



Taxpayer Assistance Center (TAC) Committee Meeting Meeting Minutes

- November 9, 2016
 - October 12, 2016
 - September 14, 2016
 - August 10, 2016
 - July 13, 2016
 - June 8, 2016
 - May 11, 2016
 - April 13, 2016
 - March 3-4, 2016
-

Taxpayer Assistance Center (TAC) Committee Meeting Taxpayer Advocacy Panel (TAP) Meeting Minutes November 9, 2016

IRS Staff

- Sheila Andrews – TAP Director
- Rose A. Babb – Management Assistant, TAP
- Tamikio Bohler– Program Analyst, W&I
- Cedric Jeans – Designated Federal Officer
- Betty Scott – Program Analyst, W&I (Absent)
- Gretchen Swayzer – Program Analyst, TAP
- Linda Swenson – Program Analyst, TAP

TAP Members

- Dawn Basciano – Sacramento, CA
- Josiah Berry – Greenwood, IN
- Richard Christensen – Boise, ID
- Jamelda Fulton – Greenville, MS
- Holly Hoffman – Amherst, WI
- Jon Lumbrá – Holyoke, MA (Absent)
- David Thies – Alton, IL
- Scott Wallace – Zephyr Cove, NV

Welcome/Announcements

This is the last full teleconference meeting for the TAC Committee for 2016; Jeans welcomed everyone and declared the meeting opened.



Chair Comments

Christensen welcomed everyone and proceeded with the agenda. There was a quick discussion with members about the face to face training/meeting and face-to-face (FTF) dates for 2017. Christensen indicated that Joint Committee (JC) is considering moving the FTF meeting into the first week of February instead of the second week in January. This change is due to the tax filing season schedule for 2017. Christensen asked members to respond to him and the TAP Staff to inform them if this new schedule conflicts with theirs.

Roll Call & Approval of Minutes

Quorum was met for this meeting; the minutes for September and October were approved for posting with two minor edits to be made before posting to www.improveirs.org.

National Office Report

Andrews thanked the members for their hard work all year; she also thanked and expressed her appreciation to members Fulton and Thies who are rotating off of the TAP program.

Andrews reiterated the suggested new date for the FTF meeting; she mentioned that the National Taxpayer Advocate, Nina Olson, makes every effort to get the funds for the meetings.

Returning members should respond as soon as possible with their choice for Chair and Vice Chair TAP positions. The selection will take place later this week.

Subcommittee Report – 1

Hoffman reported out on the status of issues #35283 *Improved Signage at Taxpayer Assistance Centers: Publication Holder for Web Based Solutions/alternatives* and #35292 *Improve Appointment Process with Confirmation Notices*. The members approved these two issues to go forward to the JC; these issues will be on the agenda for November 30, 2016.

Activity Report

Basciano reported that for the month of October four Outreach Reports were received and; most members did not submit Outreach Reports.

Public Participation

There were no members of the public on this call.

Round Table



Christensen reminded the members to go ahead and send in reports; for those who are rotating off the panel, they can amend their outreach hours in order to receive credit for all outreach events.

Jeans thanked Fulton and Thies for their work in the TAC Committee and asked them to continue doing outreach whenever they can to make connections in the field on how to improve the IRS.

Jeans thanked Christensen for his work as the Chair of the TAC Committee.

Action Item(s)

There were no action items for this meeting.

Closing

Jeans closed the meeting and thanked everyone for attending. This was the last TAC Monthly meeting for the year.

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



**Taxpayer Assistance Center (TAC) Committee Meeting
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
October 12, 2016**

IRS Staff

- Sheila Andrews – TAP Director
- Rose A. Babb – Management Assistant, TAP
- Tamikio Bohler– Program Analyst, W&I
- Cedric Jeans – Designated Federal Office
- Betty Scott – Program Analyst, W&I
- Otis Simpson – Program Analyst, TAP
- Gretchen Swayzer – Program Analyst, TAP

TAP Members

- Dawn Basciano – Sacramento, CA
- Josiah Berry – Greenwood, IN (Absent)
- Richard Christensen – Boise, ID
- Jamelda Fulton – Greenville, MS (Absent)
- Holly Hoffman – Amherst, WI (Absent)
- Jon Lumbra – Holyoke, MA (Absent)
- David Thies – Alton, IL (Absent)
- Scott Wallace – Zephyr Cove, NV

Welcome/Announcements

Jeans welcomed everyone and declared the meeting opened.

Chair Comments

Christensen welcomed everyone and proceeded with the agenda. He mentioned that he is working on the 2015 TAP Annual Report with analyst Swayzer. Christensen also mentioned that the monthly outreach activity report will be published in the TAP Annual Report as it reflects how valuable the members are in bringing in issues and concerns from taxpayers.

Roll Call & Approval of Minutes

Quorum was not met for this meeting, therefore; the minutes for September were not approved for posting to www.improveirs.org.

