positions for 2016.

Roll Call & Approval of Minutes

Quorum was met for this meeting. The minutes for September were approved with one minor change for posting to www.improveirs.org.

National Office Report

Andrews mentioned that TAP is proceeding on with the annual project committee meetings the week of January 2016. She indicated although there are continued resolution issues, TAP is preparing for those meetings. If staff needs any additional help or resources to complete their task, Andrews asked the members to contact the TAP Staff.

Andrews informed the members that they will be contacted by TAP Staff to select what committees they wish to participate in for 2016; she indicated that TAP Staff tries to accommodate first and second choices however; this may not always be the case. Those members that wish to remain on the same committee are always welcome to do so.

Elevated Issues

Issue 33489 – Hate to Wait/Save time without the lines Publication – this referral has been approved and is now going forward to the Joint Committee (JC). Some minor edits will be made by Christensen prior to sending forward to Simpson and Singleton.

Volunteer Income Tax Assistance (VITA) Pilot C Report

Younger introduced herself and provided an overview on the VITA Pilot C Program. She mentioned that the Pilot was created to determine the effectiveness of the sites and being in compliance. Some members had specific questions for Younger; she will research and provide some feedback to Simpson.

Action Item(s) (Pilot C Program)

1. If a taxpayer has \$25,000 in expenses, do they use the safe-harbor method or long form?
2. If a taxpayer comes in with tools, does VITA perform 179 depreciation with them?
3. How many of the volunteers at the pilot sites were legacy professionals (enrolled agents, CPAs, etc.)? Is it possible for them to prepare Schedule C pilot returns only?
4. Ask CFED if they can share a copy of the training and test with TAP.
5. Is the American Institute of CPA a partner? Would they have been interested in "owning" the pilot?

Subcommittee 1 – Report

Thomson stated that her subcommittee is energized; they are preparing to send forward "Hate to Wait" to the JC. Thomson's subcommittee continues to work on issues.

Subcommittee 2 – Report

Christensen stated that one of his referrals have been approved by the JC; he mentioned that his subcommittee needs to revisit some more referrals for consideration. This may be done at the next and last teleconference of the year in November. Christensen thanked Goldberg for his assistance.

Activity Report

Grinnan reported that 4 out of the 11 members did not turn in activity reports for September. Grinnan send out an email to those individuals that have not submitted any reports.

Public Participation

There were no members from the public on the call.

Round Table

Next meeting is on a holiday – Veterans Day. The meeting has to be rescheduled for another date.

Action Item(s)

Grinnan will follow-up with a few committee members that have not submitted outreach reports recently.

The next and last TAC Teleconference is scheduled for November 11, 2015, Veterans Day. TAP Staff is working on moving the date to Thursday, November 12, 2015, at the same time; members will be informed when this new date is confirmed via email.

Closing

Goldberg and Andrews closed the meeting and thanked everyone for attending.

Next meeting: Members will be informed via email; TAP Staff is working on moving this date to Thursday, 12, 2015, 3 p.m. EST

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

**Taxpayer Assistance Center (TAC) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
September 9, 2015**

IRS Staff

- Amy Albee – Supervisor, W&I (Absent)
- Sheila Andrews – TAP Director
- Rose A. Babb – Management Assistant, TAP
- Tamikio Bohler – Program Analyst, W&I
- Beth Braddock – Management & Program Analyst, W&I (Absent)
- Sheila Stevens-Brown – Program Analyst, W&I (Absent)
- Chris Duling – IRS Counsel
- Cedric Jeans – Designated Federal Office
- Annette Johnson – Program Analyst
- Linda Rivera – Program Analyst
- Bill Metzger – Supervisor, TAS
- Beth Scott – Program Analyst, W&I (Absent)
- Otis Simpson – Program Analyst, TAP (Absent)

TAP Members

- Josiah Berry – Greenwood, IN (Absent)
- Richard Christensen – Boise, ID
- Allan Goldberg – Hunter, NY
- Francis Grinnan – Rochester, NY
- Alphonse Piard – Miami, FL (Absent)
- Robert Phillips – Dallas, TX
- David Thies – Alton, IL
- Sallie Mullins-Thompson – New York, NY
- Mary Jo Thomson – Oklahoma City, OK,
- Pamela Trafford – Amherst, MA
- Scott Wallace – Zephyr Cove, NV

Welcome/Announcements

Jeans welcomed everyone and declared the meeting opened.

Chair Comments

Goldberg welcomed everyone and proceeded with the agenda for the call. He stated that next week he will be looking at some proposals for the TAC to work on for next year. Some areas of interest are the TAC walk in center issues.

Roll Call & Approval of Minutes

Quorum was met for this meeting. The minutes for August were approved for posting to www.improveirs.org.

National Office Report

Andrews thanked the members for the feedback they provided on the Affordable Care Act Calculator testing. An email will be sent to all TAP members this week to thank them for their valuable input.

Issue Discussion

Issue #33169 – (*Enhancing IRS Support for Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) Grant Programs*). Attorney Advisor Chris Duling joined the call to discuss the issue of matching funds to pay VITA preparers. He stated that if VITA tax return preparers are paid, they are not subject to penalties and so, this is not a viable option. Duling mentioned that there are other ways to compensate VITA preparers. One of the options mentioned is advanced training in income tax preparation

Issue #33415 Sustainability of VITA/TCE Sites

The full committee approves this proposal to move forward; except for some minor editing of the document. This proposal must now go to IRS attorney advisor team for approval.

Goldberg expressed his appreciation to Piard and Mullins-Thompson for their quality review of the proposal.

Subcommittee 1 Report (Virtual System Delivery – VSD Update)

Thomson stated that her subcommittee is still working on the three referrals. “Hate to Wait” is currently being worked on; Thomson’s subcommittee has received some additional information that will be included in the referral write up. Regarding the payment process, Thomson stated that some more work needs to be done to determine which TACs are accepting cash and which ones are not.

