



2013 Meeting Minutes Taxpayer Communications Project Committee

- November 21, 2013
 - September 19, 2013
 - August 15, 2013
 - July 18, 2013
 - June 20, 2013
 - May 16, 2013
 - April 18, 2013
 - March 21, 2013
 - February 21, 2013
 - January 17, 2013
 - December 6-7, 2012
 - December 3-4, 2012
-

Taxpayer Communications Project Committee Taxpayer Advocacy Panel (TAP) Meeting Minutes November 21, 2013

Designated Federal Officer

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|-------------------|-------------|----------------------------|
| • Jimerson, Susan | Seattle, WA | Designated Federal Officer |
|-------------------|-------------|----------------------------|

Committee Members Present

- | | | |
|-----------------------|-------------------|--------|
| • Bekolo, Paulette | Morrisville, NC | Member |
| • Bilancia, Rich | Loveland, CO | Member |
| • Boyea, Ralph | Keaau, HI | Member |
| • Campbell, Stephanie | Farmington, MO | Member |
| • Edwards, Philessia | Austin, TX | Member |
| • Flanders, Seth | Emmaus, PA | Chair |
| • Kanack, Suze | Riverton, WY | Member |
| • Kelly, Eileen | Wilmette, IL | Member |
| • Marshalek, Mark | Powell, OH | Member |
| • Swartz, Mike | Austin, TX | Member |
| • Thomson, Mary Jo | Oklahoma City, OK | Member |
| • Watson, Theresa | Jacksonville, AR | Member |
| • Webster, Walter | Las Cruces, NM | Member |
| • Welles, Dawn | Milwaukee, WI | Member |

Committee Members Absent

- | | | |
|----------------|-----------------|--------|
| • Davine, Jeff | Los Angeles, CA | Member |
|----------------|-----------------|--------|



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|---|------------------------|---------------------|------------|
| • | George, Philip | St. George, UT | Member |
| • | Lees, Rodger | Evans City, PA | Vice-Chair |
| • | Petersen-Grosse, Chris | Elkhart, IN | Member |
| • | Sorich, Sam | El Dorado Hills, CA | Member |
| • | Wechter, Thomas | Glencoe, IL | Member |

TAP Staff

- | | | | |
|---|-----------------|------------------|-----------------|
| • | Andrews, Sheila | Indianapolis, IN | TAP Director |
| • | Robb, Patti | Milwaukee, WI | Program Analyst |
| • | Smiley, Ellen | Milwaukee, WI | Program Analyst |
| • | Gold, Annie | Houston, TX | Note Taker |

Program Owner/SME

- | | | | |
|---|------------------------|-----------|--------------------|
| • | Sanders-Walsh, Carolyn | Tampa, FL | Senior Tax Analyst |
|---|------------------------|-----------|--------------------|

TAS/Systemic Advocacy/SME

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|---|----------------|-------------|---------------------------|
| • | Stevens, Vicki | Seattle, WA | Public Affairs Specialist |
|---|----------------|-------------|---------------------------|

Portfolio Advisor/SME

- | | | | |
|---|----------------|--|--|
| • | Johnson, Deana | Business ID Theft / Employer Identification Number | |
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Opening/Welcome

Susan Jimerson opened the meeting and welcomed everyone to the call.

Roll Call

Quorum was met.

Review and Approve September Meeting Minutes

The September minutes were approved by consensus with one minor change.

National Office Report

Sheila Andrews said the new member package is on the Commissioner's desk at this point and hopefully, he will approve and send it forward to Treasury for their approval. The Regional face-to-face meetings are postponed due to the Government shutdown. Right now the tentative face-to-face meeting date is the week of February 24, 2014. There is continuing discussion going on though. We hope to start the training for new members virtually on December 9, 2013. We published Federal Register Notices for all the project committee meetings in December. A couple of the committees indicated they had referrals that still needed to be finalized.

Andrews thanked all the third-year members; Paulette Bekolo, Rich Bilancia, Jeff Davine, Seth Flanders, Eileen Kelly; Rodger Lees, Mark Marshalek, Chris Petersen-Grosse, and Thomas Wechter. All your passion and commitment to this TAP program is commendable and very much appreciated.

DFO/Office Report

Susan Jimerson echoed Andrew's comments for retiring members. Returning members were asked for their preference of project committees. The next Taxpayer Communications Committee meeting is scheduled for Thursday, December 19, 2013, for those of you who selected this committee. You will elect the chair, the vice-chair, and take care of other administrative needs before you hit the ground running and start tackling new issues.

Seth Flanders asked if the IRS approved the proposed Taxpayer Communications project focus? He was told there has been no final response from the Program Owners yet; they will respond in December.

Chair Report

Flanders said the Joint Committee (JC) met in October but the meeting was mostly administrative since project committees didn't meet in October due to the government shutdown. The JC reviewed and approved the updated TAP Member Handbook. There are some significant changes, so please make sure you review it.

The JC discussed the role of the TAP applicants chosen to be an alternate as opposed to be a new member. The desire is to keep them engaged.

There will be an extended JC meeting next week as there is still a lot to be accomplished. He encouraged the subcommittees to get their referrals finalized as soon as possible.

Subcommittee Report Outs

Website Subcommittee

- Issue 20659, Add Retirement Account Tax Facts
Stephanie Campbell said the subcommittee completed their referral. We are recommending the IRS add a link on their homepage to a landing page with retirement information. Flanders said this is a great build on the IRS website. Ralph Boyea added as a retiree who has not had to tap into his retirement funds yet, he would like to see this information available. Dawn Welles said she would like to see credits included in this referral. She also said the referral needs to refer to additional tax as a penalty instead of additional tax. Campbell said we warn of the penalty or additional tax on early withdrawals in the third bullet. We hope there will be links for both current retirees and those who are going to retire soon. We will leave the design to the IRS but we can give them information and suggestions. Welles added Earned Income Tax Credit (EITC) should also be addressed and how it could affect your retirement. Campbell said it the subcommittee will discuss it. Mike Swartz said this landing page is a sorely needed resource because what the IRS has now is inadequate. It is not always complete or timely so this is a great recommendation. Maybe a second subcommittee could assist the IRS in designing the page so it covers what needs to be covered. Ellen Smiley said the subcommittee wanted to make a general suggestion for the landing page and let the IRS handle the rest. Swartz asked if this would address self-employed taxpayers as well. Eileen Kelly responded it should cover everyone. Smiley said the referral still has to go to the Attorney Advisors so it won't be reviewed by the JC next

week. The subcommittee can make their minor changes and send it forward if approved by the full Committee. The design, if addressed, will be left to a later date.

Consensus to move forward with minor additions and changes

- **Issue 26338, Online Employer Identification Number (EIN) Assistant**

Boyea said this issue was identified by Jeff Davine and he is a third year member. We are experiencing problems in terms of getting information from the IRS. We elevated some questions and received answers, but that just raised more questions. We were told we would get another response within three to four weeks which is too late for Davine as his term ends on November 30. We want to keep this issue active and will continue to work on the referral. It will be carried over into new TAP year.

