



**2018 Meeting Minutes
Taxpayer Assistance Center (TAC) Project Committee**

- **March 22-23, 2018**
- **April 17, 2018**
- **May 15, 2018**
- **June 19, 2018**
- **July 17, 2018**
- **Aug. 21, 2018**
- **Oct. 16, 2018**
- **Nov. 20, 2018**

**Taxpayer Assistance Center (TAC) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
March 22-23, 2018**

Designated Federal Officer

- Susan Jimerson Seattle, WA Chief, TAP West

Attendance

- Vahagn Aganikian Salt Lake City, UT Member
- Kimberly Clark-Robinson Bear, DE Member
- Tasheka Dorsey Darrow, LA Member
- Gary Hoff Hot Springs Village, AK Member
- Holly Hoffman Amherst, WI Member
- David Jones Flower Mound, TX Member
- James “Jim” Sowell Panama City, FL Member
- Kathryn Tracy Buckeye, AZ Member
- Richard (Kent) Christensen, 2017 TAP Chair, assisting with transitioning to 2018

Members Attending Virtually

- Joseph “Joe” Holley Barboursville, WV Member

Staff

- Matthew O’Sullivan Oakland, CA TAP Analyst
- Lisa Billups Dallas, TX TAP Analyst
- Gilbert Martinez Austin, TX TAP Analyst
- Annie Gold Houston, TX TAP Secretary



- Gary Lindsey Atlanta, GA W&I Tax Analyst
- Johnetta Royster Atlanta, GA SPEC Analyst

Member of Public

- None

Opening/Welcome/Announcements

Jimerson welcomed everyone to the meeting. This is the first official meeting for S Taxpayer Assistance Center (TAC) committee in this TAP year 2018. Went over agenda. She then announced that member Kathleen Creggett has resigned. Introductions of staff and members followed the announcements.

Jimerson covered the TAP Mission – PowerPoint presentation.

TAP Member Procedures – Gilbert Martinez

Ground rules; members to be respectful, make specific suggestions; share information; all member participation; attack problems not people; okay to disagree; build a solid team; no sidebar conversations; one person at a time; put phone on mute when not talking; reach an agreement; consensus; meeting minutes and minutes approval process; establish meeting quorum; telephone and email etiquette; timeframes should be in the subject line; review and be prepared for meetings by referring to TAPSpace for required pre-reads; turn in Activities Reports on time; a lot of communicating by email and some by phone; tools: WebEx & TAPSpace; on calls please state your name when talking; please notate when emails need urgent attention in subject line and/or call us; attending calls is very important – notify us when you cannot attend a call and/or meeting;

Annie Presentation – Building logistics.

Chair Presentation

Martinez and Jimerson presented information about the chair and vice-chair of the TAC committee as well as subcommittee leads. Chair elections followed the presentation. Holly Hoffman nominated David Jones for Chair, he accepted the nomination. David Jones was elected Chair. Gary Hoff nominated Joe Holley as Vice Chair, he accepted. Joe Holley was elected Vice Chair. David Jones took over the meeting as he is now the Chair.

Minutes Approval

The minutes from the Nov. 14, 2017 Committee meeting were reviewed. The minutes were accepted as written.

No Public Comments

No representative from public present today.

Meeting Dates and Times



Described Quorum (5 min) and Consensus (majority rules)

Full Committee Schedule - Third Tuesday of each month at 4:00 - 5:00pm EST

Subcommittee 1 Schedule – Second Wednesday 4:00pm EST
(Issue 36597 Pro Bono Assistance & VITA/TCE Product Review)

Subcommittee 1 Members:

Gary Hoff (Lead)
Tasheka Dorsey
David Jones
James Sowell
Kathryn Tracy

Subcommittee 2 Schedule – Second Tuesday 4:00 PM EST
(Issue 35423 - Certified Acceptance Agent; Issue 36605 - Utilization and Effectiveness of Remote TAC Locations; Issue 36604 - TAC Office Security Guard "Gatekeeper")

Subcommittee 2 Members:

Vahagn Aganikian (Lead)
Kimberly Clark-Robinson
Holly Hoffman
Joseph Holley

Activity Reports due the Twenty-fifth of each month

Screening Committee Schedule – Meet as needed

New Issue Screening Team

Tracy, Dorsey, Hoff, Vahagn

Quality Committee Schedule – Meet as needed

Quality Review Team

Clark-Robinson and Kathryn

Outreach Committee – Joseph Holley (TAC Vice Chair)

Schedule: TBD

Internal Communication Committee

Jim Sowell and Joe Holley

Internal Communications Committee Schedule – TBD

Wage and Investment (W&I) General Program Overview by Gary Lindsey

- Lindsey was introduced and he provided additional information about himself.

- Lindsey helps supports all responses to TAP for Subject Matter Expert (SME) assistance and responses to recommendations.
- Role of W&I TAP Liaison, attend all Project Committee Calls – clarify and forward all TAP questions; identify SME within W&I; solicit W&I topics for TAP Review; monitor status for actions; attend annual TAP Meetings; share information regarding MSP Topics.

Recommendations from W&I Liason for FY 2018:

- Utilize our SMEs prior to the development of recommendations.
- Utilize the web for links to important data (previously shared with TAP).
- Notify us about upcoming conference calls in advance when requesting an SME.
- When submitting request for reconsiderations, please address the IRS response provided in the original recommendation. It helps if TAP explains why the current language is not sufficient. State what has changed or why the current response is unacceptable.
- Review IRS approved topics and if working across committees, please share information that the IRS shares with the other groups so that everyone has received all the input provided by IRS prior to working the topic.
- Be cognizant of our timelines. TAP has been doing a great job in this area:
 - 60 days to respond to W&I TAP Issues/Recommendations Submitted for IRS (W&I) to Consider
 - 30 days for requests for reconsideration
 - 30 days for general TAP questions
 - A few days (not designated) for finding W&I SMEs
- Use the attached website links to research requested information. This is a great go to guide of requested information that I have noticed over the past 3 to 4 years from TAP.



Resource Links for
TAP Members (2018).

- Oh also, use the attached website links/file and conduct searches on topics being worked by TAP and pay attention to the following items listed on the form:
 - Future State: use that language to justify TAP recommendations
 - IRS Government Accountability Office (GAO) report– state what the IRS said it would do that supports the TAP Recommendation. It is kind of difficult to reject a recommendation that addresses what we said we would do
 - Hot News– show that the TAP Recommendation (when appropriate) is obviously an issue that the IRS needs to address
 - IRS statements and announcements– Read and conduct searches on TAP topics to see our latest statements that may support or justify the recommendation being developed by TAP



I think all of this will strengthen the TAP recommendations – from W&I Liaison.

TAC Appointments Presentation by Field Assistance Director Susan Simon

Presentation by Susan Simon Field Assistance Director to discuss the TAC appointments process. Appointments are not required for non-cash payments, filing current year returns or picking up forms. Same day appointments may be made for hardships. Same day appointments may be made if there is staffing available, but taxpayers will be advised to make an advance appointment in the future. The taxpayer would have to wait until someone is available.

Subcommittee 1 Holly Hoffman reporting out on a TAC manager survey done last year. The information is on TAPSpace & will be forwarded to the committee. Overall the managers and customers do like the appointment system. However, there is still room for improvement.