Wallace discussed Publication 5136; he is editing the publication to make it more user friendly for taxpayers that visit the TAC walk in centers. Wallace will have a final draft prepared for discussion at the next TAC Teleconference.

Subcommittee 2 Report (Tax Return Processing and VITA Update)

Christensen stated that his subcommittee is now working on ideas for a third referral. He indicated that his subcommittee is working on suggestions for expanding the scope of the VITA/TCE programs to better serve the under-served taxpayer population. This subcommittee hopes to have a draft of this referral ready before the new TAP year.

Activity Report

Jeans reported that for the month of August, there were a total of four outreach events four issues were received with an audience of 275. Three members did not submit any reports for the month of August. Grinnan will reach out to those members who did not submit any reports.

Public Participation

There were no members from the public on the call.

Round Table

Wallace discussed his concerns on the IRS \$346 Million reduction in services. He asked the committee and staff if the committee should focus on those referrals that cost money or those that may not incur any cost to implement. Wallace also directed his question to those senior TAC members for feedback.

Metzger indicated that the budget reduction does start a conversation that gets attention on how to allocate resources for taxpayers and employees.

Action Item(s)

Grinnan will follow-up with a few committee members that have not submitted outreach reports recently.

Closing

Goldberg and Jeans closed the meeting and thanked everyone for attending.

Next meeting: Wednesday, October 14, 2015, 3 p.m. EST

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

**Taxpayer Assistance Center (TAC) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
August 12, 2015**

IRS Staff

- Amy Albee – Supervisor, W&I (Absent)
- Sheila Andrews – TAP Director
- Rose A. Babb – Management Assistant, TAP
- Tamikio Bohler – Program Analyst, W&I
- Beth Braddock – Management & Program Analyst, W&I (Absent)
- Sheila Stevens-Brown – Program Analyst, W&I (Absent)
- Cedric Jeans – Designated Federal Office
- Beth Scott – Program Analyst, W&I (Absent)
- Bill Metzger – Supervisor, TAS
- Otis Simpson – Program Analyst, TAP

TAP Members

- Josiah Berry – Greenwood, IN (Absent)
- Richard Christensen – Boise, ID
- David Donathan – Springfield, KY (Resigned)
- Allan Goldberg – Hunter, NY
- Francis Grinnan – Rochester, NY
- Alphonse Piard – Miami, FL
- Robert Phillips – Dallas, TX
- David Thies – Alton, IL (Absent)
- Sallie Mullins-Thompson – New York, NY (Absent)
- Mary Jo Thomson – Oklahoma City, OK (Absent)
- Pamela Trafford – Amherst, MA (Absent)
- Scott Wallace – Zephyr Cove, NV

Welcome/Announcements

Jeans welcomed everyone and declared the meeting opened.

Chair Comments

Goldberg welcomed everyone and proceeded with the agenda for the call. He informed the members that he is putting together a draft of his thoughts on brainstorming for issues. Goldberg will send this draft to the full committee within the next two weeks to take a look and provide feedback.

Roll Call & Approval of Minutes

Quorum was met for this meeting. The minutes for July were approved for posting to www.improveirs.org.

National Office Report

Jeans reported for Andrews who later joined the call. He informed the members that the Joint Committee (JC) meeting in Jacksonville, Florida last week went on very well. Small Business Self Employment, Executive Director of Systemic Advocacy, Kim Stuart, Wage and Investments were in attendance. A lot of issues were worked along with discussions on new issues for projects in the new TAP year.

Jeans highlighted the tap year is winding down and that there are a few projects still to be completed. He asked the members to continue to work a little harder to get the referrals finished within the next few weeks. Jeans also indicated that it is possible to schedule extra subcommittee meetings to accomplish this task at hand.

Andrews thanked Goldberg for successfully representing the TAC Committee at the JC face to face.

Elevated Issues

Issue #33169 – (*Enhancing IRS Support for VITA/TCE Grant Programs*). Goldberg held a short discussion on this Issue that was approved by the JC and is now on its way to the IRS.

TAC Appointment Testing Update

Simpson shared the latest information on the appointment testing. Goldberg discussed several concerns he has about this service based on the latest information. He indicated that he waited 29 minutes to speak to a telephone assistor. He also indicated that the assistor stated that the IRS will provide appointment times and dates and is working on providing alternatives to taxpayers who cannot make payments on line. Goldberg also mentioned that he is concerned that there can be problems if taxpayers have circumstances that inhibit them from waiting for a transcript via mail. In addition, Goldberg also stated that there should be a system at the TAC walk in to accommodate those taxpayers. Wallace indicated that these issues can be resolved at the www.irs.gov without traveling to an IRS office.

Jeans provided the new appointment call in telephone number for taxpayers to call 1-844-545-5640

Metzger indicated that he visited TAC sites and saw taxpayers being helped without appointments; some were turned away. This is not an indictment of the IRS however; awareness needs to be provided to the public. The question was asked how efficient will the VSD be with the appointment testing.

Subcommittee 1 Report (VSD Update)

Wallace provided an update on the subcommittee project for Thomson. He stated that the subcommittee is working on three referrals:

1. Long wait times and unserved taxpayers.

2. “Hate to wait” referral concept was to provide alternatives to waiting in line will probably be modified for those being turned away who did not have an appointment.
3. Payment processing – still gathering research on cash/check payments.

Goldberg stated that Systemic Advocacy is looking at Long Wait Time Issues and that this committee will have a discussion with Tracey Quamie on the issue. Quamie learned from TAC managers that many TACs are opting not to accept cash; this is an issue that this TAC subcommittee may want to highlight. Goldberg stated that this means that taxpayers without any bank accounts are forced to pay fees to convert their cash to money orders.

Subcommittee 2 Report (Tax Return Processing and VITA Update)

Christensen’s subcommittee met on Monday and he sent a referral to the subcommittee for comments. (Metzger was referring to the VSD or kiosk in the TAC sites and how efficient will they be during the appointment testing period.) He received a response from Theis and he hopes to have it finalized for approval this month.