- **Issue 26615, Allow Comments on Customer Service**

Suze Kanack said the subcommittee is experiencing similar problems and is still waiting for a response from the IRS to questions. We do not want to drop this and also want to keep this project active. We plan to narrow the focus for the new TAP year.

- **Issue 27496, Disclosure Procedures**

Swartz said he has little to report as well. We elevated our questions to the IRS about three months ago and have yet to get a response. He is the only continuing member on this subcommittee but would also like to continue working the issue. Andrews has been working this issue behind the scenes and thinks it should be pursued. We are hoping to identify a subject matter expert soon. Flanders recommended to keep the issue alive and put it on next year's agenda. It's actually time to start planning for the February TCC meeting.

Case Resolution Room Memorandum

Swartz said he attended the Grapevine, TX, (Dallas) IRS Tax Forum this past summer. The IRS holds five to six Tax Forums each year. In the past, attendees could bring their most difficult cases to the Forum to meet with the IRS in the resolution room and in about 98 percent of the instances, the cases were resolved. Many of the attendees came specifically for that very reason. The IRS did not have the resolution room this year for what we believe were budgetary reasons. We heard a great many complaints with regards to this issue. We put together a team to write a memo to strongly recommend the IRS reinstate the problem resolution room for the 2014 IRS Tax Forums. The memo went to Public Affairs Officer Vicki Stevens as she is working with a team planning the forums.

Stevens said the Taxpayer Advocate Service (TAS) is amenable to reinstating the resolution room. The decision to cancel the resolution room was made at the IRS Commissioner level. The memo will go to the National Taxpayer Advocate Nina Olson to see if she wants to take it forward. We will know more next week.

Flanders thanked everyone who participated in writing and elevating this memo.

New Issues Screening Report

- Issue 27088, Return Process, Refund Returns Get Precedence
A taxpayer said he e-filed his return on February 8 through a vendor and needed it processed and validated so he could get a mortgage loan approved. Per the IRM, balance due e-file returns do not post until cycle 20 or one full cycle after full payment is made. The taxpayer can choose the date they want the funds electronically withdrawn from their bank account up to the due date of the return. There may be merit to this issue however it does not seem to be wide-spread enough to warrant working. **Consensus to DROP**
- Issue 27577, Unacceptable Refund Delays
The complaint is that her bank indicated the IRS did not deposit her refund although the IRS said it tried. Taxpayer may have given an incorrect bank account number.
Consensus to DROP
- Issue 27820, Payments – Estimated tax Schedule
Submitter wanted the second and third quarter payment due dates changed.
Consensus to DROP – Legislative
- Issue 28409, Withholding – Older Records Destroyed
This issue was actually a state matter.
Consensus to DROP – Not within TAP scope
- Issue 28385, Where is My Amended Return – Suggestion
The IRS should notify via email or on the web when an amended return is delayed.
Consensus to monitor to see if additional similar issues are received. PARKING LOT
- Issue 28508, IRS Slow to Respond
Submitter complained the IRS is slow to respond to inquiries. **Consensus to DROP – not enough specific information**
- Issue 28619, Improve Transcript Request Page
The transcript request page should be updated because it is not obvious that if there has been a change in the mailing address, the transcript will be sent to the old address. The IRS should have a warning saying the transcript will be mailed to the last address on file.
Consensus to make ACTIVE for the 2014 Website subcommittee to work.

Internal Communications Report

Mark Marshalek said the TAP October newsletter was just finalized based on the September write-ups. The Internal Communications Committee is meeting on November 26, 2013 to begin discussing the 2013 annual report. We hope to have that report out much earlier this coming year.

Year-End / Transition to Next Year

Flanders said he drafted this committee's report for next year's annual report. Please review and provide information and/or comments. He added he wants this to shine as a great example of what a committee can do.

We are beginning to transition to next year. The 2013 draft focus for this Project Committee was submitted to the IRS and we are waiting for approval. The new chair and vice-chair will help guide the transition. The third-year members rotate off on November 30 and the new



TAP year begins on December 1, 2013. Flanders wished all success and thanked the members who are rotating off.

He thanked everyone for their hard work this year.

Outreach

November will be the last outreach/hourly report due for this year. Please complete the report and send it to the staff.

Miscellaneous

Bilancia thanked Flanders for all his hard work. He encouraged everyone to take Flanders comments seriously and review the Committee's year end report. It's your time to shine so get your comments in.

The meeting was adjourned.



**Taxpayer Communications Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
September 19, 2013**

Designated Federal Officer

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|---|-----------------|-------------|----------------------------|
| • | Jimerson, Susan | Seattle, WA | Designated Federal Officer |
|---|-----------------|-------------|----------------------------|

Committee Members Present

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|---|---------------------|---------------------|------------|
| • | Bilancia, Rich | Loveland, CO | Member |
| • | Boyea, Ralph | Keaau, HI | Member |
| • | Campbell, Stephanie | Farmington, MO | Member |
| • | Davine, Jeff | Los Angeles, CA | Member |
| • | Edwards, Philessia | Austin, TX | Member |
| • | Flanders, Seth | Emmaus, PA | Chair |
| • | George, Philip | St. George, UT | Member |
| • | Kanack, Suze | Riverton, WY | Member |
| • | Lees, Rodger | Evans City, PA | Vice-Chair |
| • | Marshalek, Mark | Powell, OH | Member |
| • | Sorich, Sam | El Dorado Hills, CA | Member |
| • | Thomson, Mary Jo | Oklahoma City, OK | Member |
| • | Watson, Theresa | Jacksonville, AR | Member |
| • | Webster, Walter | Las Cruces, NM | Member |

Committee Members Absent

- | | | | |
|---|------------------------|-----------------|--------|
| • | Bekolo, Paulette | Morrisville, NC | Member |
| • | Kelly, Eileen | Wilmette, IL | Member |
| • | Petersen-Grosse, Chris | Elkhart, IN | Member |
| • | Swartz, Mike | Austin, TX | Member |
| • | Wechter, Thomas | Glencoe, IL | Member |
| • | Welles, Dawn | Milwaukee, WI | Member |

TAP Staff

- | | | | |
|---|-----------------|------------------|-----------------|
| • | Andrews, Sheila | Indianapolis, IN | TAP Director |
| • | Robb, Patti | Milwaukee, WI | Program Analyst |
| • | Smiley, Ellen | Milwaukee, WI | Program Analyst |
| • | Gold, Annie | Houston, TX | Note Taker |

Program Owner/SME

- | | | | |
|---|------------------------|----------------|--------------------|
| • | Marsh, Nadine | Washington, DC | Tax Analyst |
| • | Sanders-Walsh, Carolyn | Tampa, FL | Senior Tax Analyst |

TAS/Systemic Advocacy/SME

- | | | | |
|---|----------------|-------------|---------------------------|
| • | Stevens, Vicki | Seattle, WA | Public Affairs Specialist |
|---|----------------|-------------|---------------------------|

Portfolio Advisor/SME

- Johnson, Deana Business ID Theft / Employer Identification Number

Guests

- Wight, Paul Program Analyst, Wage & Investment
- Awalt, Debra Program Analyst, Wage & Investment
- Jones, Cindy Supervisor/Manager, Wage & Investment
- Momon Townsend, Deb'orah Program Manager, Wage & Investment

Opening/Welcome

Susan Jimerson opened the meeting and welcomed everyone to the call.