National Office Report

Andrews thanked the members for the work they have done all year; she informed the members of the upcoming elections for TAP Chair and Vice Chair positions for the new TAP year. A teleconference is scheduled for October 25, 2016, at noon EST to discuss



the process and how to nominate a member. If one nominates a member, they should interview the member to ascertain if they are interested. Returning members can write a small biography. If members have questions, they should feel free to contact TAP Staff including the current Chair and Vice Chair of TAP – Jones and Cooney.

Returning members have a chance to select their choice of committee they want to serve on next year. TAP Staff tries to accommodate returning members' first choice. Members can also elect to remain on the same committee next year.

TAP Staff is in the process of completing the background checks for those members interviewed for the panel's 2017 membership. Those background checks that have been completed have been sent forward to the National Taxpayer Advocate and will subsequently be sent to the Department of Treasury for consideration appointment to the panel.

Subcommittee Report – 1

Wallace reported for the committee on the two issues the sub-committee is looking at for possible referrals.

- Better signage in TAC offices and attach the "Hate to Wait" publication. He sent referral to the sub-committee with a picture of what can be done.
- Automated appointment confirmation either by email, text or phone. IRS has indicated in a response to the TAP that they have requested funding.

TAP will move forward first with the better signage proposal. Jeans explained that the proposal needs to be approved by the sub-committee. Once approved, the proposal will be written up as a referral and contain the recommendations.

Subcommittee Report – 2

Christensen reported that this subcommittee did not meet in September. The committee has been putting together a letter that is to be sent to colleges and universities regarding instructions they give students regarding federal tax transcripts. The letter was sent to QR but due to losing members of QR, the letter is still in review. Christensen has seen the letter and it is not ready. He will have to step in to QR and see if he can get the letter moving. Berry prepared the letter and Christensen will get with him.

Activity Report

The TAC committee had a few members resigned and so, the outreach numbers were low for the last few months. For the month of September, there were 84 outreach hours reported with three events. With a full committee for 2017 TAP year, the outreach numbers are expected to be better.

Public Participation



Two members of the public joined the call from the General Accounting Office. There were no comments offered.

Round Table

There were no additional discussions.

Action Item(s)

Basciano will review and edit the proposal for the appointment confirmation with Hoffman by Friday, October 14, 2016.

Swayzer will follow-up on the Publication number for the "Hate to Wait" that will be available for taxpayers in October 2016.

Swayzer will send Wallace the most current project referral form.

Closing

Jeans closed the meeting and thanked everyone for attending.

Next meeting: Wednesday, November 9, 2016 – 2 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 14, 2016**

IRS Staff

- Sheila Andrews – TAP Director
- Rose A. Babb – Management Assistant, TAP
- Tamikio Bohler – Program Analyst, W&I
- Beth Braddock – Program Analyst, W&I
- Cedric Jeans – Designated Federal Officer
- Susan Jimerson – Program Manager
- Betty Scott – Program Analyst, W&I
- Gretchen Swayzer – Program Analyst, TAP

TAP Members

- Dawn Basciano – Sacramento, CA
- Josiah Berry – Greenwood, IN
- Richard (Kent) Christensen – Boise, ID
- Jamelda Fulton – Greensville, MS
- Holly Hoffman – Amherst, WI
- Jon Lumbrá – Holyoke, MA (Absent)
- David Thies – Alton, IL
- Scott Wallace – Zephyr Cove, NV

Welcome/Announcements

Swayzer welcomed everyone and declared the meeting opened.

Chair Comments

Christensen welcomed everyone and proceeded with the agenda. He informed the members that Murray and Williams have resigned from the TAC Committee and that our committee is getting smaller as we approach the close of the TAP year.

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 informed the members that TAP committees are now approaching the end of the year. She reminded the members that while we want to complete referrals during the TAP year, if they cannot finish up some referrals in the next two months, they can be carried forward and completed in the new TAP year.



Andrews also mentioned that within the next few weeks, there will be an election for the TAP Chair and Vice Chair positions. If a member wants to self-nominate themselves or someone else, this is the time to do so. If nominating someone else, you need to have a conversation with them to ensure they are interested. Will have a “Meet the Candidate” the first part of November. Andrews thanked everyone for their hard work.

Vice-Chair Election

Christensen noted that our vice-chair has resigned and he sent out a request for nominations to the committee. Christensen asked the members for any nomination suggestions. Hearing none, it was noted that he received one nomination for Dawn Basciano. Basciano accepts the nomination. Christensen asked for any discussion and hearing none, asked to elect Basciano as vice-chair. By consensus, Basciano is the new vice-chair for the remainder of the TAP year.

Subcommittee Report – 1

The approved survey questions and TAC managers’ appointments were received. The members reported out on the calls they made to the TAC managers and the completion of the surveys. The results are to be forwarded to Christensen and Scott who will compile the data in one spreadsheet. There have been some scheduling issues due to TAC managers experiencing some TAC staffing issues but, it is expected that surveys will be completed by Friday, September 21. Once the results are consolidated, the committee will review and determine if a referral is needed.