Goldberg stated that the subcommittee meeting was moved to August 19, 2015. He also stated that there are two referrals in the works, training and VITA.

Activity Report

Grinnan reported that for the month of July, there were few reports sent in to him and TAP staff. He mentioned that he sent four emails to those members that did not submit any reports. There were 7 events with and a total of 28 issues reported.

Public Participation

There were no members from the public on the call.

Round Table

Grinnan had a meeting with Stakeholder Partnerships, Education & Communication (SPEC).

Action Item(s)

Extra subcommittees may need to be scheduled to enable members to discuss and work on issues before the end of 2015.

Goldberg will send an email to the full committee on brainstorming issues asking for their suggestions/comments.

Closing

Goldberg and Jeans closed the meeting and thanked everyone for attending.

Next meeting: Wednesday, September 9, 2015, 3 p.m. EST

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

**Taxpayer Assistance Center (TAC) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
July 8, 2015**

IRS Staff

- Amy Albee – Supervisor, W&I (Absent)
- Sheila Andrews – TAP Director
- Rose A. Babb – Management Assistant, TAP
- Tamikio Bohler – Program Analyst, W&I
- Beth Braddock – Management & Program Analyst, W&I (Absent)
- Sheila Stevens-Brown – Program Analyst, W&I (Absent)
- Cedric Jeans – Designated Federal Office
- Beth Scott – Program Analyst, W&I (Absent)
- Bill Metzger – Supervisor, TAS
- Otis Simpson – Program Analyst, TAP

TAP Members

- Josiah Berry – Greenwood, IN (Absent)
- Richard Christensen – Boise, ID
- David Donathan – Springfield, KY
- Allan Goldberg – Hunter, NY
- Francis Grinnan – Rochester, NY
- Alphonse Piard – Miami, FL
- Robert Phillips – Dallas, TX
- David Thies – Alton, IL
- Sallie Mullins-Thompson – New York, NY (Absent)
- Mary Jo Thomson – Oklahoma City, OK
- Pamela Trafford – Amherst, MA
- Scott Wallace – Zephyr Cove, NV

Welcome/Announcements

Jeans welcomed everyone and declared the meeting opened.

Chair Comments

Goldberg welcomed everyone and proceeded with the agenda for the call. He informed the members that the National Taxpayer Advocate will be submitting her mid-year Report to Congress this month. This report contains the road map of goals and activities for the TAS/TAP in the coming year. Goldberg mentioned that the report will be available by late July or mid-August.

Roll Call & Approval of Minutes

Quorum was met for this meeting. The minutes for June were approved with a few minor edits before posting to www.improveirs.org.

National Office Report

Andrews stated that TAP is now wrapping up the interview process for new members. There are a series of approvals that the process must go through to bring the new members on board – the National Taxpayer Advocate and the Department of Treasury. The new members will be notified by October 2015.

Andrews mentioned to the members that Teresa Cook has returned to her business unit and that Annette Johnson has joined the TAP unit on a detail.

Elevated Issues

Goldberg stated that this issue revolves around asking the IRS to assist with grant partners by promoting the recruitment for the Volunteer Income Tax Assistance (VITA) programs. He stated that there are five recommendations within the proposal. Goldberg got some feedback – Thies stated that he likes the working and framing of the five recommendations. Trafford sent some information that could strengthen the program and Wallace asked what the compelling point to become a VITA recruit is. Goldberg stated that one of the recommendations addresses Wallace's question. Thomson asked about incentives in the program that would be helpful for students to indicate on their resumes.

Get It Transcripts Response

Goldberg led a brief discussion; he recalled in the last meeting that the committee would find interest in taking on the topic. Bohler mentioned that the Wage and Investment just sent the Get Transcript information back. Bohler will take Goldberg's question back to W&I for feedback. Phillips asked about the appointment testing and taxpayers still getting transcripts if they are only appointment based. Sheila suggested brainstorming some questions that may assist TAC with this issue. These questions will be submitted to Simpson and he will forward them to Bohler for answers.

Subcommittee 1 Report – VSD Update

Mary Jo Thomson stated that the VSD can be a challenge to get through; she also mentioned that she could not get through to speak to the TAC manager during the schedule time.

Goldberg stated that he sent out a one page Publication 5006 to the full committee. It is a bilingual one page form that addresses why taxpayers are waiting and why some taxpayers may be seen before others. Goldberg also mentioned that the committee may want to take a look at the publication to see what other helpful information can be added to assist taxpayers. Bohler will make inquiries to find out if this publication is still being used.

Goldberg mentioned that it would be beneficial to TAC for an expert to address the committee on the “Get it Transcript” pilot program. Simpson will work with Andrews to reach out to Charlene Cadro, of Taxpayer Advocate Service for assistance.

Subcommittee 2 Report (Tax Return Processing and VITA Update)

Christensen stated that his subcommittee will keep the two documents as separate and more forward with the IRS referral. The second referral will be split into two referrals; one on training and support and one on increasing the scope of VITA.

Activity Report

Grinnan reported that there were 20 events reported with a total of 26 issues.

Public Participation

There were no members from the public on the call.

Round Table

The discussion continued on the transcripts.

Andrews mentioned a pilot program on Schedule C Review will take place the week of August 10, 2015 through August 14, 2015. TAP is looking to put together a quality review team. This is just a review for quality and accuracy. If members are interested, please respond to the email with the details of this assignment as soon as possible. There will be overnight travel involved.

Goldberg will be attending the Joint Committee (JC) meeting in August, please communicate to him any issues you want to discuss at the JC meeting – including ideas for TAC projects in 2016.

Closing

Goldberg and Jeans closed the meeting and thanked everyone for attending.