Roll Call

Quorum was met.

Review and Approve August Meeting Minutes

The August minutes were approved by consensus as submitted.

DFO/Office Report

Jimerson announced our current Program Owner Nadine Marsh will be retiring at the end of September and Carolyn Sanders-Walsh will replace her. Sanders-Walsh worked with this committee on the Small Business Tax Workshop project and the Decreasing Non-Filers Project Committee last year. Sanders-Walsh said she is looking forward to working with everyone again. Jimerson expressed special thanks to Marsh for all of her assistance.

During their August face-to-face meeting, the Joint Committee approved elevating three of the four Taxpayer Communications Committee issues. They will be going to the IRS shortly.

Issue 26418, Identity Theft of Business Taxpayers

Issue 26381, HTML Format

Issue 26417, Increase Use of the Online Payment Agreement

The remaining potential furloughs are cancelled through the end of September. However, we are currently looking at a potential Government shutdown beginning on October 1. Sheila Andrews said we have no control over the possible shutdown but I'm sure you will know what is going on by reading the newspaper. If a shutdown does occur, TAP will not be working as we are not considered essential personnel. A shutdown has happened in the past but generally lasted only a couple days. If a TAP meeting is scheduled, Andrews will send an email message to let everyone know the meeting is cancelled. We are prohibited from working if there is a shutdown and it's looking a little dicey right now.

We are preparing for the next recruitment phase for TAP. Please keep in mind, all tax waivers are due by the end of September. If you haven't returned yours yet, please send it in as soon as possible. Remember, if you are married, you must also have your spouse sign



the waiver. If you have questions or concerns send an email or call Linda Rivera who is coordinating this project.

Online Transcript Information

Paul Wight is a Senior Manager in the accounts management area. He talked about the online product and gave some background. A taxpayer can order transcript online or on the phone. It will be mailed to the address on record and delivered in about ten days. The transcript can actually be mailed or faxed, or the taxpayer can go to a Taxpayer Assistance Center and have one printed as well. This is a free service. A taxpayer will still be charged if they want an actual copy of a tax return though.

There is a new product called Get Transcripts. We plan to launch it in January of 2014. The initial release will be in English only. What is it? A taxpayer can go on a computer and use an e-authentication process and then can request one of five kinds of transcripts.

1. Tax return transcript
2. Tax account
3. Record of account – line by line
4. Wage and investment documents – can get W-2 and 1099
5. Letter of Non-filing - if a taxpayer didn't file a return for a certain year.

They can view and print one of those transcripts and they will look like they do now. The taxpayer can do it from home or wherever the computer is and will save time and effort. This is for individual taxpayers only. It will have an exception process for victims of identity theft. There will be a comprehensive communication plan. And this is just a taste of the information that will be coming out sometime down the road and should be a great benefit for taxpayers. It will be on IRS.gov website. Taxpayers will still be able to use the order a transcript via web or phone automation. It will all be branded. And the mail will be an option and can still use the Form 4506T, *Request for Transcript for Tax Return*.

This program cannot be used by practitioners to get transcripts for clients. Practitioners already have access to e-services. This cannot be used for clients as there will be an authentication process and questions to be answered by the taxpayer with info only known to them; name, mailing address, SSN, date of birth, etc. We will be partnering with one of the national credit services and they will control the other questions and we don't know what they will ask at this time. The Social Security Administration (SSA) uses this system right now. If you cannot pass authentication, you will have access to the other automated transcript services.

The business access is a concept but that aspect has not been looked at yet as there are so many different types of companies to consider. So business is strictly a concept at this time.

We are very excited about this program.

Chair Report

Seth Flanders said the 2014 Taxpayer Communications Project Focus has been approved and sent through Systemic Advocacy to the IRS for approval. We also have the mentoring program draft for 2014 in place. Linda Rivera is working on the final product. Flanders

encouraged each member of the Committee to consider nominating someone or volunteering to be the next TAP Chair or Vice-Chair for 2014. The election is set to take place on time and everyone is encouraged to take advantage of the opportunity. He added each person adds value and is capable of serving in these positions.

Subcommittee Report Outs

- **Website Subcommittee**

The Subcommittee met last week and discussed Issue 20659, Add Retirement Tax Facts. We are waiting for information and will be meeting again next week. Issue 23725, IRS Website Chat Feature, was revised and sent back to the Joint Committee for elevation.

- **Issue 26338, Online Employer Identification Number (EIN) Assistant**

Jeff Davine shared not a lot of progress has been made. They submitted a request to IRS for information and are still waiting to hear from them.

- **Issue 26615, Allow Comments on Customer Service**

Suze Kanack said they are meeting next week. They have completed a draft referral and are working on the wording. We are moving forward at a good pace.

- **Issue 27496, Disclosure Procedures**

Patti Robb stated the Subcommittee met and identified some questions. A request for information was elevated and they are now waiting for a response.

San Diego Tax Forum Report

Sam Sorich said he went to the Tax Forum this week with Aileen Fisher. He added it was a very positive experience and there were about 2,000 people in attendance. He said he felt they were talking to the right people – practitioners. They understand taxes and when we sought their input or talked to them about issues, they knew what we were talking about. We distributed about 490 TAP speak-up brochures. We handed out about 500 of the self-mailer tri-folds, got back ten written forms, and hopefully more will be filled out and mailed back. We also wrote down several other issues. The tax forums are very valuable and TAP needs to attend them.

There seems to be continuing confusion between TAP and the Taxpayer Advocate Service (TAS). Our names are too similar and we should consider changing our name to distinguish us from them.

One issue we heard a lot (20 to 30 times) was the absence of the TAS resolution room. Many practitioners were prepared to talk to TAS but they were not there. Some brought all their files and said that was the main reason for attending. The disappointment came across loud and clear. Although Sorich said he talked to an IRS employee and was told the

practitioners need to get their perspective straight – the Tax Forums are for educational purposes.

He encouraged others to attend the tax forums if opportunity presents itself.

New Issues Screening Report

- Issue 28429, Tax Forum – Bring Back Case Work Resolution

Practitioners were disappointed that TAS was not at the Tax Forum. This issue is currently driven by the budget, however, is a viable issue. Andrews said we will already be giving feedback regarding this issue to the IRS as a result of comments from all the Tax Forums. Vicki Stevens added the National Taxpayer Advocate is pursuing getting the tax resolution added back to the Tax Forums. It is very much front and center right now. The planning for next year's forums is already underway. If TAP is going to work it, it needs to be done right away. Flanders asked if our voice would make a difference. Andrews said we provided the feedback already so Stevens can go forward and say she also heard it from TAP. We want to make this change immediately so it kind of validates the practitioners' comments. Stevens gets the feedback from TAP and the public liaison. The feedback from you helps her when responding to the National Taxpayer Advocate. She will assist if you want to work this issue but it will have to be done right away if it's going to be done by TAP. Sorich and Philessia Edwards will write something up, send it to Flanders for finalizing, then it will go to Robb, and ultimately to Andrews. Stevens said to check with members who attended the other forums and get their feedback.