VITA/TCE Product Review Presentation by SPEC Analyst by Johnetta Royster

Volunteer Income Tax Assistance and Tax Counseling for the Elderly (VITA/TCE) Product Review Presentation by Johnetta Royster Stakeholder Partnerships, Education & Communication (SPEC) analyst. Primary Training Products. Form 6744, Publication 4491, *Tax Law Training Guide*. Publication 4012, *Volunteer Resource Guide*. She is asking TAP's support to review and advise on these items. She would also like TAP assistance in determining the impact of tax reform on these products. Also asking for feedback for improving the Link & Learn tax certification program. TAP could also provide support develop strategies to help transition volunteers to electronic product delivery. The Pubs 4491 & 4012 are scheduled to be reviewed in the next couple of months. They are asking for TAP assistance and to receive a response by May 1, 2018. If not able to complete by May 1, 2018, there will be a second review by June 1, 2018. She will send her notes on this subject to Gilbert Martinez. (The staff analyst for TAC).

Martinez indicated that he had solicited volunteers from the other committees to help with the review. There were six members of other committees who volunteered to assist. Cheryl Williams Special Projects (SP) Sue Wennermark (Notices) Stephen Vanderver (Toll Free), Kristen Petersen (SP), Felicia Horton (Notices). Ruth Tsujimura (TCC). Jones will contact Horton and Williams. Kathryn will contact Wennermark and Tsujimura. Sowell will contact Petersen and Vanderver. Martinez will follow up with Royster to determine in detail the type of review wanted. Once Martinez gets clarification on what is wanted, he will provide details to the committee and then they can determine the specific course of action.

Project Committee Information

TAP Reviewing IRS Response **Issue 35283. ID 1005** Improved Signage at Taxpayer Assistance Centers. Per Holly Hoffman, they were looking to improve customer service by directing taxpayers who cannot be served at the TAC to web based solutions. Recommend attaching a plastic publication holder outside of TAC offices with a pub "Need Help Get Help" that is 8.5 by 11 inches advising taxpayers on how to get help on line. The IRS partially accepted the recommendation. They will not put it in a pub holder outside, they want to put it in the publication holder within the TAC. There is an issue in that General Services



Administration (GSA) makes the rules concerning the outside of the TAC offices. The concern here is that to get to a publication in the TAC, the taxpayer would have to go through security which defeats the purpose of wanting to post information outside of the office. The publication is being updated for 2018, therefore changing the name of an existing publication would be difficult. Committee voted to accept IRS response.

IRS Response **Issue 35283 ID 1006**. The committee voted to accept the IRS response.

Monitoring IRS action on **Issues 33415, 34969 and 35292**. Waiting for IRS to take the actions they indicated they would take by the date they indicated.

IRS responses to **Issues 34028 & 35999**:

There has been a response to **Issue 34028**.

Issue 34028 IRS response ID 1271. Universities not accepting transcripts without date stamps because some IRS offices date stamped transcripts and others did not. The suggestion was to create an Frequently Ask Questions (FAQ) page to provide information on what a valid transcript consists of. The IRS indicated that they are in discussion with the Department of Education to resolve this matter. Action will not be taken until those discussions have been completed. Committee voted to accept the IRS response.

Issue 35999 has not yet provided their response. They did request additional time to respond. Billups has sent a follow up request for a response from IRS, will follow up when response received.

Screening Report

Issue 36994 – How to Request Client Records from Fiduciary. Committee voted to drop the issue as outside the scope of TAP.

Issue 37067 – Any Years of Paying Taxes. Committee voted to drop issue as outside of the scope of TAP.

Issue 37061 – Excess Advance Premium Tax Credit. Drop issue as a legislative matter.

Issue 37108 – Federal Taxes. Drop as individual issue.

Issue 37112 – Issuance of an ID Protection PIN. Moved to Special Projects.

Issue 37118 – Path Act. Drop as outside of TAP scope as a legislative matter.

Issue 37151 – Sorry...we do not have your 8K. Drop issue advise Taxpayer (TP) to Contact the Local Taxpayer Advocate (LTA).

Issue 37159 – Reform I needed Major, I was promised a date to be. Drop issue as outside the scope of TAP.



Issue 37187 – No acknowledgement of explanation OR my payment. No contact info provided. Drop issue.

Issue 37188 – Received letter 4464c. Individual account issue and a legislative issue. Drop issue.

Issue 37196 – Tax questions This is an individual issue, issue will be dropped. However, as there is a complaint about an advocate employee, the matter will be referred to the TAP Director to contact the appropriate IRS office.

Parking Lot:

Issue 36604 – Security Guard Gate Keeper Issue.

Issue 36605 – Utilization and Effectiveness of Remote TAC locations.

These items will be reviewed by Subcommittee 2 to determine any appropriate next steps. Wrap up, screening completed, subcommittee assignments completed.

March 23, 2018 - Meeting

The day started with a tour of the TAC office led by the TAC Manager James Matlock. Annie Gold advised the committee on the process of submitting any needed documents to verify travel expenses and the process for submitting expense reports.

Subcommittee break out groups. Subcommittee 2 TAC Certified Acceptance Agents Aganikian, Holley, Hoffman & Clark-Robinson. Aganikian is the subcommittee lead. **Issue 35423** Identity Theft. **36604** security guard gate keeper issue. **36605** Utilization and effectiveness of remote tac locations. They are also considering opening an issue on transcript issues. They want to get more information before deciding. Each TAC has different issues. In New Mexico, there was an issue because a lot of colleges were sending folks to the TAC to get transcripts. In Houston, the problem was that people could not pass validation, some folks to not have cell phones in their own names.

Aganikian was asking re ID theft **35423** can TP go to Police Station to verify ID? This is not practical. Could TP go to a bank or a Notary to verify ID? TPs can go to the Post Office to verify ID for a passport, why can't the same principle apply to IRS ID verification? There is already a Certified Acceptance Agent (CAA) process for ITIN verification, why not apply it to ID Theft Issues?

The committee had the following questions:

- 1) What documents are requested?
- 2) How long does it take?
- 3) What are the concerns about the CAA process?
- 4) Is there a hold on the process?
- 5) What is the cost to the TP?



Could the IRS do a verification process based on asking for verification of items on tax returns that took place prior to any identity theft? This could be a problem for people who have moved around a lot and/or did not keep copies of prior returns. If the taxpayer answers one question wrong, is there an alternative question that could be asked? They want to get current information on exactly what verification questions are being used now.

What authority do the CAAs have, how does someone become a CAA?

What are the risks of extending the CAA program to include ID Theft cases?

The time frame to expect to get responses from SME is about 4 weeks. The subcommittee will review and compile questions Aganikian will send the final list of questions to Martinez. If someone's wallet is stolen & they do not have regular ID documents, what alternative documents will be accepted. A follow up check will be done to the Internal Revenue Manual to determine what would be acceptable. There is also a question concerning interpretation services for non-English speakers. How do we educate people concerning how to deal with this process? The problem with some of the Spanish speaking TPs is they may use the services of organizations that are not available year-round, so when they get contacted outside of filing season they will need to come directly to IRS to get help in responding to any notices received.

Issue 36604 – Security Guard Gatekeeper at TAC. The issue is that TPs come to the office and are turned away by the security guards because they do not have an appointment. The issue is that the guards are contracted by the (GSA). It should be determined what the discussions between GSA & IRS. There should be adequate signage at the building explaining the requirements for making an appointment. There are some services that do not need an appointment, but security may not know that. The process is not consistent from office to office. The TAC managers do not have the authority to direct the security guards. There needs to be clarification on the role of the security guards in different IRS locations. The committee will send follow up questions to Martinez to send to IRS to find out the status of this issue and see how to further pursue it.