Next meeting: Wednesday, August 12, 2015, 3 p.m. EST

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



**Taxpayer Assistance Center (TAC) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
June 10, 2015**

IRS Staff

- Amy Albee – Supervisor, W&I (Absent)
- Sheila Andrews – TAP Director (Absent)
- Rose A. Babb – Management Assistant, TAP
- Tamikio Bohler – Program Analyst, W&I
- Beth Braddock – Management & Program Analyst, W&I
- Sheila Stevens-Brown – Program Analyst, W&I
- Cedric Jeans – Designated Federal Office
- Beth Scott – Program Analyst, W&I (Absent)
- Bill Metzger – Supervisor, TAS
- Otis Simpson – Program Analyst, TAP

TAP Members

- Josiah Berry – Greenwood, IN
- Richard Christensen – Boise, ID
- David Donathan – Springfield, KY
- Allan Goldberg – Hunter, NY
- Francis Grinnan – Rochester, NY (Absent)
- Alphonse Piard – Miami, FL (Absent)
- Robert Phillips – Dallas, TX
- David Thies – Alton, IL
- Sallie Mullins Thompson – New York, NY
- Mary Jo Thomson – Oklahoma City, OK
- Pamela Trafford – Amherst, MA
- Scott Wallace – Zephyr Cove, NV

Welcome/Announcements

Jeans welcomed everyone and declared the meeting opened.

Chair Comments

Goldberg welcomed everyone and proceeded with the agenda for the call.

Roll Call & Approval of Minutes

Quorum was met for this meeting. The minutes for May were approved with two minor edits before posting to www.improveirs.org.

National Office Report

Jeans give the National Office Report for Andrews. He stated that TAP is in the interview phase for new applicants. Jeans thanked those that have volunteered to assist

with the interviews. He mentioned that TAP staff will send out another email soliciting assistance from those members that may not have gotten the previous email for assistance.

Jeans mentioned that the Joint Committee face to face meeting will be held in Jacksonville the week of August 3 – 8, 2015. If there are any members on the TAC committee that have concerns or need any assistance on issues they would like to present at that time, please reach out to your chair or the analyst of the committee.

Get It Transcripts Response

Goldberg lead a discussion on transcripts requested by taxpayers and the issue at hand now – the process has been shut down due to a security breach discovered by IRS last week. Serious concerns were expressed by the members some of them are:

- The TACs now has to substitute their staffing for the application process.
- Paragraph 2 refers to the email Otis Simpson received from Tamikio Bohler on June 8, 2015 in response to our request to review TAC employees guidelines currently in use during the period the software application Get Transcript is unavailable. There are two sentences in there that contradict one another about when providing IRS transcripts is appropriate at the time of the visit. Are there procedures in writing for the TAP Manager to follow?
- There should be written guidelines for the TAC manager to follow.
- Where can taxpayers go if they have an urgent need for transcripts?
- Does the IRS have a contingency plan for situations such as a security breaches and if so, how are they communicating or publishing contingencies to assist taxpayers?

It was noted that TAP staff will obtain additional information from W&I. It was agreed that subcommittee 1 would consider taking on a project to determine whether adequate procedures are in place to assist taxpayers with transcript requests at TACs during the interim period while the web application is unavailable.

Goldberg will do some research on the concerns expressed for procedures/guidelines at W&I.

Simpson will share a questionnaire used previously by Analyst Donna Powers – he indicated that the format and structure should mirror the sample he will provide.

TAP Membership Effectiveness

Goldberg discussed TAP leadership's admonition to members about the importance of their fulfilling responsibilities as members. Not all members are contributing equally leaving other members to shoulder much of the workload. Members were asked to rededicate themselves over the summer months to active participation so that they can fulfill their commitment to the citizens of their state to help improve the IRS.

Subcommittee 1 Report (VSD Update)

Mary Jo Thomson stated that the subcommittee is working five issues in one referral and the initial draft is in review. She hopes this will be finalized at the next full committee meeting in July. Additionally, a second referral, which the subcommittee was assigned by the IRS, is in progress. The overall project title and project statement have been agreed to and many good ideas for this referral have been submitted.

Subcommittee 2 Report

Christensen stated that his subcommittee is working on two drafts for Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE); Goldberg provided a draft for the full committee to review. Piard (Alternate Panel Member) is writing up some training support for volunteers. This will be combined into one recommendation.

Activity Report

Simpson reported for Grinnan; he stated that there has been a decline in the overall outreach activities. For the month of March and April, there was a spike however, for the month of May; there has been a 50 percent decline. Simpson discussed the various situations that can cause the decline in the activity reporting. He indicated that new members may need some additional guidance and is encouraged to reach out to their mentor. In addition, the members should reach out to the TAP staff. As a reminder Simpson mentioned that the TAP members are the constituent member of their home state.

Public Participation

There were no members from the public on the call.

Round Table

The discussion continued on the transcripts with other questions as well. Scott Wallace discussed his researching about TAC offering a plan of action for taxpayers to follow in the event the matter needs follow up after initial visit. Plans would be designed to prevent a repeat visit.

Closing

Goldberg and Jeans closed the meeting and thanked everyone for attending.

Next meeting: Wednesday, July 8, 2015, 3 p.m. EST

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

**Taxpayer Assistance Center (TAC) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
May 13, 2015**

IRS Staff

- Amy Albee – Supervisor, W&I
- Sheila Andrews – TAP Director
- Rose A. Babb – Management Assistant, TAP
- Tamikio Bohler – Program Analyst, W&I
- Sheila Stevens-Brown – Program Analyst, W&I
- Teresa Cook – Program Analyst
- Cindy Jones – Supervisor, W&I (Absent)
- Otis Simpson – Program Analyst, TAP
- Cedric Jeans – Designated Federal Officer
- Beth Braddock – Management & Program Analyst, W&I (Absent)
- Beth Scott – Program Analyst, W&I (Absent)

TAP Members

- Josiah Berry – Greenwood, IN
- Richard Christensen – Boise, ID
- David Donathan – Springfield, KY
- Allan Goldberg – Hunter, NY
- Francis Grinnan – Rochester, NY
- Robert Phillips – Dallas, TX (Absent)
- Alphonse Piard – Miami, FL (Absent)
- David Thies – Alton, IL
- Sallie Thompson – New York, NY
- Mary Jo Thomson – Oklahoma City, OK
- Pamela Trafford – Amherst, MA
- Scott Wallace – Zephyr Cove, NV

Welcome/Announcements

Jeans welcomed everyone and declared the meeting opened.