WORK IMMEDIATELY

- Issue 26349, EFTPS Notification Enrollment Looks Like Junk Mail

This is a U.S. Treasury issue as they are responsible for carrying out specific operations assigned to the Department. The envelope is identifiable and the IRS does not want to indicate tax information is inside. Smiley said we could elevate a recommendation through the IRS to Treasury if anyone feels strongly about it.

Consensus to Drop

- Issue 16767, Where is My Refund Site Improvement

This is an injured spouse issue. The Instructions for Form 8379, *Injured Spouse Allocation*, says it takes up to fourteen weeks to process a paper return. It would be quite difficult to keep the website updated as to where an individual form is in the system.

Consensus to Drop

- Issue 28319, Website Clarification

A taxpayer would like the IRS to define income on the front page of their website and identify the law that requires Citizens to pay taxes earned.

Consensus to Drop

- Issue 28411, Identity Theft – Proactive Approach

The IRS should initiate a tax freeze when taxpayers change their address. The freeze should not be lifted until the taxpayer confirms the change.

Consensus to associate with the ID Theft Taskforce Issue 22177



Internal Communications Report

Mark Marshalek said the Internal Communications Committee has already begun working on the 2013 Annual Report. He will be sending the project committee report template to the chairs later today.

Outreach

Flanders encouraged members to continue turning in their outreach hourly reports.

Miscellaneous

Robb received a request to schedule these meeting calls one hour later than the current meeting time. Since there are only two calls remaining for this year consensus was to keep the current time.

Jimerson adjourned the meeting.

**Next meeting: Thursday, November 21, 2013
2 p.m. ET; 1 p.m. CT; Noon MT; 11 a.m. PT; 9 a.m. HT**



**Taxpayer Communications Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
August 15, 2013**

Designated Federal Officer

- | | | |
|-------------------|-------------|----------------------------|
| • Jimerson, Susan | Seattle, WA | Designated Federal Officer |
|-------------------|-------------|----------------------------|

Committee Members Present

- | | | |
|--------------------------|---------------------|--------|
| • Bilancia, Rich | Loveland, CO | Member |
| • Boyea, Ralph | Keaau, HI | Member |
| • Campbell, Stephanie | Farmington, MO | Member |
| • Davine, Jeff | Los Angeles, CA | Member |
| • Edwards, Philessia | Austin, TX | Member |
| • Flanders, Seth | Emmaus, PA | Chair |
| • George, Philip | St. George, UT | Member |
| • Kanack, Suze | Riverton, WY | Member |
| • Kelly, Eileen | Wilmette, IL | Member |
| • Marshalek, Mark | Powell, OH | Member |
| • Petersen-Grosse, Chris | Elkhart, IN | Member |
| • Sorich, Sam | El Dorado Hills, CA | Member |
| • Swartz, Mike | Austin, TX | Member |
| • Watson, Theresa | Jacksonville, AR | Member |
| • Webster, Walter | Las Cruces, NM | Member |
| • Welles, Dawn | Milwaukee, WI | Member |

Committee Members Absent

- | | | |
|--------------------|-------------------|------------|
| • Bekolo, Paulette | Morrisville, NC | Member |
| • Lees, Rodger | Riverton, WY | Vice-Chair |
| • Thomson, Mary Jo | Oklahoma City, OK | Member |
| • Wechter, Thomas | Glencoe, IL | Member |

TAP Staff

- | | | |
|-------------------|---------------|-----------------|
| • Smiley, Ellen | Milwaukee, WI | Program Analyst |
| • Robb, Patti | Milwaukee, WI | Program Analyst |
| • Maine, Kymberly | Seattle, WA | Note Taker |

Program Owner

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|-----------------|----------------|-------------|
| • Marsh, Nadine | Washington, DC | Tax Analyst |
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Systemic Advocacy

- | | |
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| • Stevens, Vicki | Public Affairs Specialist, Communication & Liaison |
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Opening/Welcome

Susan Jimerson opened the meeting and welcomed everyone to the call.

Roll Call

Quorum was met.

Review and Approve July Meeting Minutes

The minutes were approved by consensus as submitted.

Dallas Tax Forum Report

Mike Swartz and Philessia Edwards provided a brief report about their experience at the Dallas Tax Forum. They had several hundred people stop by with lots of questions and comments regarding the Case Resolution Form. They also handed out Local Taxpayer Advocate (LTA) contact information. The LTA did not have a presence at the Forum and that was a concern for numerous people. There were also some comments regarding the lack of IRS visibility in recent years. They said there was a lot of confusion between Taxpayer Advocate Service and TAP and exactly what the difference was.

Edwards said people wanted trinkets TAP is now unable to hand out.

Swartz said he had several people who seemed very interested in volunteering for the TAP. He also felt the event would have been better had there been IRS presence at the forum.

DFO/Office Report

Jimerson said the Joint Committee reviewed the Regional Meeting training materials during their face-to-face meeting. They decided some courses would be presented prior to the face-to-face meetings as pre-reads to allow more time with project committee work.

She also mentioned the furlough day that had been scheduled for August 30, 2013, had been cancelled, but there could be limited staff in the TAP offices due to the liberal leave policy.

She announced Kymberly Maine had accepted a new job and would be leaving TAP. Her last day with the IRS will be Friday, August 23, 2013.

Chair Report

Flanders said the Joint Committee face-to-face meeting in Milwaukee went very well. He said they had a chance to speak with Executive Director Systemic Advocacy Rena Girinakis and got a good feel for her future vision for TAP. She said TAP is essential and she wanted to make sure that TAP had work that was meaningful and was able to make a difference.

Flanders reminded everyone to review the bylaws sent via email and cast your vote for approval or disapproval. They need membership approval before being considered final.



He also mentioned that an email would be coming out soliciting self-nomination for TAP Chair or TAP Vice-chair for 2014. If you like outreach, then TAP Vice-chair is for you. The voting would be sometime in September. If you're not interested in TAP Chair or Vice-chair, consider becoming a project committee chair.

Flanders drafted the Taxpayer Communications proposed focus for next two years. Please review the document and provide your feedback by the end of the day. He will try to incorporate your comments in the draft. Communications is very broad and the Committee can work just about any issue.

The Joint Committee is focusing on increasing the breadth of mentoring. It's good to increase your knowledge as well as share what you already know. It's a very important part of TAP.

Subcommittee Report Outs

The chairs of the subcommittees provided a brief update:

Website Subcommittee

Stephanie Campbell reported the subcommittee is currently discussing Issue 20659, *Add Retirement Tax Facts to Website*. She mentioned the group changed the name of the issue and a quite a bit of work has been done. The subcommittee elevated two issues to the Joint Committee for approval, Issue 23725, *IRS Website Chat Feature*, and Issue 26381, *HTML Format*. Both were returned for some minor re-work.

Online Employer Identification Number (EIN) Assistant

Jeff Davine provided the background on Issue 26338, *Online EIN Assistant*. They are looking to find out if the IRS can identify another time period when they could shut down the system that would not cause a hardship for both practitioners and taxpayers trying to get an EIN. He said the subcommittee developed several questions for more information and are waiting for responses.