36605 Utilization and Effectiveness of Remote Locations. Need to request current statistics on this matter. The program has been suspended but we need to determine for how long it will be suspended. The offices are located at US Embassies overseas.

Sub Committee Report Out

Subcommittee 1 Gary Hoff. Working on VITA/TCE Product review. Tracy is working on this. There are six from other committees that will assist on this. Will discuss on April 11, 2018 meeting. The other issue is the proposal for Pro Bono assistance, **Issue 36597**, in the non-filing season. The concern is whether this will get shut down.

Sub Committee 2 Aganikian. Their issues are detailed above.

- **Issue 36604** – TAC Office Security Guard "Gatekeeper"
- **Issue 36605** – Utilization and Effectiveness of Remote TAC Locations



- **Issue 35423** – Certified Acceptance Agent; Martinez submitted a request to Tamikio Bohler to get an SME to answer questions

Martinez discussed the closing out of the transcript issue. However, there are still other aspects of this matter. He proposed to write up a new issue to address other aspects of this issue, to look at it from the perspective of more third parties, not just college financing matters.

Meeting Adjourned

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



**Taxpayer Assistance Center (TAC) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
April 17, 2018**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer

Members Present

- Vaghan Aganikian Member
- Kimberly Clark-Robinson Member
- Tasheka Dorsey Member
- Holly Hoffman Member
- Joseph Holley Vice Chair
- David Jones Chair
- James Sowell Member
- Kathryn Tracy Member
- Sue Wennermark Guest

Members Absent

- Gary Hoff Member

Staff

- Terrie English, TAP Director
- Susan Jimerson, Chief TAP West
- Lisa Billups, Program Analyst
- Antoinette "Toni" Ross, Program Analyst
- Gilbert Martinez, TAP Analyst
- Tamikio Bohler, W&I
- Sheila Stevens Brown, W&I
- Annie Gold, TAP Administrative Assistant

Member of Public

Eric Griffiths from Seattle, WA

Roll Call

Quorum was met

Opening/Welcome

Susan Jimerson welcomed everyone to the meeting. Terrie English, TAP Director could not be on the call. Jimerson shared the National Office Report in her absence. The recruitment period has begun and will run through April 27, 2018. Members and alternates are being recruited from the following states: Alaska, California, Hawaii, Kentucky, Massachusetts, Michigan, New Hampshire, North Dakota, New York, Oregon, Pennsylvania, Rhode Island, Texas, Vermont



and Wyoming. In addition to these states alternates will be sought in Colorado, Washington DC, Delaware, Kansas, Ohio, South Dakota, Virginia and Washington state. Solicitations have been sent out to members for participation on the Interview Panel. The Interview panels are made up of one TAP member and one TAP staff person. The member would represent the TAP member view of what goes on in the TAP interview process. The interviews will begin June 4, 2018 through June 29, 2018. The hours are 8:00 a.m. to 5:00 p.m. EST. Members who are interested in participating in one or more slots should send interest to Jimerson or the Gilbert Martinez. On April 6, 2018 Cedric Jeans sent out a solicitation for input on the TAP Face to Face (FTF) meeting in the form of a survey. Responses are due by April 25, 2018. All input is valuable. The information is used in planning for the next years FTF meetings. Members were encouraged to complete the survey. The Joint Committee's first meeting will be held on April 25, 2018 at 1:00 p.m. EST. A vote to determine a new date for the monthly Joint Committee calls will be conducted. Members are encouraged to call and listen in on the meeting. The 2017 TAP Annual Report has been sent out to each member. Let the analyst know if you do not receive it in the mail. Toni Ross sent out the invitation for the Internal Communications Committee calls. The first meeting is scheduled for April 24, 2018.

Chair Report

David Jones stated Joseph Holley, the committee's Vice Chair will be included in the invites to all pre-meetings. He welcomed everyone to the call. The committee came together well during the FTF meeting in Houston, TX. The meet and greet sessions went well. Members will receive clarification on their roles working on the Volunteer Income Tax Assistance Program/Tax Counseling for the Elderly (VITA/TCE). He commended the TAP Staff on the minutes from the FTF meeting.

Approval of Minutes

2018 FTF minutes approved with corrections

Public Comments

Eric Griffiths commented on the virtual VITA sites being set up across the country. He explained his interest in improving the VITA program. He spoke with the person over Utah. That person is targeting the rural areas that do not have the available sites or volunteers. The software compatible for the program is an issue. He asked if IRS could come up with some best practices and guidance for all the materials used would be helpful. Recruit partners who are not geographically limited. Extend the filing for individual who don't fix into the norm in completing their returns. He stressed the need for more centralized process needed with VITA sites, the availability of volunteers, and the costs of the returns should be at a lower rate. He would like feedback from sites who have tried it in the past and any information available to make the process more efficient. Jimerson requested documentation be provided for further research to provide feedback and to determine how the issue will be worked.

Subcommittee Updates

Jones provided an update on **Issue, 35999 Improve the Awareness of Utilization of Online Tools**. Three responses have been received since the FTF meeting. IRS decision is not to adopt any of them. They are still waiting for a response on the fourth recommendation. Jones



recommended the committee table this agenda item for the next meeting. All members will have received copies for full discussion.

Subcommittee I

Gilbert Martinez stated the VITA/TCE Project Review clarification was received. Kathryn Tracy stated a review was done on the material from Stakeholder Partnerships, Education & Communication (SPEC). They have put a team together and request four TAP members and TAP Staff to assist.

- Publication 4012 VITA/TCE, *Resource Guide* (David Jones)
- Publication 6744 VITA/TCE, *Volunteer and Task Team* (Kathryn Tracy)
- Publication 4491 VITA/TCE, *Training Guide* (Cheryl Williams)
- Link and Learn Task Force, *IRS Online* (Sue Wennermark)

An email was sent out to members of the subcommittee for volunteers to be on one of the four task teams. There will be a subcommittee meeting on April 19, 2018. There is a total of 120 to 160 hours of commitment. Tamikio Bohler added review has always been done. She expressed her appreciation to TAP allowing them the opportunity to be involved and their input. Martinez requested verification be shared on representative attendance to the committee meetings.

Jimerson asked the Program Owners the following questions:

- When will the teams begin?
- Will there be a premeeting?
- Will everyone know what their assignments are?
- Will it be virtual participation or travel?

Members names and document numbers should be submitted to John Adder Royster. Members are to provide this information to Martinez to be forwarded to Royster.

Subcommittee 2

Vaghan Aganikian stated they are working three issues:

- Issue 36604, TAC Office Security Guard "GateKeeper"
- Issue 36605, Utilization and Effectiveness of Remote TAC Locations
- Issue 35423, Certified Acceptance Agent

They have reviewed information they had previous and information that has been supplied to them. They are waiting on additional information to make their decision and to speak with a Subject Matter Expert (SME). Martinez added he will work with Matthew O'Sullivan on Issue 35423 as it deals with Identity Theft to prevent duplication with Special Projects issue they are working on.

Outreach Report

Holley encouraged members to get out and meet face to face with co-workers' businesses and associations. People are receptive to the messages from TAP. He added he met with a special force consisting of 50 individuals. They were interested in hearing what TAP had to say and how they could be helped in the process. Martinez reminded members to submit their Activity Reports. Send the reports to Martinez, Holley and a copy to TAP email address. Any questions



or if assistance is needed contact Martinez. The Activity Reports are due the twenty-fifth of the month. Jimerson stressed the negative reports are needed. Make sure credit is given for the work being done. Holly Hoffman added the Problem-Solving Days are good Outreach activity to participate in. She will be participating in the Problem-Solving Days held in Wisconsin. The Local Taxpayer Advocates (LTAs) information is available by contacting Martinez.