Subcommittee Report – 2

Christensen sent out a draft letter for colleges and universities to the committee for comment. Once the members respond, the subcommittee will put together a referral to be approved and send to the Joint Committee.

Activity Report

Swayzer reported that only three activity reports were received for the month of August. That represents only 30 percent of the committee. Of the total 7,973 hours reported from all committees, only 959 of those hours are from TAC which is 12 percent. We know that much work is being performed and want to ensure your work is properly reflected. We are nearing the end of the TAP year and want to get everyone’s hours in.

Christensen asked the committee if there were reasons members are not submitting reports. Hoffman stated she submitted but doesn’t know if hers was received. Swayzer will send out a record to each member indicating monthly reports received.

Screening Committee

Swayzer reported that a screening meeting was not conducted this month as there was only one new issue that did not pertain to TAC and was a complaint about a TAS employee. The issue was closed as agreed by the screening committee members.



Public Participation

There were no members from the public on the call.

Round Table

There were no additional comments.

Action Item(s)

Swayzer to send out receipt of activity reports to members

Members were informed that is not too late to submit past month reports so please do so.

Closing

Jeans closed the meeting and thanked everyone for attending.

Next meeting: Wednesday, October 12, 2016 – 2 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 10, 2016**

IRS Staff

- Sheila Andrews – TAP Director
- Rose A. Babb – Management Assistant, TAP
- Tamikio Bohler – Program Analyst, W&I
- Beth Braddock – Program Analyst, W&I
- Cedric Jeans – Designated Federal Office
- Betty Scott – Program Analyst, W&I
- Gretchen Swayzer – Program Analyst, TAP

TAP Members

- Dawn Basciano – Sacramento, CA
- Josiah Berry – Greenwood, IN
- Richard (Kent) Christensen – Boise, ID
- Jamelda Fulton – Greenville, MS
- Holly Hoffman – Amherst, WI
- Jon Lumbrá – Holyoke, MA (Absent)
- Chardea Murray – Jacksonville, FL
- David Thies – Alton, IL (Absent)
- Scott Wallace – Zephyr Cove, NV
- Randy Williams – Memphis, TN

Welcome/Announcements

Jeans welcomed everyone and declared the meeting opened.

Chair Comments

Christensen welcomed everyone and proceeded with the agenda.

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 that the Joint Committee Virtual Meeting is coming up on August 16, 2016 through August 19, 2016. This meeting schedule was sent to all TAP members. TAC members are encouraged to submit questions/ comments to address during the meeting.



Subcommittee Report – 1

Hoffman stated that the draft copies of the survey questions were reviewed by her subcommittee; there are two more questions that still need to be reviewed. Swayzer will forward those questions/comments to W&I for further review.

Subcommittee Report – 2

Berry stated that the “Get Transcripts” proposal draft has been edited by his subcommittee. He will make the final edits this weekend. Berry mentioned that he will add an IRS link to the brochure content for universities to use to submit their responses directly to www.improveirs.org.

Activity Report

The activity reports from members are approximately 30 percent. Murray mentioned that she will take a more active role to ensure members submit their activity reports timely.

Murray mentioned that during the last outreach meeting, there was an interest from some members to expand the Monthly News Letter. She asked for some feedback from the committee. Some of those questions were:

- Does anyone read the newsletter?
- Is the content enough or should it be expanded?
- How often should it be issued?
- Should some duties for writing up the article stories be shared between the members and the chair?
- Should individual members be highlighted for success outreach stories?
- Would the committee want to see more stories covered or would they want to increase the characters to lengthen their comments?
- Would members be interested in sharing the newsletter during their outreach events?

Screening Committee

Swayzer mentioned there were 18 issues reviewed this month; an email was shared with the full committee with a list of the issues. Out of the 18 issues, 2 were referred to the Toll Free Committee, 7 were dropped and 9 were closed and associated with other projects.

If the committee members have any questions on the screening report issues, they should email Swayzer.

Public Participation

There were no members from the public on the call.

Round Table

There were no additional comments.



Action Item(s)

Christensen will join Wallace to replace Hanssen to collect and roll up the W&I survey results.

Remember that Gretchen Swayzer is the primary contact; all emails should be sent to her and Jeans. Otis Simpson is on a detailed assignment.

Closing

Jeans closed the meeting and thanked everyone for attending.