Allow Comments on Customer Service

Suze Kanack said the subcommittee is working on a draft recommendation for Issue 26615. They had their first meeting two days ago and asked for information.

Disclosure Procedures

Flanders reported the subcommittee just formed and their first meeting is next week.

New Issues Screening Report

Sam Sorich presented their recommendations to the new issues:

Issue #26767, *Where is my Refund Site Improvement*

Sorich said the subcommittee recommends holding this issue for more information.

Consensus to hold for more information

Issue #27979, *Ways to Improve IRS E-Services*



The IRS should add more tools for practitioners to use instead of taking tools like Disclosure Authorizations (DA) and Electronic Account Resolution (EAR) away.

Consensus to associate with Systemic Advocacy (SA) Issue #27749, Elimination of E-Services and EAR Applications

Issue #28025, *Where's my Refund Site Not Providing Refund Inform*

The website is not useful at times and the IRS should make adjustments to provide more information regarding processing times. Sam said the subcommittee recommended holding a discussion with the full committee to get more input.

Consensus to associate the issue with Issue 26615, Allow Comments on Customer Service. If they don't want to work it, put in the parking lot

Kanack will present the issue to the subcommittee and report on the result at the September meeting.

Issue 28031, *1040X Return Processing – Long Wait*

The IRS should change the process for taxpayers who wait to receive their Individual Taxpayer Identification Number (ITIN) and then have to wait even longer to receive their refund because they are required to mail in their return.

Consensus to drop

Issues Reassigned to Taxpayer Communications from General Parking Lot:

Issue 22274, *Make ES Payment Information Available on Web*

The IRS should add ability for taxpayers to be able to look up dates and amounts of their estimated tax payments on IRS.gov.

Consensus to continue to monitor the IRS progress and continue trying to get a subject matter expert for the September meeting

Internal Communications Report

Mark Marshalek said the Annual Report is going to Communication and Liaison (C&L) and then to publishing. We hope to have it ready for distribution in mid-September. We will start working on next year's annual report now. The Committee identified redundant sections that can be deleted.

They will be making changes to the TAP Newsletters but will still keep it to one page. Marshalek reminded everyone to be sure to vote on bylaws.

Electronic Tax Calendar

Kanack attended a review of the Electronic Tax Calendar and said it was very interesting. There were numerous options that could be turned on to better help the practitioners who used the product. It cannot be used on a smart phone yet which brought numerous complaints from practitioners.

Dawn Welles added hard copies would no longer be available to practitioners. She said she hadn't used the calendar before but she would this year.



Outreach

Flanders reminded everyone to submit their outreach report. Any outreach can be submitted at any time throughout the year and can be submitted until December when the new TAP year begins.

Taxpayer Communication Two-Year Plan

Flanders said he was looking for feedback on his proposed 2014 Two-Year Taxpayer Communications Project focus. It will be the focus of the Committee in the future.

Miscellaneous

Flanders expressed his thanks to the members for all their hard work so far this year.

Jimerson adjourned the meeting.

Next meeting: Thursday, September 19, 2013 at 2 p.m. ET; 1 p.m. CT; Noon MT; 11 a.m. PT; 8 a.m. HT



**Taxpayer Communications Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
July 18, 2013**

Designated Federal Officer

- Shepard, Tim Seattle, WA Designated Federal Officer

Committee Members Present

- Boyea, Ralph Keaau, HI Member
- Campbell, Stephanie Farmington, MO Member
- Davine, Jeff Los Angeles, CA Member
- Flanders, Seth Emmaus, PA Chair
- George, Philip St. George, UT Member
- Kanack, Suze Riverton, WY Member
- Kelly, Eileen Wilmette, IL Member
- Sorch, Sam El Dorado Hills, CA Member
- Swartz, Mike Austin, TX Member
- Watson, Theresa Jacksonville, AR Member
- Thomson, Mary Jo Oklahoma City, OK Member
- Welles, Dawn Milwaukee, WI Member

Committee Members Absent

- Bekolo, Paulette Morrisville, NC Member
- Bilancia, Rich Loveland, CO Member
- Edwards, Phileasia Austin, TX Member
- Lees, Rodger Riverton, WY Vice-Chair
- Marshalek, Mark Powell, OH Member
- Petersen-Grosse, Chris Elkhart, IN Member
- Webster, Walter Las Cruces, NM Member
- Wechter, Thomas Glencoe, IL Member

TAP Staff

- Andrews, Sheila Indianapolis, IN TAP Director
- Robb, Patti Milwaukee, WI Program Analyst
- Smiley, Ellen Milwaukee, WI Program Analyst
- Maine, Kymberly Seattle, WA Note Taker

Program Owner

- Marsh, Nadine Washington, DC Tax Analyst

TAS/Systemic Advocacy/SME

- Johnson, Deana Business Identity Theft
- Stevens, Vicki Public Affairs Specialist



- Angeloff, Tamara Online Payment Agreement

Opening/Welcome

Tim Shepard opened the meeting and welcomed everyone to the call.

Roll Call

Quorum met.

Public Comments

None

Review and Approve June Meeting Minutes

The minutes were approved as submitted.

DFO/Office Report

Shepard said the furlough day scheduled for Monday, July 22, 2013, has been cancelled and all IRS offices will be open. He added most of the TAP staff will be in the office as well.

The Outreach Subcommittee has revised and simplified the outreach reporting form. Everyone is encouraged to use it this month to report their outreach. Shepard gave a brief overview of the changes made. Members do not need to populate their prior information; the staff will do it.

Seth Flanders reminded everyone it is important to keep track of hours spent on TAP work. The staff uses this information to show how much work TAP members do for the organization.

Chair Report

Flanders said the Regional Planning Subcommittee asked to have an all member annual face-to-face meeting, but it was rejected due to budget constraints. They are now focusing on a regional meeting similar to last year. The meetings will be in three different locations but at the same time. The returning members will share their experiences and help bring the new members up to speed.

The Quality Review Subcommittee at the Joint Committee level has been discontinued. The referrals were already being reviewed by several members in each committee and they were doing a very good job.

Flanders said the Joint Committee's face-to-face meeting is approved and will be held August 6-7, 2013, in Milwaukee. He added their agenda for this month is completely full and they are deferring incoming referrals to the next meeting.

Subcommittee Report Outs

Website Subcommittee

Stephanie Campbell said the Subcommittee has sent two referrals for Joint Committee review during the face-to-face meeting; Issue 23725, IRS Website Chat Feature; and, Issue 26381, HTML Format. The Subcommittee will continue to work on Issue 20659, Add Retirement Tax Facts.

Online EIN Assistant Subcommittee

Jeff Davine said the Subcommittee is in the beginning stages of working on Issue #26338, Online Employer Identification Number (EIN) Assistant. They scheduled calls on the first Thursday of each month. They received some preliminary information from Ellen Smiley and will begin discussions on their first call.

Patti Robb asked subcommittee leads if they want to present their respective referrals to the Joint Committee. A telephone will be available for conference calls.