Chair Comments

Goldberg welcomed everyone and thanked the members for their work on the 2015 Care Review Publications. Goldberg stated that since the tax season is over, he is asking the members to speed up the process to avoid a back log on projects/recommendations and conducting outreach activities.

Roll Call & Approval of Minutes

Quorum was met for this meeting. The minutes for April were approved for posting to www.improveirs.org.

National Office Report

Andrews welcomed the members. She stated that the recruitment period has closed; there were 1,086 applications received. An email will be sent to all TAP members for solicitation of interview volunteers. Chairs will be asked to assist the staff by speaking to applicants that request information prior to their interviews. Andrews mentioned that subsequent to the interview process, the National Taxpayer Advocate, Nina Olson will be the next step. The final decision will be made by the Department of Treasury – this can be sometime in late October.

TAC Appointment Test

Amy Albee stated that the appointment period ended April 30, 2015. Wage and Investment are still processing the official results. However, feedback from taxpayers and staff has been positive. They tested one small, medium and large TAC facility. Out of the three of the TACs that were tested, only 1-800 service is looking at expanding this to the remaining 41 TACs.

Goldberg stated that the walk-in vs appointment process would lead to less taxpayers being served. He asked Albee if that is being considered in the decision process. Albee stated that the appointment process allows a TAC to spread out the appointments and that some walk-ins are not being serviced anyway. Albee stated that the appointment process seems to be efficient. Walk-ins are now considered same day appointments and that the public can still walk in and make payments. The 44 TACs are still continuing to make appointments. Albee indicated that she will contact Simpson when a decision has been reached on the process.

Issue Review

Goldberg indicated that he is pleased that the IRS has taken the time to review the recommendations and made a point by point response. He stated that TAP is limited in scope and so, he suggested that the differences in the decision be published in the TAP Annual Report.

Subcommittee 1 Report (Virtual System Delivery – VSD Update)

Thomson stated that her committee has reviewed some issues, on long wait time, and lack of paper forms. She stated that 1 out of 5 taxpayers are leaving the TACs without being served. This issue will be written up by her subcommittee and will send to the Internal Review. In addition, a project statement draft will be developed on the issue of some taxpayers who cannot handle the webpage and would rather come in person to the TACs some other issues being worked on are lack of paper forms.

Subcommittee 2 Report

Christensen settled on two issues for his subcommittee to work. He stated that he is looking at advertising or putting something on the webpage; two teams will be put together to work these issues.

Goldberg will discuss target dates for a draft on these issues at the subcommittee's June 15, 2015 meeting.

Activity Report

Grinnan reported that a few reports were missing for the month of April – overall, there were very few issues with submission of the spreadsheet. He provided a breakdown of the hours submitted by the TAC committee as well. There were 18 Outreach events with an audience of 110–11 issues were captured.

TAC Internal Communications Team

Goldberg asked for a volunteer to join Sallie Thompson on the committee. He asked if interested please contact him. Thompson made some brief comments on the work the committee is engaged in.

Public Participation

None

Round Table

Wallace and Berry requested some outreach material to conduct outreach with their Stakeholder Liaison. Babb stated that some material will be mailed overnight to both Wallace and Berry.

Wallace wants to know about the complexity of face to face issues of the TAC.

Andrews states that there have been numerous studies. The complexities are across the board. This appears to be generational. The younger generation is more “tech savvy” and, the older generation prefers face to face.

Andrews asked Bohler to provide an updated study and send it to Wallace.

Thies asks about the Annual face to face meeting dates for 2016.

Otis Simpson stated we will start regional committee work in June.

Closing

Goldberg and Jeans closed the meeting and thanked everyone for attending.

Next meeting: Wednesday, June 10, 2015, 3 p.m. EST

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

**Taxpayer Assistance Center (TAC) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
April 8, 2015**

IRS Staff

- Amy Albee – Supervisor, W&I
- Kay Alexander –
- Rose A. Babb – Management Assistant, TAP
- Tamikio Bohler – Program Analyst, W&I
- Sheila Stevens-Brown – Program Analyst, W&I (Absent)
- Cindy Jones – Supervisor, W&I (Absent)
- Otis Simpson – Program Analyst, TAP (Absent)
- Cedric Jeans – Designated Federal Officer
- Beth Braddock – Management & Program Analyst, W&I
- Beth Scott – Program Analyst, W&I (Absent)
- Linda Rivera – Management & Program Analyst

TAP Members

- Josiah Berry – Greenwood, IN
- Richard Christensen – Boise, ID
- David Donathan – Springfield, KY
- Allan Goldberg – Hunter, NY
- Francis Grinnan – Rochester, NY
- Robert Phillips – Dallas, TX
- Alphonse Piard – Miami, FL
- David Thies – Alton, IL
- Sallie Thompson – New York, NY
- Mary Jo Thomson – Oklahoma City, OK
- Pamela Trafford – Amherst, MA
- Scott Wallace – Zephyr Cove, NV

Welcome/Announcements

Jeans welcomed everyone and declared the meeting opened.

Chair Comments

Goldberg welcomed everyone to the teleconference meeting. He informed members that there is a live webcast hosted the Commissioner of the IRS, Nina Olson, the National Taxpayer Advocate and IRS Staff. The webcast topic is “How does the IRS budget cut affect the taxpayers and the tax system.” Members were asked to take a look at the webcast.

Roll Call & Approval of Minutes

Quorum was met for this meeting. The March minutes were approved for posting to www.improveirs.org with one minor edit.