Action Items:

Martinez will follow up with the following action items:

- Contact members of the Screening committee to assign the 8 issues.
- Send out responses 34999 to the committee.
- Follow up with Bohler and IRS on providing VITA/TCE meeting for travel.
- Add Griffiths' issue into Systemic Advocacy Management System (SAMS).

Closing

Susan Jimerson closed the meeting.

**Next Meeting: Tuesday, May 15, 2018
4:00 PM EST, 3:00 PM CST, 2:00 PM MST, 1:00 PM PST**

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



**Taxpayer Assistance Center (TAC) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
May 15, 2018**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer

Members Present

- Vaghan Aganikian Member
- Joseph Holley Vice Chair
- Gary Hoff Member
- David Jones Chair
- James Sowell Member
- Kathryn Tracy Member

Members Absent

- Kimberly Clark-Robinson Member
- Tasheka Dorsey Member
- Holly Hoffman Member

Staff

- Terrie English, TAP Director
- Susan Jimerson, Chief TAP West
- Lisa Billups, Program Analyst
- Gilbert Martinez, TAP Analyst
- Tamikio Bohler, W&I
- Annie Gold, TAP Administrative Assistant

Member of Public

None

Roll Call

Quorum was met

Opening/Welcome

Susan Jimerson welcomed everyone to the meeting. WebEx is unavailable due to maintenance being done. Members will be notified when it is up and running. The Recruitment Period closed on May 11, 2018. The applications are being ranked by www.usajobs.gov to establish the best qualified applicant. The Administrative Staff will begin sending out information for applicants to enter their choice for Interview slots. Fred Smith is the lead analyst for the Interview Panels. He will be putting a list together of panel members There will be additional information going out to members who have already volunteered to be a part of



the panel. Members were encouraged to participate on the Interview Panels if they have not done so. Interviews are tentatively scheduled to begin June 4, 2018 and continue to June 29, 2018. Hours are between 8:00 a.m. EST and 5:00 p.m. EST. More information to come.

The All TAP Quarterly Meeting will be held May 24, 2018. It will begin at 2:00 p.m., EST. There has been a change in the Joint Committee (JC) Meeting dates. It will no longer be held on the last Wednesday of the month. It is scheduled for the last Thursday of each month going forward beginning at 1:00 p.m., EST. The next JC Meeting is for May 31, 2018. Members are encouraged to attend the call. The JC is made up of the TAP Chair, TAP Vice Chair, and the Chair of each project committee and Internal Communications Committee (ICC). They are the voting members of the committee. ICC held their first meeting on April 24, 2018. They are working on the first Newsletter of TAP for this year. It is expected to be released by the end of the week. Their next scheduled meeting will be held on May 22, 2018 for members interested in attending.

National Office Report – Terrie English

Terrie English welcome everyone to the call. The JC Chair persons will have their Face to Face meeting in July. It will run July 9, 2018 until July 12, 2018. There will be more information sent out to everyone about the meeting.

Chair Report – David Jones

David Jones stated he attended both subcommittee meetings earlier this month. Both committees are making great progress. He also attended the JC's meeting. It was very well attended and represented by the TAP Staff and other IRS employees. He added members are ready to make this a great TAP year.

Approval of Minutes

April 17, 2018 minutes approved.

Public comments

None

Issue Update

Jones stated Issue **35999, Improve Awareness on Utilization of Online Tools.**

- There were three recommendations: The proposed change to Get Transcript.
- The proposed change to View my IRS account.
- What's the status of my amended return.

IRS rejected all three. Jones reviewed IRS responses with the Full Committee.

Decision: Full Committee Consensus Accept Non-Adopt Recommendation on Issue 35999.

Program Owner Report – Tamikio Bohler



Tamikio Bohler stated a response was sent on Issue 35999 to Gilbert Martinez on Direct Pay. Martinez added he would review and forward to the committee for review and discussion.

Subcommittee Updates

Subcommittee 1

Kathryn Tracy stated there are multiple members joining the subcommittee. They are reviewing the products assigned. David Jones added the subcommittee will be meeting Tuesday, Wednesday and Thursday of this week. They are using the 4012 Volunteer Assistant Guide to review. They are looking at how the new tax law will be incorporated in the 4012 Guide. He was informed of a 4491-meeting held on last month. Gary Hoff added the discussion on the Pro Bona Issue. This issue stems from IRS not accepting tax questions over the phone line after

April 17, 2018 the filing deadline. The subcommittee looking to see if private practice or practitioner willing to take the calls. IRS stated the policy has been changed. There would be a tax manager to answer the questions. The subcommittee suggested to drop this issue.

Subcommittee 2

Vaghan Aganikian stated

- **Issue 36604, TAC Office Security Guard** has been addressed by IRS. The security guard's jobs are in security and not IRS tax issues. The subcommittee recommends closing this issue.
- **New Issue to be added – review Form 15006, How to Schedule an Appointment** with field Assistants and address services not needing an appointment.
- **Issue 36605, Utilization and Effectiveness at Remote TAC Locations.** The subcommittee is reaching out to the Subject Matter Expert (SME) to find out how the remote locations are utilized. This issue is active and the subcommittee will continue work on the issue.
- **Issue 35433**, Subcommittee recommended to have this issue assigned to Special Projects committee.

Screening Report

The Screening Committee met and there are thirteen Issues with three of them being accepted and ten issues were dropped.

- **Issue 36947**, Problems with Turbo Tax. **Drop**
- **Issue 37214**, Personal issue. **Drop**
- **Issue 37292**, Banking Issue. Not a TAP issue. **Drop**
- **Issue 37298**, Personal issue. **Drop**
- **Issue 37299**, Problem with Delayed Refund and Notification vague and confusing; revenue protection action - flaws in data mining? Waited 120 days for return. Subcommittee will work this issue. **Accepted**
- **Issue 37300**, Long wait time on Hold. Budget issue. **Drop**
- **Issue 37316**, Tax Law Legislative Issue. **Drop**
- **Issue 37339**, Submitter needed a transcript. **Drop**



- **Issue 37348**, 1099 Miscellaneous Statement, Not a TAP issue. **Drop**
- **Issue 37360**, Tax Refund Delays and Confidentiality. Taxpayers could over hear conversations. Subcommittee will work this issue. **Accepted**
- **Issue 38411**...Delays in Refunds. Subcommittee will work this issue. **Accepted**
- **Issue 38443**, Individual issue. **Drop**

Decision: Full Committee Consensus to accept the Screening Committee's reports accepted as submitted.

Martinez added the three issues to be worked will be assign between Subcommittee 1 and Subcommittee 2 depending on the nature of the issue.

Outreach Report

Joseph Holley stated there are nine sections within the Newsletter. He received submission on 89 percent done. The Outreach Summary is still not in. He needs to find out who has the report. Tracy asked who to submit new issues to. Martinez stated members should send an email or submit the form to him. Jimerson stated the Business cards have been ordered and received. They will be sent out shortly.