ACTION: Robb will send out an email asking the lead if they want to make the presentation or if they prefer to have Flanders present the referral.

Sheila Andrews added the Joint Committee will have two meetings in August. The first would be the face-to-face meeting August 6-7, and the second meeting would be the regularly scheduled meeting on the fourth Wednesday of the month, August 28, 2013. This will allow them to review more referrals in August.

Internal Communications Report

Suze Kanack said the 2012 Annual Report is in the final editing stage and the cover needs to be selected before it goes to the publisher.

She said the Committee is also working on the pocket guide to refresh the information for member use. The hope is it will be ready for the new members in December, if not sooner. If you have suggestions or comments, they would like to hear them.

The June Newsletter will be presented to the Joint Committee for approval and should be coming out soon.

Quality Review Subcommittee

Mary Jo Thomson reviewed a few referrals prior to them going to the Joint Committee and some of her comments were incorporated.

New Issues Screening Report

Sam Sorich went over the new issues and the subcommittee recommendations:

New Issues

Issue #26139, Preventing Fraudulent Returns from Stolen SSN's

The submitter wanted the IRS to require taxpayers provide their prior year's Adjusted Gross Income (AGI) when they file their current year's return. The recommendation is to associate this issue to the ID Theft Task Force issue 22177.

Consensus: Associate to the ID Theft Task Force Issue 22177.

Issue #26615, Website – Allow Comments on Customer Service

The submitter wanted the IRS website to allow taxpayers and tax professionals the ability to leave comments regarding customer service. The IRS previously rejected a similar issue elevated by the Area 5 Committee in 2010. They indicated there are several mechanisms already available to taxpayers to comment on service. They also believed considerable resources would be needed to review the comments and ensure the information was shared with the appropriate IRS business unit.

Consensus: Make issue active and request interest in working.

Issue #27579, Website – Put Late Filing Calculator on IRS.gov

The submitter wanted the IRS to add a calculator to IRS.gov to assist taxpayers in estimating late filing fees.

Consensus: Place issue in the parking lot.

Issue #27789, Disclosure of Charitable Organization Tax Return Information

The submitter, who is a TAP member, became aware of a disclosure issue with the filing practices of Charitable Organizations, specifically the disclosure of the donor list. He asked that TAP take a look at the IRS disclosure processes and procedures.

Consensus: Make issue active and request interest in working.

New Committee Assignments

Flanders noted this will be two new subcommittees and he hoped everyone would volunteer to work on one of the two. If neither of these are of interest, there should be more new issues next month, but after next month there will not be any new subcommittees formed as it will be too close to the end of the year. We don't want to start on something we are unable to complete prior to the end of the year.

Outreach

Robb reminded everyone to turn in their outreach reports.

Miscellaneous

Ralph Boyea asked about the current status of the E-Fax issue. Ellen Smiley responded we are still trying to get someone from Online Services to speak about the PowerPoint Presentation we received. Andrews said she has asked Executive Director Systemic Advocacy Rena Girinakis to help get a response.

Meeting Adjourned

Next meeting: Thursday, August 15, 2013 2 p.m. ET; 1 p.m. CT; Noon MT; 11 a.m. PT; 8 a.m. HT

**Taxpayer Communications Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
June 20, 2013**

Designated Federal Officer

- Jimerson, Susan Seattle, WA Designated Federal Officer

Committee Members Present

- Bilancia, Rich Loveland, CO Member
- Boyea, Ralph Keaau, HI Member
- Campbell, Stephanie Farmington, MO Member
- Davine, Jeff Los Angeles, CA Member
- Edwards, Philessia Austin, TX Member
- Kanack, Suze Riverton, WY Member
- Lees, Rodger Riverton, WY Vice-Chair
- Marshalek, Mark Powell, OH Member
- Sorich, Sam El Dorado Hills, CA Member
- Thomson, Mary Jo Oklahoma City, OK Member
- Wechter, Thomas Glencoe, IL Member
- Webster, Walter Las Cruces, NM Member
- Welles, Dawn Milwaukee, WI Member

Committee Members Absent

- Bekolo, Paulette Morrisville, NC Member
- Flanders, Seth Emmaus, PA Chair
- George, Philip St. George, UT Member
- Chris Petersen-Grosse Elkhart, IN Member
- Kelly, Eileen Wilmette, IL Member
- Swartz, Mike Austin, TX Member
- Watson, Theresa Jacksonville, AR Member

TAP Staff

- Andrews, Sheila Indianapolis, IN TAP Director
- Robb, Patti Milwaukee, WI Program Analyst
- Smiley, Ellen Milwaukee, WI Program Analyst
- Maine, Kymberly Seattle, WA Note Taker

Program Owner/SME

- Marsh, Nadine Washington, DC Tax Analyst

TAS/Systemic Advocacy/SME

- Johnson, Deana Business Identity Theft
- Stevens, Vicki Public Affairs Specialist
- Angeloff, Tamara Online Payment Agreement

Opening/Welcome

Susan Jimerson opened the meeting.

Roll Call

Quorum met.

Review and Approve May Minutes

The May minutes were approved by consensus as submitted.

Public Comments

None

DFO/Office Report – Susan Jimerson/Sheila Andrews

Susan Jimerson announced that Dan Reilly resigned from TAP due to conflicts affecting his ability to perform TAP work. The replacement for North Dakota will be part of the recruitment package.

TAP will have 29 new members reporting in December. The selection package is being reviewed and will be sent to the Executive Director Systemic Advocacy.

Watch for an email with the yearly Tax Check Waiver. Please complete the form and return it – remember, if you filed a joint return, your spouse needs to sign the waiver too.

There are two furlough days scheduled in July; July 5 and July 22, 2013. The IRS will close on both those days and the staff will not be available.

Sheila Andrews had a phone conference with Principle Deputy Commissioner Daniel Werfel and the three main topics that will be spotlighted in his report due out next week are tax exempt organizations, public trust, and looking at other areas of the IRS for other corrective measures. He is very sensitive to the budget situation.

Chair Report

Rodger Lees reported the Joint Committee discussed the National Taxpayers Advocate June Report to Congress.

The planning for the annual regional training meetings is moving along. The subcommittee is focusing on the comments and suggestions from the new members and are revising some of the training classes. The team is aware of the need for more TAPSpace training for both new members and returning members.

The Joint Committee reviewed the IRS responses to the 2012 elevated referral from the Small Business Self Employed (SB/SE) Decreasing Non-Filers Project Committee. The IRS indicated that they would consider 15 of the 24 recommendations. Nine recommendations were rejected for various reasons.

Subcommittee Report Outs

- **Online Payment Agreements, 26467**

Walter Webster reported the subcommittee was putting the final touches on the referral. They received one suggestion that would not change the context of the issue. Consensus to elevate to the attorney advisors.

- **Identity Theft of Business, 26418**

Analyst Patti Robb reported the subcommittee finalized their referral and are presenting it for full committee approval. Consensus to elevate to the attorney advisors.

- **Website, 26381**

Stephanie Campbell presented the HTML referral for full committee approval. Consensus to elevate to the attorney advisors.