National Office Report

Andrews welcomed the members; she stated that she has been out of the loop for a few days due to family emergency. However, she is now reviewing her emails and will respond to any correspondence that needs her attention.

There are 802 applicants so far received from the USA Jobs recruitment for TAP volunteers. The recruitment period will close on April 20, 2015.

Andrewes discussed briefly the IRS protocol in place to contact staff. She stated that in TAP, the first line of contact is the project committee analyst, second the manager if there is no response, then the panel members can reach out to her.

A calendar invitation will be sent out today for the TAP Chair/Vice Chair Teleconference Training; this will be held on April 23, 2015, at 2 p.m. Eastern Standard Time.

TAC Appointment Test

Amy Albee joined the call as the Subject Matter Expert (SME) on the Appointment Test for online appointments. She stated that there were 17,000 appointments scheduled through March 14, 2015 – a total of 23,000 contacted the IRS. There are no statistics at this time kept on the status of taxpayers who contacted the IRS. Albee mentioned that the 6,000 that contacted the IRS may have resolved their situation on the phone or have changed their minds.

Scott Wallace stated that he has tested the on line appointment system and found that it is very simple for taxpayers to use. The concern from Wallace is that the IRS has not responded to his request submitted twice through the system.

Albee stated that the IRS does try to respond to the online request for appointments but at times, there are staffing issues that affects contacting taxpayers timely. Albee will follow up on the feedback she received from the panel members on the process in place.

Subcommittee 1 – Report

MJ Thomson stated her subcommittee received an answer from the IRS on IT Efforts. They are continuing to develop statements and are continuing to work on the brainstorm list to identifying subjects to work. The subcommittee received two issues:

1. Taxpayers unable to obtain tax forms and publications.
2. Taxpayers wait times very lengthy at TACs.

Subcommittee 2 – Report

Christensen mentioned that Simpson invited two SMEs to discuss the scope of service provided by Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) services. The SMEs discussed the TAC and VITA tax preparation programs. The subcommittee asked questions on the scope of the VITA/TCE programs and could it be expanded to the level of the TAC return preparation. The SMEs stated



that the IRS training program is an intense two-week program that would not be suitable for volunteers. In addition, the SMEs stated that the Affordable Care Act (ACA) would be a separate certification within the volunteer training program. The Premium Tax Credit may be moved to the advanced certification level.

Activity Report

Cook provided the monthly report on outreach activities submitted by members through March 25, 2015. There were 24 outreach events with an audience of 1,283.

Public Participation

None

Round Table

N/A

Closing

Goldberg and Jeans closed the meeting and thanked everyone for attending.

Next meeting: Wednesday, May 13, 2015, 3 p.m. EST

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

**Taxpayer Assistance Center (TAC) Committee Meeting
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
March 11, 2015**

IRS Staff

- Rose A. Babb – Management Assistant, TAP
- Tamikio Bohler – Program Analyst, W&I
- Sheila Stevens-Brown – Program Analyst, W&I
- Cindy Jones – Supervisor, W&I (Absent)
- Otis Simpson – Program Analyst, TAP
- Cedric Jeans – Designated Federal Officer
- Beth Braddock – Management & Program Analyst, W&I (Absent)
- Beth Scott – Program Analyst, W&I (Absent)

TAP Members

- Josiah Berry – Greenwood, IN
- Richard Christensen – Boise, ID
- David Donathan – Springfield, KY
- Allan Goldberg – Hunter, NY
- Francis Grinnan – Rochester, NY (Absent)
- Robert Phillips – Dallas, TX (Absent)
- Alphonse Piard – Miami, FL
- David Thies – Alton, IL
- Sallie Thompson – New York, NY
- Mary Jo Thompson – Oklahoma City, OK
- Pamela Trafford – Amherst, MA
- Scott Wallace – Zephyr Cove, NV

Welcome/Announcements

Jeans welcomed everyone and declared the meeting opened.

Chair Comments

Goldberg welcomed everyone to the teleconference meeting. He thanked the members for their attendance at February's full committee teleconference. He stated that the recruitment for TAP has begun (March 9 – April 20, 2015) the website is www.usajobs.gov. Members were asked to take the opportunity to invite their friends and neighbors to check the federal register notices monthly for a listing of TAP Teleconferences.

Roll Call & Approval of Minutes

Quorum was met for this meeting. The minutes for February's teleconference were approved by the members. The minutes will be posted to www.improveirs.org.

National Office Report

Andrews welcomed the members; she stated that TAP has started the recruitment process for new members for 2015. The recruitment is different this year; instead of using www.improveirs.org, TAP is now using www.usajbs.gov website. The hope is that this will draw a larger pool of applicants.

Andrews reminded the members of the All TAP Virtual Meeting on March 12, 2015 at 3:00pm; this gives the chairs of each project committee an opportunity to share the committee's work, questions and concerns. In addition, this also gives the TAP staff an opportunity to provide feedback on any questions and other concerns of the project committees.

Designated Federal Officer

Jeans stated that November 11, 2015 is a holiday and so, the monthly teleconference has to be rescheduled. An email will be sent to members with possible dates and times to have the TAC meeting.

Jeans mentioned to the members that during their outreach activity, they can provide information to their audiences on the federal register.

Elevated Issues

Issue# 28183 – *Cash Payments in the Taxpayer Assistance Centers* – in response from the IRS, Mullins-Thompson stated that she thinks that the response was not positive. Goldberg explained that the current rejection does not address the cash payment proposal that the current VSD committee is working on; Goldberg agrees with the IRS rejection. Simpson will send out the original proposal to the committee and Piard will provide some background on the original document. Goldberg mentioned that we need to receive information timely from the IRS. This committee agreed to close this issue.

Issue#27922 – *Promoting Alternative Service Channels for E-filing and Payment of Form 2290, Heavy Highway Vehicle Use Tax Return* – The Department of Motor Vehicle is taking an active role in being an ERO in regards. The committee needs a response from the IRS that addresses the recommendations.