Action Items:

Martinez will follow up with the following action items:

- Send out the fourth recommendation to full committee
- Make sure the VITA recommendation to subcommittee 1
- Issue 37299, accepted - look to see how to make better
- Issue 37360 accepted
- Issue 38411, accepted
- Add assignment of Issues to work to next month's meeting Agenda
- Contact submitters of dropped issues and inform them of status

Closing

Susan Jimerson closed the meeting.

**Next Meeting: Tuesday, June 19, 2018
4:00 PM EST, 3:00 PM CST, 2:00 PM MST, 1:00 PM PST**

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



**Taxpayer Assistance Center (TAC) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
June 19, 2018**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer

Members Present

- | | | |
|-----------------|-------------------------|------------|
| • Joseph Holley | Barboursville, WV | Vice Chair |
| • Gary Hoff | Hot Springs Village, AR | Member |
| • Holly Hoffman | Amherst, WI | Member |
| • David Jones | Hickory Creek, TX | Chair |
| • James Sowell | Panama City, FL | Member |
| • Kathryn Tracy | Buckeye, AZ | Member |

Members Absent

- | | | |
|---------------------------|-----------------|--------|
| • Kimberly Clark-Robinson | Taylorville, IL | Member |
| • Tasheka Dorsey | Darrow, LA | Member |

Staff

- Terrie English, TAP Director
- Susan Jimerson, Designated Federal Officer
- Lisa Billups, Program Analyst
- Gilbert Martinez, TAP Analyst
- Gary Lindsey, W&I
- Annie Gold, TAP Administrative Assistant

Member of Public

None

Roll Call

Quorum was met

Opening/Welcome

Jimerson welcomed everyone to the meeting. The Recruitment period has one more week remaining to finish up the interviews. The last day has been set for June 29, 2018. There is the possibility of it being push back further. The interviews have been going very well.

- The Outreach Committee meeting is scheduled for June 21, 2018 beginning at 3:00 p.m. ET.



- The Internal Communications call is scheduled for June 26, 2018 beginning at 2:00 p.m. ET
- The Joint Committee (JC) Full Committee meeting will be held on June 28, 2018. Members are encouraged to join in on the call.
- The JC's Face to Face Planning Session will be July 10 -11, 2018 beginning at 8:30 a.m. to 5:00 p.m. ET. Members were encouraged to join in and listen. Information will be sent out to members for the call.
- The Tax Withholding Calculator Focus group has completed the task from the discussion held on June 14, 2018. The comments results have been added in an Executive summary and will be provided to Nina Olson, National Taxpayer Advocate. An update will be posted onto www.TAPSpace.org

National Office Report – Terrie English

English thanked each member who participated on the Form W-4 Tax Withholding Calculator Focus group and for all the hard work that has been done. English participated in a conference call with Communication Stakeholders Liaison and Online Services (CSO) this morning. They are in the process of doing the tax reform site. Members have been asked to participate on a call scheduled on tomorrow, June 20, 2018. The call will begin at 12:00 p.m. ET. Members feedback is needed on how the site looks and individual opinions on the site. Feedback can be provided by sending an email message. Kevin Brown sent a message to each member with the information and how to submit the requested feedback. The webinar will be shared for members to view. As many members are encouraged to participate if possible.

Chair Report – David Jones

Jones thanked everyone for being on the call. Special thank you to Joseph Holley for attending the JC meeting last month in Jones' absence. Jones did attend the committees and subcommittees meetings and was happy to see how the members are engaged. The TAC started out with 11 members. Due to reassignment and resignations the committee now has eight members remaining. Discussion to combine the two subcommittees into one working group is on the agenda for today's call. Jones participated at an outreach activity two weeks ago where he met Bridgett Roberts, Deputy National Taxpayer Advocate. During her presentation TAP was mentioned and she thanked TAP for the work being done. Members were reminded to submit their Activity Reports in on time.

Approval of Minutes

May 15, 2018 minutes approved with corrections.

Public comments

N/A

Issue Update

Jones stated during the meeting held on May 4, 2018 the Screening Committee agreed to look at three Issues. There will be more information shared during the Screening Report. The summarized report deals with Delayed Refunds, Notifications being confusing and confidentiality within the TAC offices.



Issue 35999, Improvement Utilization of Online Tools. The response sent out on May 16, 2018 is a partial adoption of the recommendation. IRS decided not to accept the name change. The alternative provided by IRS will be to change from Direct Pay to Direct Pay with Bank Account.

Decision: Full Committee Consensus accept IRS response

Combine Subcommittees into one working group

Jones stated it was researched in the Regulations and the committee is allowed to proceed with combining into one working group. There will be one meeting per month to discuss all the issues with the meeting date July 18, 2018 beginning at 4:00 p.m. ET. The remaining meetings will be held each second Wednesday of each month beginning at 4:00 p.m. ET.

Decision: Full Committee Consensus to change Subcommittees into one working group.

Program Owner Report

None

Subcommittee Updates

Subcommittee 1

Kathryn Tracy stated **Issue 38551, VITA TCE Project Review** IRS agreed with the subcommittee to be on the committees already worked with rewriting Publication 4012. Tracy is rewriting the test Form 6744. There has been a good response for volunteers for the data testing. She is waiting on a response from Cheryl Williams on where she is on Publications 4491. Sue Wennermark recently found out who the SPEC point of contact person is. Jones will meet the third week in July with his group. Tracy added during July 17-19, 2018 and August 14-19, 2018 the groups will also be meeting.

Issue 38611, Taxpayer Transcript by Third Party the subcommittee is seeking a Subject Matter Expert (SME) to speak with. Information was sent out by Gilbert Martinez has four bullet points and questions submitted to the SME for their response. Martinez stated it will take a few weeks to get a response back and the Subcommittee will be notified. There were questions submitted to the committee during the Face to Face and Martinez asked if the committee would look at Tax June Issue Status Report the questions that have been submitted and the ones responses are needed back.

Subcommittee 2

Hoffman asked about the plan for Subcommittee 2 due to the combining of the subcommittees. The subcommittee appears to be behind in identifying the issues. Martinez suggested starting at the recommendation stage may be a good place to start. Jimerson added the subcommittee could work on the background, their project statements, the goals, etc. Some of these could be assigned to different members. Martinez stated the Subcommittee will begin working on



administrative items while waiting on responses to the questions. Members were encouraged to send any additional questions to Martinez to be added.

Screening Report

Tracy stated the Screening Committee had a good meeting. There were seventeen new issues reviewed. All were dropped except one of the seventeen.

Issue 38613, Placed in the Parking Lot. Additional research will be done to determine if it will be dropped, reassigned or worked. The remaining 16 issues dropped were individual or legislative issues.

Decision: Full Committee Consensus to accept the Screening Committee's reports accepted as submitted.

Outreach Report

Joseph Holley stated the TAC committee has attended ninety-three (93) events this TAP year. There have been eight new issues received. Six came in May. The audience reached has been remarkable reaching over 3600 people within six months. Members are complimented for getting out and doing the outreach activities. The Internal Communications Committee need articles. The deadline runs through June 25, 2018. They anticipate the Newsletter will be published by June 29, 2018. Currently, there are no submissions that have been turned in. Members are encouraged to submit their articles to the staff and Holley as soon as possible. The Newsletter is a good source to show what the TAC and TAP are doing. It is a good tool to use during face to face meetings with taxpayers.

Action Items

Martinez will follow up with the following action items:

- The JC is looking for any thoughts and or comments related to TAP or any other functions.
- Issues to carry over into next year the committee is working .
- Three issues identified in May are very good ideas.
- Moving the two subcommittees into one working group committee.
- July meeting will be on Wednesday, July 18, 2018 at 4:00 pm. ET.
- The working group committee meetings will go back to the second Wednesday of each month at 4:00 p.m. ET.