- **Taxpayer E-Fax, 26419**

This issue is on hold.

Status of Elevated Issues

Jimerson said Issue 26409, Technology for Outreach and Education, and Issue 23725, IRS Website Chat Feature are back from attorney advisor review and are now with the Joint Committee Quality Review subcommittee.

Internal Communications

Mark Marshalek said the almost final draft of the 2012 annual report is in review and will be discussed at their next meeting. The June TAP Newsletter is pending Joint Committee approval before being sent to the full Panel.

Marshalek said Jackie Rollins prepared a thirty-second video to provide an introduction to TAP. It's posted on the TAP Facebook page as well as his personal Facebook page. Please view the video and feel free to share.

Quality Review Subcommittee

Thompson said the subcommittee has been very busy with all the various referrals coming through for review. She is getting familiar with the Style Guide and how to properly complete the referral. She recommended more training for new members at the annual regional meetings on how to complete a referral.

The TAP Style Guide was issued to all members in their binders at the annual regional meeting. Robb said she would send the style guide to Committee members via email.

New Issues Screening Report

Sam Sorich reported on the following:

New Issues:

- Issue 26294, Electric Library Accessibility on New IRS Website

The subcommittee is unsure of what is meant by electronic library. Staff tried to find out who submitted the issue but were unsuccessful. The subcommittee recommended dropping this issue due to lack of information.

Consensus to drop.

- Issue 26319, Free File, Cannot File Multiple W-2's

The taxpayer said he was unable to file electronically using Free File due to having several Forms W-2, *Wage and Tax Statement*. The subcommittee tested the software and found this to be incorrect.

Consensus to drop.

- Issue 26338, Online EIN Assistant

The IRS computer system is taken down at the end of every year for maintenance, which made it difficult for taxpayers trying to obtain their Employer Identification Number (EIN). Ellen Smiley said calling the phone number still worked to get an EIN but the wait time is long.

Vicki Stevens provided more background on the issue, stating the computer system has to be taken down during that time to prepare the system for the new tax year with the new tax laws.

Consensus to work the issue.

- Issue 26349, Electronic Federal Tax Payment System (EFTPS) Notification Enrollment Looks like Junk Mail

When a company enrolls for EFTPS, they receive the enrollment number and PIN in the mail. The letters look like junk mail, which can cause them to throw the letters away

Consensus – Is this an IRS issue or is it an Financial Management Service (FMS) issue? Further research is needed. Keep in parking lot until we get more information.

- Issue 26783, Website: Fillable Forms should be able to compute

The taxpayer wants to see computing fillable forms so the taxpayer would not have to make any calculations.

Consensus to drop.

The Committee quickly reviewed the status of issues reassigned from the general parking lot as well as the issues in the Taxpayer Communications Parking Lot.

2013 Taxpayer Communications Committee Parking Lot:

- Issue 26380, Preparer Testing

Keep in Parking Lot

- Issue 26527, Identity Theft Fraud – Address Verification

The use of Social Security numbers when trying to verify a taxpayer's address could increase tax fraud.

Consensus: Issue associated with the ID Theft Taskforce

- Issue 26829, E-file – Process for sending additional information

With E-file there is no easy way for taxpayers to send in additional information once they have E-filed.

Consensus to make active.

Form New Subcommittees

Smiley and Robb will send information and solicit interest in working specific issues. New subcommittees will be formed using the responses. Seth Flanders and Lees will fill in any holes as appropriate.

Closing

The meeting was adjourned.

Next meeting: Thursday, July 18, 2013, 2 p.m. ET; 1 p.m. CT; Noon MT; 11 a.m. PT; 8 a.m. HT

- Christie Jones Online Payment Agreement

Opening/Welcome

Susan Jimerson opened the meeting.

Roll Call

Quorum met.

Review and Approve March Minutes

The March and April minutes were approved by consensus as submitted.

DFO/Office Report

Susan Jimerson said the offices are heavily involved in interviewing potential Panel members. TAP is also going through realignment; some staff will be going to Systemic Advocacy. TAP will continue to function as normal and you probably won't even notice the changes.

Sheila Andrews said the first IRS furlough day is next week Friday, May 24, and staff is prohibited from working.

Chair Report

Rich Bilancia talked to Andrews about how to better understand our involvement with IRS and the IRS mandated affordable health care act. We are advisors to IRS at large.

We are proceeding to work on the annual report and are almost in the final stages. The report will go through several final internal reviews and then will go to an outside review before publishing.

Bilancia mentioned the email he sent regarding the current IRS issue hitting the press. He asked for the member's comments and feedback and asked them to sit tight and wait till all the facts are in and then study the process. Treat this just like any other issue collected through outreach. Please remain committed to improving the IRS. Bilancia will review all the comments with TAP staff. The Joint Committee will also discuss to see how/if we can get involved.

Rodger Lees said he joined the Joint Committee call and there was a lot of discussion and praise for the Internal Communications Committee Newsletter. Suze Kanack and Mark Marshalek were instrumental in the development, creating, and issuing the Newsletter.

Bilancia said the Joint Committee is also supervising work of the newly created survey committee. The compiled responses to the survey will be used to plan training during the TAP regional meeting in December. With the realignment and now that TAP reports to Systemic Advocacy (SA), we may be able to start working on legislative issues. However, we don't want to be viewed as a lobbying group; we want to continue our work as TAP.

Lees talked about the TAP-wide outreach report from Joint Committee call. He suggested newer members try to participate in at least one Joint Committee call. Everyone is welcome to join any and all calls. It's a really good way to connect with all the different committees and teams within TAP.

Public Comments

None

Training During Annual/Regional Meeting

Lees said this topic is regarding the training you received during regional meeting in Oakland. We wanted to give you some time and then follow up to see what problems you are encountering or comments you may have regarding the training. Did the training materials help you? Is there an area where you need more information? Suze Kanack said she needs to spend more time using TAPSpace. There is a lot of good information there. It helps you understand how other committees work? She feels staff should place more emphasis on TAPSpace. Everyone needs to take the time to browse. She noted the Webinar sessions found on TAPSpace are from 2011; is there anything more recent? Andrews said she will think about updating some videos. Ellen Smiley pointed out the videos or webinars are from the year we didn't have a face-to-face meeting at all.

Walter Webster worked with survey committee and said there were some good comments and suggestions. Will they be used to improve the next regional meeting? Bilancia said the compiled notes were handed to the planning committee to incorporate as much as they can for the upcoming regional meeting. The planning committee will report directly to the Joint Committee who will share the information with the full membership.

Lees added if you have additional comments or suggestions, send them to Robb and Smiley. Please don't hesitate to give us your feedback.

Ralph Boyea said November and December are rough months for the face-to-face meetings. Maybe October would be better – just something to think about.

TAP Project Referral Process

Lees explained the project referral process. There are many different steps in the process. Following is the process of elevation:

1. Research
2. Draft referral is written
3. QR by subcommittee
4. QR by the full committee
5. Goes to manager
6. Manager sends to attorney advisor for comments

7. If comments are made, referral is returned to the committee
8. Manager sends to JC QR
9. QR sends back to committee for revisions
10. Manager sends to JC for elevation

The attorney advisor will provide the National Taxpayer Advocate's point of view.