Next meeting: Wednesday, September 14, 2016 – 2 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 13, 2016**

IRS Staff

- Sheila Andrews – TAP Director
- Rose A. Babb – Management Assistant, TAP
- Tamikio Bohler – Program Analyst, W&I
- Beth Braddock – Program Analyst, W&I
- Cedric Jeans – Designated Federal Office
- Betty Scott – Program Analyst, W&I
- Otis Simpson – Program Analyst, TAP
- Gretchen Swayzer – Program Analyst, TAP

TAP Members

- Dawn Basciano – Sacramento, CA
- Josiah Berry – Greenwood, IN
- Richard (Kent) Christensen – Boise, ID
- Jamelda Fulton – Greenville, MS (Absent)
- Kelly Hanssen – Austin, TX (Absent)
- Holly Hoffman – Amherst, WI
- Jon Lumbra – Holyoke, MA (Absent)
- Chardea Murray – Jacksonville, FL
- David Thies – Alton, IL (Absent)
- Scott Wallace – Zephyr Cove, NV
- Randy Williams – Memphis, TN

Welcome/Announcements

Jeans welcomed everyone and declared the meeting opened.

Chair Comments

Kent Christensen welcomed everyone and proceeded with the agenda. He informed the members that the committee is half way through the TAP year. Christensen is encouraging the members to work with their committee leads to get referrals moving to the Joint Committee. Christensen also reminded members that referrals may require some editing, which could take some time to be done thoroughly.

Roll Call & Approval of Minutes

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



National Office Report

Andrews informed the members that the recruitment/interview process is moving along very well. She thanked all the members that volunteered their time to assist TAP Staff with the interviews.

Simpson will be going on a detail assignment with Systemic Advocacy in a few weeks. The new analyst taking his place during this time will be Gretchen Swayzer. Jeans told the members that Swayzer's contact information will be shared via email.

Jeans asked the members to take a look at the news articles on www.TAPSpace.org. There was a recent news article that mentions the release of the June Annual Report to Congress and it listed some of the Most Serious Problems (MSPs). Jeans informed the members to review the report for the National Taxpayer Advocate's perspective on IRS reduction in services, which may impact Taxpayer Assistance Centers (TAC)s and the work of the committee.

Elevated Issues

On Project 33689, *Limitations on Volunteer Tax Assistance Programs Hamper Support for Underserved Taxpayers*, Christensen asked the members for their input on this Project whether to accept or reject the IRS responses. The full committee suggested a motion to accept the IRS responses to all elevated recommendations.

Subcommittee Report – 1

Hoffman stated that a draft copy of the survey questions will be on www.TAPSpace.org for members to review. All edits or suggestions are due by July 14, 2016. After the editing process is completed, a final version of the survey questions will be posted on www.TAPSpace.org for full committee approval before submitting to Otis to forward to the IRS for their consent.

The following are committee assignments:

- Basciano will be editing the survey questions.
- Hanssen and Wallace will be responsible for collecting and rolling up survey results.
- Hoffman will be selecting 35 TAC offices and assigning them to committee members to conduct surveys.
- Basciano, Hanssen, Hoffman, Lumbrá, and Wallace will be assigned 7 TAC managers to conduct surveys. There will be scheduled appointment times to call the TAC managers.

Wallace provided an over view to the members from last year's survey of TAC managers and offices.



Simpson suggested that Hoffman select alternative TAC offices to contact in case managers cannot be reached.

Subcommittee Report – 2

Berry stated that he is looking at methods to revise the formatting of the “Get Transcripts” proposal. He indicated that the IRS Transcripts are often not perceived as authentic by colleges/universities. The subcommittee will continue working of letter to provide to colleges/universities to support completion of referral back to IRS.

Activity Report

The activity reporting from members is approximately 50 percent. Murray mentioned that she will take a more active role to ensure members are timely submitting their activity reports along with having the resources that can help them with conducting outreach. Jeans suggested using a calendar reminder on smart phones and/or a calendar reminder sent from staff to remind the members to submit their hours to receive credit.

Murray stated that some Local Taxpayer Advocates (LTA) may not be able to travel due to budget constraints, therefore some members may be asked to volunteer on behalf of the LTAs.

Screening Committee

The screening committee did not meet for the month of July. There are approximately 12 new issues and the Screening Committee will meet next month to address. Simpson stated most of the incoming issues related to complaints about “wait times” at the TAC offices.

Public Participation

There were no members from the public on the call.

Round Table

There were no additional comments.

Action Item(s)

Hoffman will post survey document in www.TAPSpace.org for review and edits due July 14, 2016.

Closing

Jeans closed the meeting and thanked everyone for attending.

Next meeting: Wednesday, August 10, 2016 – 2 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 8, 2016**

IRS Staff

- Sheila Andrews – TAP Director (Absent)
- Rose A. Babb – Management Assistant, TAP
- Tamikio Bohler – Program Analyst, W&I
- Cedric Jeans – Designated Federal Office
- Betty Scott – Program Analyst, W &I
- Otis Simpson – Program Analyst, TAP

TAP Members

- Dawn Basciano – Sacramento, CA
- Josiah Berry – Greenwood, IN
- Richard Christensen – Boise, ID
- Jamelda Fulton – Greenville, MS
- Kelly Hanssen – Austin, TX
- Holly Hoffman – Amherst, WI
- Jon Lumbrá – Holyoke, MA (Absent)
- Chardea Murray – Jacksonville, FL
- David Thies – Alton, IL
- Scott Wallace – Zephyr Cove, NV
- Randy Williams – Memphis, TN (Absent)

Other Committee (Guest)

- Sean McPhilamy – Toll Free Committee, Chair

Welcome/Announcements

Jeans welcomed everyone and declared the meeting opened.