Jimerson added

- Turn in all Activity Reports.
- If members have not been in contact with their Local Taxpayer Advocate (LTA), let Martinez know who the LTA is and he will contact that person.
- Any questions let the staff know.
- Thanks to all members for all work being done.

Closing

Susan Jimerson closed the meeting.



**Next Meeting: Tuesday, July 16, 2018
4:00 p.m. ET, 3:00 p.m. CT, 2:00 p.m. MT, 1:00 p.m. PT**

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



**Taxpayer Assistance Center (TAC) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
July 17, 2018**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer (DFO)

Members Present

- | | | |
|------------------|-------------------------|------------|
| • Tasheka Dorsey | Darrow, LA | Member |
| • Gary Hoff | Hot Springs Village, AR | Member |
| • Holly Hoffman | Amherst, WI | Member |
| • Joseph Holley | Barboursville, WV | Vice Chair |
| • David Jones | Hickory Creek, TX | Chair |
| • James Sowell | Panama City, FL | Member |
| • Kathryn Tracy | Buckeye, AZ | Member |

Members Absent

- Kimberly Clark-Robinson Bear, DE Member

Staff Present

- Terrie English, TAP Director
- Susan Jimerson, Designated Federal Officer
- Lisa Billups, Program Analyst
- Gary Lindsey, W&I
- Annie Gold, TAP Administrative Assistant

Members of Public

None

Roll Call

Quorum was met

Opening/Welcome

Jimerson welcomed everyone to the meeting.

- The Joint Committee (JC) Strategic Planning meeting was held on last week. It was a very productive discussion. There were discussions on planning for next year.
- The Outreach Committee's next meeting is scheduled for July 19, 2018 beginning at 3:00 p.m. ET.
- Internal Communications Committee's next meeting will be July 24, 2018 beginning at 2:00 p.m. ET
- The JC will have their monthly scheduled meeting on July 26, 2018 beginning at 1:00 p.m. ET.



The Recruitment interview phase has been completed. The recommendations are currently being processed and will be forwarded to the TAP management staff for the next approval level. Background information is being put together for the applicants recommended for a member or alternate positions. Thank you was expressed to members who participated in the interview process for TAP year 2019. Lisa Billups gave an overview of the agenda.

Chair Report

Jones stated the JC met on last week in Jacksonville, FL. All six project leads attended the meeting. Jones participated representing TAC. Holly Hoffman, TAP Chair and Scott Hall, Vice Chair were there. The TAP staff represented by Terrie English, Jimerson, Cedric Jeans and other members of the staff. Sheila Andrews and Maryclaire Ramsey also attended the meeting. The JC discussed where TAP will be heading on next year. Members has been asked to revamp the TAP. Members were encouraged to volunteer to become a committee chair. The TAC full committee made the decision to go down from two subcommittees to one due to attrition and members having to drop off. The working committee will meet on tomorrow, July 18, 2018 at 4:00 p.m. ET.

Approval of Minutes

June 19, 2018 minutes approved with correction. The Chair Report stated the committee started with 12 but should be 11 and now down to 8 members.

Program Owner Report

Gary Lindsey stated there were no updates to report.

Public comments

None

Issue Status Update

Jones stated the last Screening Committee meeting was attended by Gary Hoff Kathryn Tracy, Gilbert Martinez and he also attended the meeting. There were 24 Issues discussed. Three were selected to move forward. One was placed in the Parking Lot, Martinez follow up on two and the remaining issues were dropped.

The three Issues the Screening Committee to move forward are:

- Issue 37299, *Refund Holds*
- Issue 37360, *Confidential information being overheard*
- Issue 38411, *Tax Refund Delay*

The issues may be combined due to overlap of issue concerns.

Decision: Full Committee Consensus move forward with Issues 37299, 37360 and 38411.

Subcommittee Working Group

Jones shared the following updates.

- Issue 38551, *VITA TCE Project Review* Kathryn Tracey participated during week one of the Form 6744 Volunteer Income Tax Assistance (VITA) Test Retest meeting. Now working on getting the beta test asking for volunteers for the 2018 Tax year. The second meeting for this committee will be held in three weeks.



- The committee Jones is on Publication 4012, *Volunteer guide*. The first meeting was held in May. The second meeting will be next week. Steve Vanderver will attend the meeting in Jones' absence.
- Form 4491 Cheryl Williams will attend the second week.
- Link and Learn project there has been no volunteer to agree to work this project.
- Issue 38611, *Taxpayer Transcript by Third Party* a request for extension was received for Friday, July 27, 2018. They are waiting for additional information from Martinez.
- Issue 36605, *Utilization of Remote service delivery program*. Hoffman put some information together and it was sent the committee members. Expansion requests have been made by several contacts. It was shared with the committee. Members were asked to share any additional information or questions.
- Issue 38550, *How to schedule an appointment a copy of F1506* was sent to members for review. Discussion will be done to see if additional information could be added and benefit the taxpayers.
- Send referral on low hanging fruit—setting appointment/placing a collection hold on accounts.

Outreach Report

Joseph Holley stated June was an active month. It has the second busiest month with the third highest audience. The message about TAP is getting out. Members were encouraged to use the Newsletter that is sent out to assist in outreach activities. Members were reminded to submit articles for the Newsletter. ICC committee has been asked to take on the task of rebranding TAP. Hoffman sent out information where Maryclaire Ramsey has charged panel members with rebranding TAP. TAP panel will work together on the logo, website presence, graphics, printed materials, brochures, social media plans etc. to update them. Put together a new brand to get noticed, a response from taxpayers to take action. Jones added TAP has not had a change in almost a decade. A new face to TAP to make it more visible. Jones encouraged members to continue to submit articles for the Newsletter. James Sowell attended the tax forum in Atlanta. It was very productive. There were 2000 people in attendance. They all saw the TAP booth. There were several people inquiring how to become a part of TAP. They were advised to go to the website. He asked if information would be provided to hand out. Billups suggested to contact Fred Smith and he would be able to provide some information to hand out on the background and awareness of TAP. Hoffman will be attending the tax forum in Chicago, IL on August 21-22, 2018.

Action Items:

Billups will follow up with the following action items:

- Update Issues 37299, 37360, 38411 to active status in Systemic Advocacy Management Systems (SAMS).
- Make the change to June's minutes and post to www.TAPSpace.org and send to Kevin Brown to post.
- Reminder to members to submit questions and or comments to Hoffman.

Closing



Susan Jimerson closed the meeting.

**Next Meeting: Tuesday, August 21, 2018
4:00 p.m. ET, 3:00 p.m. CT, 2:00 p.m. MT, 1:00 p.m. PT**

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



**Taxpayer Assistance Center (TAC) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
August 21, 2018**

Designated Federal Officer

- Lisa Billups Designated Federal Officer

Members Present

- | | | |
|-----------------|-------------------------|------------------|
| • Gary Hoff | Hot Springs Village, AR | Member |
| • Holly Hoffman | Amherst, WI | (National Chair) |
| • Joseph Holley | Barboursville, WV | Vice Chair |
| • David Jones | Hickory Creek, TX | Chair |
| • James Sowell | Panama City, FL | Member |
| • Kathryn Tracy | Buckeye, AZ | Member |

Members Absent

- | | | |
|---------------------------|------------|--------|
| • Kimberly Clark-Robinson | Bear, DE | Member |
| • Tasheka Dorsey | Darrow, LA | Member |

Staff Present

- Terrie English, TAP Director
- Gilbert Martinez, Program Analyst
- Kevin Brown, TAP Administrative Assistant

Members of Public

None

Roll Call

Quorum was met

Opening/Welcome – Lisa Billups

Billups opened the call and announced she is filling in behind Susan Jimerson who is on a different assignment outside of TAP. Billups spoke about the Joint Committee (JC) planning meeting from last month and thanked David Jones for his participation.