Bohler has notated some comments and questions to discuss with the IRS Subject Matter Experts (SMEs).

Subcommittee 1 – Report

MJ Thomson stated that Bohler is assisting her subcommittee with questions that were elevated to the IRS; they held a brainstorming session on March 4, 2015.

Subcommittee 2 – Report

Christensen stated that his subcommittee is looking at VITA's retention of volunteer preparers; they are focusing on the recruitment process.

Public Participation

None

Round Table

Wallace stated that he is looking at the VSD and wants to put some questions together to be reviewed by Bohler and SMEs. Wallace was asked to send the list of questions to Simpson; Simpson will send those questions to Bohler.

Closing

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

Next meeting: Wednesday, April 8, 2015, 3 p.m. EST

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



**Taxpayer Assistance Center (TAC) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
February 11, 2015**

IRS Staff

- Rose A. Babb – Management Assistant, TAP
- Tamikio Bohler– Program Analyst, W&I (Absent)
- Cindy Jones – Supervisor, W&I (Absent)
- Otis Simpson – Program Analyst, TAP
- Cedric Jeans – Designated Federal Officer
- Beth Braddock – Management & Program Analyst, W&I (Absent)
- Bill Mezger – Portfolio Manager, TAS (Absent)
- Beth Scott – Program Analyst, W&I (Absent)

TAP Members

- Josiah Berry – Greenwood, IN
- Richard Christensen – Boise, ID
- David Donathan – Springfield, KY
- Allan Goldberg – Hunter, NY
- Francis Grinnan – Rochester, NY
- Robert Phillips – Dallas, TX
- Alphonse Piard – Miami, FL
- David Thies – Alton, IL
- Sallie Mullins-Thompson – New York, NY
- Mary Jo Thomson – Oklahoma City, OK
- Pamela Trafford – Amherst, MA
- Scott Wallace – Zephyr Cove, NY

Welcome/Announcements

Cedric Jeans welcomed everyone and declared the meeting opened.

Chair Comments

Allan Goldberg welcomed everyone to the first teleconference meeting of the year. He stated to the committee members that he hopes that they are becoming engaged with outreach activities. Goldberg asked members to reach out to their Local Taxpayer Advocate (LTA) to collaborate efforts on performing outreach.

Roll Call & Approval of Minutes

Quorum was met for this meeting. The minutes for January's face to face meeting were approved with one minor edit to be made. The minutes will subsequently be posted to www.improveirs.org.



Designated Federal Officer

Jeans stated that there will be some changes to the TAP Staffing. He mentioned that Sheila Andrews is on vacation this week; she will be joining the teleconferences each month once she returns. Jeans reminded the members to continue to reach out to their LTA to establish a rapport.

Jeans also informed members that performing outreach activities will not involve overnight hotel accommodations. In addition, members are asked to send a request to Babb and Jeans for mileage or public transportation cost before beginning any outreach event.

Elevated Issues

Issue #28100 – *Individual Taxpayers Identification Number, ITIN*. The subcommittee will take a look at the old recommendations rebuttals and reconsiderations from the TAC Committee in 2014.

Issue #28183 – The subcommittee will follow up and respond to this issue on the March teleconference.

Subcommittee 1 – Report

Mary Jo Thomson stated that on last week's call, her subcommittee reviewed the mission statement. The members are developing TAC process – using TAP Space to build a list of questions for the IRS. Thompson sent a pie chart to the group. Thompson will provide a list to Simpson with the process at the next teleconference in March. Thompson will forward Virtual System Delivery (VSD) questions to Simpson so he can forward to Tamikio Bohler for Subject Matter Expert (SME) response.

Subcommittee 2 – Report

Christensen stated that on last week's call, his subcommittee discussed taking a look at tax return processing and Volunteer Income Tax Assistance (VITA). The subcommittee will revisit those issues and will pick up where they previous subcommittee left off in 2014. The committee will narrow focus and collect data to support issue recommendation. Simpson and Jeans will follow up on IRS responses from last year.

Public Participation

There were no members of the public on the teleconference.

Round Table

The members were given an opportunity to have a discussion on any other issues and ask questions. There were some discussions on VITA guidelines.

Goldberg stated that he will work on balancing the subcommittees' members equally. Members can contact him if anyone wants to move over to help another subcommittee



as well. He also noted that if a member wants to join a subcommittee teleconference call other than their own subcommittee, call, feel free to do so. Scott Wallace volunteered to join the VSD committee. Committee balance is now 7 to 5.

Goldberg stated that if you are not on a subcommittee doesn't mean you cannot attend the call; Invitees everyone to attend.

Thomson was able to visit a VSD kiosk in Colorado Springs; She did a write up www.tapspace.org; No ELMO at VSD but she states they are adding; Need to know how many people are being served by the kiosk; Will ask for number from Program Owner. Goldberg asked is there anyone living close to an external VSD? Thompson has the list of kiosk. Lists a few places. Wallace asks what are the privacy issue with VSDs. Thompson said there is one in Staten Island, NY. Thomson provided info on VSD privacy; Thompson says report came from W&I report. Goldberg suggests asking SME about VSD operational guideline; Staff will mail outreach items to TAC members: 100 speak up brochures; 50 self-mailers and about 10 recruitment cards.

Goldberg reached out to his Internal Revenue Program Advisory Committee (IRPAC) and Internal Revenue Service Advisory Council (IRSAC) sources in his community. He discussed some of the issues that IRPAC and IRSAC worked that are very similar to TAP issues. He asked the members to do the same in their community.

Closing

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

The next TAC meeting will be on Wednesday, March 11, 2015 at 3 p.m. EST.

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



**Taxpayer Assistance Center (TAC) Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
January 15 – 16, 2015**

Day 1

Meeting was opened by Acting DFO Otis Simpson at 8:02 a.m.