Chair Comments

Christensen welcomed everyone and proceeded with the agenda.

Roll Call & Approval of Minutes

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

National Office Report

Jeans reported that online Get It Transcripts are now available for taxpayers once again. A news release with an embedded video is posted in TAP Space database for members to review.



The process for the 2017 TAP recruitment season has started. Members are encouraged to volunteer. If interested members should send an email to the analyst of their committee.

Subcommittee Report – 1

Christensen stated that there are some issues with the Video Project. Some of his comments were that it is difficult to play sound in the TAC offices where taxpayers are meeting with staff. This project will be sent to the Tax Forms and Publications Committee with some ideas and suggestions for improvement from TAC.

Holly Hoffman is now the new chair of the Subcommittee.

Subcommittee Report – 2

Berry stated that his subcommittee had a great meeting last Thursday. There were two Subject Matter Experts from the Department of Education and Wage & Investment division of the IRS. Some of the issues were that students are sent to TAC in error to certify transcripts and those TACs do not certify transcripts. Berry stated that the colleges will include some information to assist on their letter head.

Activity Report

The outreach numbers are very low. Murray recommended that members place the activity report on their desk top to make it more accessible to complete timely. The members were encouraged to provide outreach reports monthly in order to receive credit for their volunteer work and justify the TAP program. Murray has agreed to work with members to reconcile their time.

Screening Committee

Simpson discusses the issues screened by the screening committee on May 9, 2016. Simpson states there were two main issues that the screening committee noticed in regards to TAC operating hours and express services. The issues involved the public being turned away before close of business and there did not appear to be consideration of allowing the public access to express service.

There was also the issue of authenticating a virtual payment that Sub-committee 2 may be able to take on as a project in the future.

Cross Functional Project

McPhilamy joined the call and discussed conducting a joint toll free line effort with the TAC Committee; Christensen will be the point of contact.

Public Participation

None.



Round Table

Hoffman asked how to obtain information on what projects the other committees are working. Jeans recommended that she reference the TAP News Letter, it lists the current work of each committee.

Hoffman mentioned that there is an email address for the disabled to get appointments but it is not published.

Action Item(s)

If members have not received their business cards, they should send an email to Simpson and Jeans.

Closing

Jeans closed the meeting and thanked everyone for attending.

Next meeting: Wednesday, July 13, 2016 – 2 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 11, 2016**

IRS Staff

- Sheila Andrews – TAP Director (Absent)
- Rose A. Babb – Management Assistant, TAP
- Tamikio Bohler – Program Analyst, W&I
- Cedric Jeans – Designated Federal Office
- Otis Simpson – Program Analyst, TAP

TAP Members

- Dawn Basciano – Sacramento, CA (Absent)
- Josiah Berry – Greenwood, IN (Absent)
- Richard Christensen – Boise, ID
- Jamelda Fulton – Greensville, MS
- Kelly Hanssen – Austin, TX
- Holly Hoffman – Amherst, WI
- Jon Lumbra – Holyoke, MA (Absent)
- Chardea Murray – Jacksonville, FL
- David Thies – Alton, IL
- Scott Wallace – Zephyr Cove, NV
- Randy Williams – Memphis, TN (Absent)

Welcome/Announcements

Jeans welcomed everyone and declared the meeting opened.

Chair Comments

Christensen welcomed everyone; he mentioned the teleconference call yesterday that discussed the Future State for the IRS. He highlighted that although there are some digital changes in correspondence, there will still be options to speak to a live person. He then proceeded with the agenda for the call.

Roll Call & Approval of Minutes

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

National Office Report

Andrews thanked the members for their work and also for their favorable comments of the TAP Staff during last week's National Public Service observance. Andrews also stated to the members that the National Taxpayer Advocate, Nina Olsen will be hosting



a teleconference on May 26, 2016, at 2 p.m. EST. This meeting will cover some of the Future State initiatives from the advocate’s perspective.

Program Manager Comments

Jeans mentioned the following Tax Forums:

2016 Dates:

City	Hotel	Dates
Chicago, IL	Hyatt Regency Chicago 151 E Upper Wacker Drive Chicago, IL 60601	July 12-14
New Orleans, LA	Hyatt New Orleans 601 Loyola Avenue New Orleans, LA 70113	July 26-28
National Harbor, MD (Washington DC Area)	Gaylord National Hotel and Convention Center 201 Waterfront Street National Harbor, MD 20745	August 23-25
Orlando, FL	Hyatt Regency Orlando 9801 International Drive Orlando, FL 32819	August 30 - September 1
San Diego, CA	Town & Country Resort and Convention Center 500 Hotel Circle North San Diego, CA 92108	September 13-15

Jeans stated that Stacia Jones will send an email to all the members to solicit volunteers to attend the forums on behalf of TAP. Note, TAP members should live in local proximity of the forum; there are no overnight stays.