Please send any additional feedback to Jones to help improve TAC and TAP in general. Billups solicited the committee for volunteers for the 2018 Annual Report. Billups reviewed the agenda.

National Office Report

English reported that we are in the full swing of the recruitment process and we are finalizing the fingerprinting and tax checks. Once this is done the package will go to Nina Olsen, the



National Taxpayer Advocate (NTA). English also thanked those who recommended applicants who have been included in this year's package.

English encouraged members to consider leadership roles for next year and is looking forward to getting reports from members who are attending the tax forums.

Approval of Minutes

The July 17, 2018 minutes were approved as submitted. Tracy motioned Sowell seconded.

Chair Report – David Jones

David Jones thanked everyone for joining the meeting. Jones thanked Gary Hoff for leading the working group. Jones reminded the committee to be active with the work product.

Program Owner Report

N/A

Public comments

N/A

Project Committee Work

Issue 38550 – Form 15006, How to Schedule an Appointment, FA TAC

Holley reported no issues with the security guards in his state. There was an issue with only one employee working taxpayer issues and then there was a privacy issue as conversations were easily overheard. A waiting room outside of the working area or writing personal information down instead of speaking it out loud were suggestions to these issues.

Hoffman suggested making what would require an appointment more obvious to this form. Billups spoke about what to do if the issue is resolved before the referral moves to the IRS. Is updating the form still needed? Because the TAC employee is completing this form this is not needed, according to Hoff.

Jones will work with Holley on Issue 37360. Tracy spoke of the NTA's blog response to this issue; the suggestion was making a sign that reads, "Walk-ins are Accepted for These Transactions." There are issues due to General Service Administration (GSA) restrictions.

Martinez reported that this is still an issue in different parts of the country. Sue Simon, Field Assistance Director, is working on getting this information sent out to the security guards to prevent them from acting as gatekeepers. Facilities Management Service (FMS) is sending this information to them and their employers. The committee may change the issue to have the "Appointments Only" sign to be friendlier and include what services can be done via walk-in services.

Billups indicated they are sending a list of locations still experiencing this to Sue Simon to further work this issue. Jones reported this is number 10 on the NTA's 2017 Most Serious Problems (MSP). Hoffman and Jones will do research and report back to the committee by



next month's meeting. Jones reminded the committee that issues can be worked in between working group meetings.

Action: Issue tabled until next month.

Jones mentioned that he would periodically send reminders on issues like this to members throughout the month to help members stay on track with referrals.

Issue 37360 - Tax Refund Delays, Confidentiality, Taxpayer's Bill of Rights

Jones reported that something should be done to further protect Personally Identifiable Information (PII) that is given to IRS employees. Holley suggested writing this information now or having a separate waiting room are options being considered. Tracy volunteered to lead this issue. Hoff will work on this.

Sveral issues including space and finance were discussed, but ultimately this is a standard that the IRS hold Volunteer Income Tax (VITA) sites to so they should hold themselves to at least the same, according to Jones.

Issue 37299 and 38411(Have been Combined)

Martinez will check the Systemic Advocacy Management System (SAMS) to make sure similar issues don't already exist. This may be something that can be sent to the Notices and Correspondence committee. Tracy will work this issue. Jones will help. Jones will send a long document that Martinez send to the committee, make some notes then send it out to the committee.

Wrap-Up/Action Items

Billups will follow up with the following action items:

- David Jones Holley Hoffman will work on Issue 38550.
- Issue 37299 and 38411- Martinez will research this issue and check with Notices and Correspondence.
- 27399 84311 Martinez will work with Kathryn Tracy and David Jones
- TAC issues report to be reviewed and a sent to committee by Jones.
- Issue 37360 worked by Tracy and Hoff.

Billups reported that O'Sullivan and Olson will work the committee to select next year's chair and vice chair. Billups reiterated that we are looking for members to work on the Annual Report.

Closing

Billups closed the meeting.

**Next Meeting: Tuesday, September 18, 2018
4:00 p.m. ET, 3:00 p.m. CT, 2:00 p.m. MT, 1:00 p.m. PT**



**Taxpayer Assistance Center (TAC) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
October 16, 2018**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer (DFO)

Members Present

- | | | |
|------------------|-------------------------|------------------|
| • Tasheka Dorsey | Darrow, LA | Member |
| • Gary Hoff | Hot Springs Village, AR | Member |
| • Holly Hoffman | Amherst, WI | (National Chair) |
| • David Jones | Hickory Creek, TX | Chair |
| • James Sowell | Panama City, FL | Member |
| • Kathryn Tracy | Buckeye, AZ | Member |

Members Absent

- | | | |
|----------------------------|-------------------|------------|
| • Kimberly Clark-Robinson | Bear, DE | Member |
| • Joseph Holley (Resigned) | Barboursville, WV | Vice Chair |

Staff Present

- Terrie English, TAP Director
- Susan Jimerson, Designated Federal Officer
- Gilbert Martinez, Program Analyst
- Matthew O'Sullivan, Program Analyst
- Lisa Billups, Program Analyst
- Gary Lindsey, W&I
- Tamikio Bohler, W&I
- Annie Gold, TAP Administrative Assistant

Members of the Public

None

Roll Call

Quorum was met

Opening/Welcome – Susan Jimerson

Jimerson welcomed everyone to the call. She informed the committee her detail has ended, and she is now back with the TAP.

- The Meet the Candidates call has been rescheduled to November 19, 2018, at 2:00 p.m. ET. Members are encouraged to call in if available. This will be an important call that will give members the opportunity to meet the



candidates for the chair and vice chair position for TAP year 2019. A new invite with the rescheduled date will be sent out to everyone.

- The Joint Committee meetings is scheduled for October 25, 2018, beginning at 1:00 p.m. ET.
- The last Working Group meeting will be November 14, 2018 at 2:00 p.m. ET.
- The last full committee meeting will be November 20, 2018.

Members were encouraged to try and finalize the projects being worked during the Working Group meeting. Some members will be leaving TAP. They have reached their third-year tenure and will be retiring from the Panel. Those members who will be retiring are asked to share their experience and information with the upcoming committee members. Gilbert Martinez provided a review of the agenda.

Approval of Minutes

September 18, 2018 minutes were approved as submitted.

Chair Report – David Jones

Jones stated his report was covered in the DFO Report. The reports from the subcommittees will provide additional information.

Program Owner Report

N/A

Project Committee Work

Kathryn Tracy shared the following update.