Committee Member Present

- Josiah Berry
- Richard Christensen
- David Donathan
- Allan Goldberg
- Francis "Frank" Grinnan
- David Thies
- Sallie Thompson
- Mary Jo Thomson
- Pamela Trafford
- Scott Wallace

Committee Members Absent

- Robert Phillips
- Alphonse Piard

TAP STAFF Present

- Robin Owsley
- Linda Rivera
- Otis Simpson
- Cedric Jeans (by phone)

IRS Staff

- Tamikio Bohler
- Shelia Stevens

Public

None

Meeting Activities

Members and staff introduced themselves and participated in an ice breaker exercise to get acquainted.

Committee Elections

There was the explanation of elections for committee Chairman and Vice Chairman, followed by nominee's bios and then voting. Chair nominees were Allan Goldberg, Mary Jo Thomson. Vice Chair nominees were Frank Grinnan and Mary Jo Thomson.

There was a presentation by Staff Analyst Robin Owsley on Roles and Responsibilities of committee members

Election Results were tabulated:

Chair Votes

Allan Goldberg 9

Mary Jo Thomson 0

Vice Chair Votes

Frank Grinnan 7

Mary Jo Thomson 3

Action Item: Allen Goldberg committee Chairperson and Frank Grinnan committee Vice chairperson.

Minutes

Committee Chairman Allan Goldberg took over for the approval of the November 2014 Meeting Minutes and they were approved.

Presentations

There was a presentation by Beth Braddock Wage and Investment Policy Analyst on Field Assistance, Who Are We?

Virtual Service Delivery (VSD) Presentation

Donnie Vester, Subject Matter Expert (SME)

- Kiosks are located in different areas of the W&I Offices.
- There are kiosks being used by other Business Units also.

Dave Donathan – Question

The Universities have student centers can they be located there?

Low-Income Taxpayer Clinics (LITCs) have places affiliated with the campuses.

We are trying to partner with Stakeholder Partnerships, Education & Communication (SPEC). We are limited with the partners themselves and whether or not they want to partner up. We are not limited to SPEC.

Where we have machines available were we had to work hard to find partners that will have the kiosk secure.

Right now we are using network technology that requires disclosure, disclosure area, and chatting, virtual, \$80,000 as a minimum to set up. If you go to IRS.Gov you can have access to services and its more flexible even from the taxpayers home and IRS employees can be a virtual agent.

Allan Goldberg – Question and Statement

The total aspect is that there needs to be a unit and there is no staffing to handle the VSD?

Donnie – TAC has to work the line and so you are always in the mode to have enough staff. If we can expand to current call sites and EE's available it would help.

Allan Goldberg – Does the IRS have that capability right now?

Donnie – We have the capability but we have to set the structure up and open it to other business units.

Sallie – Can we use the irs.gov site for the VSD?

Donnie – Yes, we also have individuals in the TAC sites that support the VSD. We have three other VSD sites we don't support governed by TAS. Since TAS is not using them they are allowing us to utilize them. Reno, San Diego and Tampa.

Miami is a new partner with Appeals and also Pensacola, Florida.

TAC COMMITTEE MEETINGS

Full Committee Meeting – Every Second Wed (2:30 – 3:30) (EST)

Sub One Team – (VSD) (LEAD) – Mary Jo Thomson, Sallie Thompson, David Donathan, Pamela Trafford, Allan Goldberg.

Every First Wed of the Month (1:30 – 2:30) (EST)

Sub Two Team – (VITA) (LEAD) (Kent) (Tax Return Processing) Robert Phillips, Frank Grinnan, Josiah Berry, Alphonse Piard, Dave Thies, Allan Goldberg.

Every First Wed of the Month (2:30 – 3:30).

Outreach – Frank Grinnan

QR Committee – Allan Goldberg, Pamela Trafford, Kent, David, Sallie Thompson.

There was a presentation on Travel Expense procedures and Outreach Activity Events and reporting. Followed by closing announcements and the meeting closed at 4:33 p.m.



**Taxpayer Assistance Center (TAC) Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
January 15 – 16, 2015**

Day 2

The meeting was opened by Acting DFO Otis Simpson at 8 a.m.

Roll Call

Committee Member Attendees

- Josiah Berry
- Richard Christensen
- David Donathan
- Allan Goldberg
- Francis "Frank" Grinnan
- David Thies
- Sallie Thompson
- Mary Jo Thomson
- Pamela Trafford
- Scott Wallace

Committee Members Absent

- Robert Phillips
- Alphonse Piard

TAP Staff Attendees

- Robin Owsley
- Linda Rivera
- Otis Simpson
- Cedric Jeans (by phone)

IRS Staff

- Tamikio Bohler

Public

None

Group Trip

The committee visited the Atlanta Summit Building TAC Office for a visual tour led by TAC Office Manager Yvonne Alexander.

TAP Presentation

There was a short presentation by TAP Analyst Robin Owsley reviewing screening an issue and the committees broke back out into their groups to complete discussion and develop next actions for each of the two subcommittees.

The committee mission was developed during the face to face.

Subcommittee 1 – VSDs

The committee decided the following as their mission:

Consider the increased use of technology, including VSD, as a means of improving taxpayers' experience and service with the Internal Revenue Service (IRS). The established some action items: To develop list of questions for the IRS that we had regarding the TAC. Email their questions to their lead for their next meeting on February 4, 2015, 3:30 p.m. to 4:30 p.m., EST.

Subcommittee 2 – VITA and Tax Return Processing

They developed their mission or problem statement. They reviewed what is available on IRS.gov, regarding what services are offered. They reviewed what services are available at TACS and what services are available at VITA TCE and also assigned actions items for the next meeting on February 4, 2015, 2:30 p.m. to 3:30 p.m., EST.

There were closing remarks by Goldberg, encouraging the members to stay engaged and to read the handouts on the NTA's Report. Closing remarks by Cedric Jeans, DFO, and staff analyst, and the meeting closed at 11:47 a.m.

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