Jeans referenced an article loaded into TAP Space which covers Taxpayer Assistance Service from the IRS Commissioner Koskinen. The article discusses that the IRS first priority for hiring this year was to address taxpayer service issues. The IRS will add more than 1,000 W&I employees to the taxpayer phone lines after Congress provided \$290 million specifically for taxpayer service, identity theft and cybersecurity.

Subcommittee Report – 1



At the last subcommittee meeting, Christensen stated that there were two Subject Matter Experts (SMEs) on the call. They discussed the use of videos on the CCTV's in the TAC's. The members were exploring using the CCTV's in the TAC's to play existing videos from the internet to educate the waiting taxpayers of other options for service. Christensen stated that his subcommittee was informed that the TV's were not connected to the internet and the content being shown was a slide-show or PowerPoint from a thumb drive plugged into the TV. They members asked the SMEs if bigger hard drives could be used to incorporate videos.

Subcommittee Report – 2

Berry was not present for this teleconference; he was attending the Care Review Pub 4112 in Atlanta, GA. He provided this subcommittee report to Christensen:

The members are now fully focused on the get transcript project. Team members will be receiving an interview guide to use in calling local universities to investigate problems they're having with the IRS transcripts. In addition, half of the committee will be working on revisions to the get transcript process, such as the secure code system, and the other half will be working on revising the aesthetics of the transcript. Berry will update subcommittee 2 on whatever information he can share regarding taxpayer at the next subcommittee meeting. Sub-2 will have a Subject Matter Expert (SME) to answer questions regarding the get transcript process. The members should prepare questions regarding the project and submit them to Berry by May 31, 2016.

Activity Report

Murray provided a count of those members who did submit outreach reports. She asked members to resend March and April Reports again so that they can be accounted for accurately. Murray mentioned that she can provide some outreach tips and will send a reminder to submit reports monthly/timely to the TAC members via email.

Screening Committee

N/A

Public Participation

There were no members from the public on the call.

Round Table

Christensen responded to the Federal Workers Appreciation Week. He stated that he appreciate the TAP other IRS Staff for their work with the volunteers.

Action Item(s)

Christensen reminded TAP staff that there is a lot of work to do; he asked the members to use TAP Space and remember to record those hours as time spent on TAP business.



Andrews mentioned that members should ensure that TAP Space time is **NOT** used to make decisions as it would not be in keeping with FACA Rules.

Closing

Jeans closed the meeting and thanked everyone for attending.

Next meeting: Wednesday, June 8, 2016 – 2 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 13, 2016**

IRS Staff

- Sheila Andrews – TAP Director (Absent)
- Rose A. Babb – Management Assistant, TAP
- Tamikio Bohler– Program Analyst, W&I
- Cedric Jeans – Designated Federal Office
- Otis Simpson – Program Analyst, TAP

TAP Members

- Dawn Basciano – Sacramento, CA (Absent)
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- David Thies – Alton, IL
- Scott Wallace – Zephyr Cove, NV
- Randy Williams – Memphis, TN (Absent)

Welcome/Announcements

Jeans welcomed everyone and declared the meeting opened.

Chair Comments

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

Roll Call & Approval of Minutes

Quorum was met for this meeting. The minutes from the Face to Face meeting held in March were approved for posting to www.improveirs.org.

National Office Report

Jeans reported for Andrews. He stated that the 2016 TAP Recruitment has begun; the open period for new members is April 11, 2016 through May 16, 2016. TAP is recruiting from certain states. Members were encouraged to get the word out to their community for those states that TAP will be recruiting.

Members can send an email to the analyst if they need any Speak Up Brochures.



The Wage and Investment (W&I) function within the IRS has requested TAP assistance on reviewing two products. Simpson sent an e-mail to all TAC Committee members on April 12, 2016 that provided the products to be reviewed and the involvement dates. The team will meet virtually via teleconference. Simpson will confirm and send an email to the members on the turnaround time for this review. Members are asked to review the email from Simpson and respond if they would like to volunteer to review this product.

Jeans also mentioned to the members that the IRS Lead Analyst will be reaching out to members for assistance to review Business Returns Form 2290; some leverage on the input is required from TAP members. Members will receive an email on the timing for review of this form.

IRS Response

Christensen explained to the new members the process of how issues are submitted to the IRS for consideration and how to prepare issues for reconsideration. Christensen also provided some background on Issue 33689 (*Limitations on Volunteer Tax Assistance Programs Hamper Support for Underserved Taxpayers*), and other issues that were worked on and submitted last year to the IRS.