- **Issue 38551**, Volunteer Income Tax Assistance/Tax Counseling for the Elderly (VITA/TCE) Product Review and TAC Review. Jones stated Jimerson will follow up with Tamikio Bohler on the committee's participation next year with the VITA and on the available budget.
Feedback was received from Sue Wennermark and Jones. Martinez will be adding the information to SAMS. Tracy thanked everyone for allowing the committee to be a part of the VITA/TCE.
- **Issue 37360**, Confidentiality at TAC Offices. The referral was sent out to the committee by Martinez. It is being reviewed by the TAP Staff, Systemic Advocacy, Technical Advisor and the TAS Attorney. The committee discussed the Issue. Recommendation was made to advance to the Joint Committee for consideration.
 - Decision: Full Committee Consensus move forward to the Joint Committee
- **Issue 38550**, Taxpayers Being Turned away in error from the TAC offices. Jones stated information related to Form 15006 should be included in the referral. Holly confirmed. Martinez provided guidance and discussion with the committee to move forward. The recommendation was made by the committee to move forward with this issue.
 - Decision: Full Committee Consensus move forward to Joint Committee for consideration.



- **Issue 36900**, Taxpayers on hold 40 to 50 minutes to schedule an IRS appointment. Jones stated an email was sent out to members on whether to move forward or place in the parking lot for future work. The committee's recommendation is to place this issue in the parking lot to work in 2019.

Screening Committee Report – Kathryn Tracy

Tracy stated the Screening Committee had eleven new Issues.

- **Issue 40006**, VITA issue having self-serving computers available at sites for Free File. The Screening Committee accepted this issue and placed in the parking lot for 2019 TAP committee's consideration.
- **Issue 40007**, VITA issue the Screening Committee will look at income level that disqualify people from participating in the Free File. This Issue was accepted and placed in the parking lot for 2019 TAP Committee's consideration.

The other nine Issues were closed. They did not fall within TAP scope to be worked. The submitters who supplied contact information were notified of the status and they should contact the Taxpayer Advocacy Service for further information.

Jones mentioned the resignation of Joseph Holley. A member is needed to act as TAC vice chair for the remainder of this TAP year. He asked if Tracy would accept the nomination to be acting vice chair for this timeframe. With no other members interested in the position, Tracy accepted to be the TAC vice chair for the duration of this TAP year.

Wrap-Up/Action Items

Martinez will follow up with the following action items:

- Send referral for Issue 37360, Confidentiality at TAC Offices up to the Joint Committee for consideration.
- Send referral for Issue 38550, Turning Taxpayers away in error at TAC Offices up to the Joint Committee for consideration.
- Issue 36900 is currently in the parking lot. Martinez will provide additional research to the committee to determine to move forward.

Closing

Jimerson closed the meeting.

**Next Meeting: Tuesday, November 20, 2018
4:00 p.m. ET, 3:00 p.m. CT, 2:00 p.m. MT, 1:00 p.m. PT**

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



**Taxpayer Assistance Center (TAC) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
November 20, 2018**

Designated Federal Officer

- Matthew O’Sullivan Acting, Designated Federal Officer (DFO)

Members Present

- Tasheka Dorsey Darrow, LA Member
- Gary Hoff Hot Springs Village, AR Member
- Holly Hoffman Amherst, WI (National Chair)
- David Jones Hickory Creek, TX Chair
- Kathryn Tracy Buckeye, AZ Member

Members Absent

- Kimberly Clark–Robinson Bear, DE Member
- James Sowell Panama City, FL Member
- Joseph Holley (Resigned) Barboursville, WV Vice Chair

Staff Present

- Terrie English, TAP Director
- Matthew O’Sullivan, Acting Designated Federal Officer
- Gilbert Martinez, Program Analyst
- Gary Lindsey, W&I
- Annie Gold, TAP Administrative Assistant

Members of the Public

Paul Merrion

Roll Call

Quorum was met

Opening/Welcome – Matthew O’Sullivan

Terrie English welcomed everyone to the call. O’Sullivan stated he is Acting Designated Federal Officer during Susan Jimerson’s absence. Members were thanked for their service and congratulated for all that they have accomplished. Appreciation was shared with the retiring members. Susan Jimerson sent an email to the returning members asking for their committee preferences for 2019.

National Office Report – Terrie English

English reminded the members on getting all reports completed and turned in. There will be a survey sent out to members to share their input on how the program is going and how it is working for each member. Members are encouraged to provide information on what can be



done differently to make the program better. There are things that could be done differently. The Recruitment Package is with the National Taxpayer Advocate, Nina Olson. Once she signs off on the package it goes to the Commissioner and on to the Treasury. Updates to the training material is being done. Returning members will be asked to be a part of the training. Holly Hoffman will be asked to assist in setting up some of the information. Members who are interested in being a Mentor to the new members who will be coming aboard should contact the analysts or managers. There was an email sent requesting returning members to provide their committee preferences. Appreciation was expressed to the retiring members. English thanked them for their hard work, dedication and service rendered. She shared her appreciation to the returning members as well.

Gilbert Martinez gave an overview of the agenda for today's call.

Approval of Minutes

October 16, 2018 minutes were approved as submitted.

Chair Report – David Jones

Jones stated Martinez did a great job covering the agenda. Appreciation was expressed to Holly Hoffman and Gary Hoff on their retiring from the Panel. The chair's report was covered in the DFO Report. Thank you to Kathryn Tracy for stepping up to be the vice chair for the remaining TAP year. Thank you to the TAP Staff for their contributions.

Public Comments

None

Program Owner Report

None

Project Committee Work

Martinez shared the following update.

- **Issue 38551**, Volunteer Income Tax Assistance/Tax Counseling for the Elderly (VITA/TCE) Product Review and TAC Review. Systemic Advocacy Management System (SAMS) has been updated. Credit was given for action items and feedback on the updating products and forms for VITA.

There were two Issues to go forward to the Joint Committee for IRS consideration.

- **Issue 37360**, Confidentiality at TAC Offices. There were two Recommendations included with the referral.
- **Issue 38550**, Taxpayers Being Turned away in error from the TAC offices. There were seven Recommendations included with the referral.

They had one active issue.



- **Issue 36900**, Taxpayers on hold 40 to 50 minutes to schedule an IRS Appointment. Questions were submitted to the SME on last month. They are waiting for a response. They clarified the issue on Government issued ID where the individual needed two forms of ID for authentication.

The workgroup reviewed the Issue Inventory and made decisions on the issues in the Parking Lot that would go forward in 2019 and which issues would be dropped.

Screening Committee Report – Kathryn Tracy

Tracy stated the Screening Committee have four new Issues. All four were individual issues and were not accepted. They closed Issues in the Parking Lot. There were two VITA questions were closed out due to both were individual issues. There were no new issues accepted by the Screening Committee.

Jones mentioned if IRS wants the committee to be involved in the reviews of the 4012s Link and Learn process. He asked for the status on if there would be available budget for participation in Atlanta. English responded it was inquired by Jimerson. It has been elevated to have a member attend. She is waiting for the response. Gary Lindsey will share the inquiry with Tamikio Bohler if the committee will be able to participate with VITA next year.

Outreach Report

Martinez informed the members to continue to submit their Outreach Reports through November and December. Members can send their information to Martinez via Email in December. There will be a newsletter for December and January with any Outreach Activities. Martinez will add the Activities on www.TAPSpace.org. If there are any questions, members should reach out to Martinez. One of the goals for TAP is to have the current listing of all Local Taxpayer Advocates, Stakeholder Liaison, Government Liaison, etc. ready for members at the Face to Face. Special appreciation expressed to Jones for chairing the committee. Thank you, Hoffman for all the hard work and dedication as chair. Thank you to every member of the TAC for all the work done.

Jones added the formulas on the Activity Report should be adjusted to calculate all entries.

Closing

Martinez closed the meeting.

**Next Meeting: Face to Face 2019
(Dates and Time to be determined)**

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