Subcommittee Report – 1

Wallace discussed the CCTV/videos to help the taxpayer understand tax issues. He stated that the IRS has 180 videos sanctioned and available on YouTube for taxpayers' assistance. Wallace also stated that some of his findings are that the videos may not be marketed well and so, he is reviewing them to condense those videos that can be put into a group. This will enable taxpayers to find what they need more efficiently.

Subcommittee Report – 2

In anticipation of his absence, Berry provided the following report. At the face to face meeting, it was decided that sub-committee 2 would be tasked with examining the issue of universities refusing to accept IRS transcripts for financial aid purposes. After a month of thought, sub-committee 2 has decided to take on the issue. This will involve, but is not limited to, examining ways the IRS could "pretty up" the transcripts to a more presentable and official looking standard, as well as exploring the ability the IRS to generate an electronic PIN system which could be provided to the universities financial aid office so that they may securely access the transcripts directly. Ideally, this would allow taxpayers to skip the process of waiting for the IRS to mail their transcript or visiting the TACs to acquire their transcripts directly, and provide universities some needed reassurance that the transcripts are indeed authentic. The primary vehicle of research will be through outreach to university financial aid offices to explore the problems universities are having with accepting IRS transcripts. I will posting more details to TapSpace over the weekend regarding this project and appreciate any input the TAC committee has.



Activity Report

Due to system problems encountered by the IRS Staff, no activity data was available. Cumulative data will be reported at the next meeting.

Screening Committee

The potential dates of the monthly Screening Committee meeting were discussed. It was decided that the meeting will occur on the second Monday of each month at 2 p.m. ET, as needed. Murray volunteered to join the committee.

Public Participation

There were no members from the public on the call.

Action Item(s)

Those members that need Speak Up brochures can contact Babb via email. Simpson will follow-up with the dates for members to review and submit forms 2290 and W&I Products.

Closing

Jeans closed the meeting and thanked everyone for attending.

Next meeting: Wednesday, May, 11 2016, 2 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
March 3-4, 2016**

IRS Staff

- Cedric Jeans – Designated Federal Office
- Otis Simpson – Program Analyst, TAP
- Linda Rivera – Senior Program Analyst, TAP
- Tamikio Bohler – Program Analyst, W&I
- Tamara Birts – Program Analyst, Systemic Advocacy

TAP Members

- Josiah Berry – Greenwood, IN-present
- Richard (Kent) Christensen – Boise, ID – present
- David Thies – Alton, IL – present
- Scott Wallace – Zephyr Cove, NV – present
- Jon Lumbra – Holyoke, MA – present
- Holly Hoffman – Amherst, WI – present
- Randy William – Memphis, TN – present
- Chardea Murray – Jacksonville, FL – present
- Kelly Hanssen – Austin, TX – present via phone
- Jamelda Fulton – Greenville, MS – absent
- Dawn Basciano – Sacramento, CA – absent
- Dara Hackett – Philadelphia, PA – absent

Member(s) of the Public

None

Opening/Welcome/Announcements

Cedric Jeans welcomed everyone to the meeting. Jeans then proceeded to discuss Administrative announcements and reviewed the agenda. Roll call followed by self-introductions of the staff and the TAP members.

TAP Mission

Jeans discussed the TAP Mission with the TAC Members. He also briefing informed the members to review the Ethics and Volunteer Agreement. The agreements were signed by all new members and secured for retention.

Icebreaker

Otis Simpson shared an icebreaker with the TAC committee.

Mentoring Program



Linda Rivera gave a quick overview of the guidelines for the Mentoring Program. Rivera then verified with the new TAC members that they had been in contact with their assigned mentor. For those that attended face to face (F2F), they were able to personally meet their mentors for the first time.

Chair and Vice Chair Roles and Responsibilities

Simpson gave a quick presentation of the roles and responsibilities of the TAC Committee Chair and Vice Chair.

Chair and Vice Chair Nominations

Nominations were held for TAC Committee Chair and Vice Chair. Each Nominee was given a chance for a quick one minute presentation. TAC nominees were as follows:

TAC Chair Nominee

Kent Christenson

TAC Vice-Chair Nominee

Chardea Murray
Josiah Berry

TAC Election Results

All members presented voted included a call in member who emailed their nomination and vote. TAP Staff counted and validated the ballots. Simpson announced the newly elected TAC Chair and Vice-Chair, as follows:

TAC Chair Elected

Kent Christensen

TAC Vice-Chair Elected

Chardea Murray

Approval of the Minutes (November – 2015)

The minutes were moved forward with the agreement that the minutes would reflect that Josiah Berry attended the November meeting. Christensen, the new chair, requested approval of the Minutes. The minutes were approved pending the editorial change.

Ground Rules & Phone Etiquette

Simpson reviewed the phone etiquette and ground rules for meetings. He advised to be respectful of staff, Subject Matter Experts (SME)'s, and IRS staff on the calls.

Emphasis were stressed on meeting quorum, and Simpson described that quorum consists of 50 percent plus 1. Based on current membership, the TAC committee must have seven members to meet quorum.



Activity Reports

Rivera discussed how to report time utilization for TAP Activities. TAC members must log all their time, which includes reading emails, outreach, committee meetings, etc. Rivera explained the activities reports are used to calculate the number of hours needed to receive the Presidential Volunteer Award.

The TAC members were advised and reminded that reports are due on the twenty-fifth day of each month. Jeans demonstrated how to use the Activity report.

Screening an issue

Jeans did a quick overview of screening an issue. Jeans explained that every issue is initially screened by staff and issue meeting TAP criteria is sent to the full committee for appropriate next action. The staff explained the role of the screening committee, who is designated to determine whether the issue falls within current scope of committee work and does it meet the criteria of a project.

New Issue Screening Report

A formal current screening report was not furnished at F2F to the TAC committee. However a live example was shared with the committee as an exercise. Simpson explained there will be a new report provided during the first screening committee meeting.

Establishment of the TAC Committee Meeting dates and time

The establishment of the committee meeting dates and times was discussed with all members present. The committee agreed to the following meeting dates and time:

TAC Full Committee Meetings

Second Wednesday of each month 2-3 p.m. (EST)

TAC Sub-One Committee Meetings

First Thursday of each month – 2-3 p.m. (EST)

Team Members – Jon Lumbra (Lead), Scott Wallace, Holly Hoffman, Dawn Basciano, Kent Christensen.

TAC Sub-Two Committee Meetings

First Thursday of each month – 3-4 p.m. (EST)

Team Members – Josiah Berry (Lead), David Theis, Randy Williams, Chardea Murray, Dara Hackett, Jamelda Fulton.

Screening Call Meetings

Ad Hoc Meeting

Team Members – Kent Christensen, Scott Wallace, Jon Lumbra, Holly Hoffman.

Internal Communications



Meeting dates will be established by the Taxpayer Communications Committee Team Members- Holly Hoffman, Chardea Murray.

Quality Review – Ad Hoc Committee

Ad Hoc Meeting

Team Members- Randy Williams, Jon Lumbr, Josiah Berry.

2016 Project Committee Focus and Reviews

A new project focus was shared, and each subcommittee was provided projects to work.

TAC Sub-One Committee

This committee broke out and was tasked with working on VSD, and improving lines at the TAC Offices. The IRS responded to one of the previous referrals and the committee reviewed the response for concurrence. It was determined the IRS agreed to the recommendations and the committee concurred. However the committee decided to add another row on the flyer to address LITC. Bohler recorded the added recommendation and the committee finalized the language going forward.

The committee also discussed TAC long wait times, cash payment acceptance, the appointment process and getting transcripts. The discussion led to the committee developing new projects around exploring more option to communicate the “Hate to Wait” flyer.

TAC Sub-Two Committee

The team broke out and discussed ways to improve the VITA Tax Return processing.

Project Focus Group

Future State of IRS presentation given by Jeans. Jeans explained that a number of changes are slowly underway at the IRS and more are under consideration. Members were informed that the IRS plans to take advantage of the latest technology to move the entire taxpayer experience to a new level with the efficient and effective manner while respecting taxpayer rights. Jeans shared a mock vignette of the future state for individual, small business/self-employed, and Large Business. Future state is located on www.irs.gov.

Vignette Review

The 3 vignettes were discussed by the committee as a whole.

Committee members discussed and answered the questions for their review:

- What was your initial reaction?
- Does the vignette accurately describe the flow of the taxpayer interaction being described?



- Give feedback on how should the vignette be changes when issues are complex and not resolved through self-help methods.
- How do the vignettes address taxpayers that do not fit into the “Future State” vignettes?
- Does anything give you concern with the vignettes?
- Do you have suggestions for the vignettes?

The Committee suggestions and comments for all of the 3 Vignettes were captured on individual spreadsheets. The vignette responses will be consolidated by staff and elevated to the National Taxpayer Advocate. The staff will also load the consolidated response on TAPSpace for members.

Systemic Advocacy Program Update

Tamara Birts provided an update to various initiatives and issues recently received in Systemic Advocacy. Birts explained how TAP and SA share the same goals and she will share updates periodically at committee meetings.

Meeting Assessment/Next Steps

Simpson validated committee contact information. Simpson also explained the when business cards and badges will be sent.

Recurring meetings (full and subcommittee) have been established. Members are currently working on pending items. Committee documents were be added to TAPSpace and members were encourage to use the site to interact with each other. It was explained when sending emails be sure to send to all subcommittee members, with a carbon copy (cc) Simpson, and Jeans.

Closing

Jeans thanks everyone and mentioned a survey about the F2F experience will be sent shortly. The meeting was adjourned.

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