Subcommittee Report Outs

Technology for Outreach and Education

The Committee reviewed the draft referral. We completed it after discussions with the IRS Stakeholder Liaison and it's actually more of a synopsis. The report has already been provided to the Stakeholder Liaison. Lees said he sent a few comments regarding the last paragraph.

Consensus to elevate with changes.

Online Payment Agreements

Webster said the subcommittee met yesterday and hopes to have a draft referral for full committee approval during the June meeting.

Taxpayer E-Fax

Eileen Kelly said they received a PowerPoint presentation and are hoping to have a call with the author as we have questions. We hope to have a draft referral completed after that call but in meantime, we would like to start work on a new issue.

Identity (ID) Theft of Business

Mike Swartz said a draft a referral is completed. The subcommittee met with an IRS task force about a month ago and they agreed with the assessment. The referral is going through subcommittee review right now. We will have the final draft for full Committee review in June. We would like to move on to another issue as well.

Website Subcommittee

Stephanie Campbell said the subcommittee is working on several issues. The final draft for the Issue 23723, *IRS Chat Feature*, is presented for full Committee approval today. Our recommendation is to move the chat feature to a more prominent position on the IRS homepage.

The referral for Issue 26381, *HTML Format*, is ready for internal quality review. Lees suggested deleting the second sentence of the project statement.

Consensus to move forward with this small change.

Internal Communications Committee

The May newsletter is coming along and the 2012 Annual Report is reaching home stretch.

Quality Review Subcommittee

Mary Jo Thomson reviewed one report this past month and has another one waiting. Webster reviewed two referrals in April but added the quality review team needs more training or instructions.

New Issues Screening Report

- Issue 26933, *Free Filing Limitations* – Submitter wants to be able to scan return information requested and attach to the return instead of entering the information directly onto the return. Bilancia said the taxpayer can cut from a PDF file and paste into the FreeFile form. This is a technology challenge and he's not sure Turbo Tax can even do this.

Recommendation: Refer this to the Tax Forms and Publications Committee.

Issues Reassigned To TCC From General Parking Lot

- Issue 22206, *Don't Print Annual TAP Report*

Recommendation: Consensus to drop.

- Issue 22207, *Direct Complaints to TAP*

Recommendation: This should be an ongoing effort for the Internal Communications Committee.

- Issue 22377, *TAP Presentation at Tax Forum*

Recommendation: This is already being done – refer to Outreach Subcommittee.

- Issue 23528, *IRS2GO, App is Needed for Windows Phone*

Recommendation: Windows represents 1.2% of the global cell market. It has to be at least 10% to be considered. Drop.

- Issue 23732, *Publish Address and Numbers of IRS Functions*

Recommendation: Drop.

Mentor/Mentee

No report.

Outreach

Lee said the Committee continues to do a large volume of outreach activity. Ralph Boyea reported eight outreach events. We touched almost 34,000 people in March and another 24,000 in April. Mary Jo Thompson took the lead in April.



However, roughly half of the Committee members are not doing or maybe not reporting their outreach and it's a concern since outreach is the main source of issues for TAP. Please remember to submit your report each month.

Andrews echoed what Lees said about the importance of outreach.

Boyea added he sent an email to Hilo University offering to speak at classes and has already received a couple responses and will be speaking to two different classes.

Closing

Meeting Adjourned.

Next meeting: Thursday, June 20, 2013
2 p.m. ET; 1 p.m. CT; Noon MT; 11 a.m. PT; 8 a.m. HT

**Taxpayer Communications Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
April 18, 2013**

Designated Federal Officer

- | | | |
|-------------------|-------------|----------------------------|
| • Jimerson, Susan | Seattle, WA | Designated Federal Officer |
|-------------------|-------------|----------------------------|

Committee Members Present

- | | | |
|-----------------------|---------------------|------------|
| • Bilancia, Rich | Loveland, CO | Member |
| • Campbell, Stephanie | Farmington, MO | Member |
| • Davine, Jeff | Los Angeles, CA | Member |
| • Edwards, Phileasia | Austin, TX | Member |
| • Flanders, Seth | Emmaus, PA | Chair |
| • Kanack, Suze | Riverton, WY | Member |
| • Kelly, Eileen | Wilmette, IL | Member |
| • Lees, Rodger | Riverton, WY | Vice Chair |
| • Marshalek, Mark | Powell, OH | Member |
| • Sorich, Sam | El Dorado Hills, CA | Member |
| • Swartz, Mike | Austin, TX | Member |
| • Webster, Walter | Las Cruces, NM | Member |

Committee Members Absent

- | | | |
|-------------------------|-------------------|--------|
| • Bekolo, Paulette | Morrisville, NC | Member |
| • Boyea, Ralph | Keaau, HI | Member |
| • George, Philip | St. George, UT | Member |
| • Chris Petersen-Grosse | Elkhart, IN | Member |
| • Reilly, Dan | Wahpeton, ND | Member |
| • Thomson, Mary Jo | Oklahoma City, OK | Member |
| • Watson, Theresa | Jacksonville, AR | Member |
| • Wechter, Thomas | Glencoe, IL | Member |
| • Welles, Dawn | Milwaukee, WI | Member |

TAP Staff

- | | | |
|-------------------|------------------|-----------------|
| • Andrews, Sheila | Indianapolis, IN | TAP Director |
| • Robb, Patti | Milwaukee, WI | Program Analyst |
| • Smiley, Ellen | Milwaukee, WI | Program Analyst |
| • Gabriel, Lisa | Milwaukee, WI | Program Analyst |
| • Brown, Kevin | Washington, DC | Secretary |

Program Owner/SME

- | | | |
|-----------------|----------------|-------------|
| • Marsh, Nadine | Washington, DC | Tax Analyst |
|-----------------|----------------|-------------|

TAS and Systemic Advocacy

- Sanders-Walsh, Carolyn
- Angeloff, Tamara
- Deana, Johnson

Tampa, FL

Senior Tax Analyst
Online-Payment Agreement
Business Identity Theft

Opening/Welcome

Seth Flanders opened the meeting.

Roll Call

Quorum met.

Review and Approve March Minutes

The Committee did not have quorum at this point, so the March minutes will be reviewed and approved during the May call.

Small Business Taxes – The Virtual Workshop

Carolyn Sanders Walsh, SB/SE Senior Tax Analyst said the feedback provided was great. They already implemented a lot of changes and will do others in the future.

The workshop is now live on the IRS video portal at:

<http://www.irsvideos.gov/SmallBusinessTaxpayer/virtualworkshop>

In the future you will be able to scroll the “tear off” and will be able to view the video and the transcript at same time. The full-screen option is still not available but will be in the future. The type face has been upgraded to more professional style. The search option is not available. We have gone to progressive downloads so you cannot click on a specific portion of the video – for now. If you have a lack of bandwidth, you can download the video. We fixed the error in the references and fixed the sound as well. The comments work now too. Look at screen below the video; if you turn off the transcript and view only, the lessons will show all the publications referenced. We are also working on updating the lesson structure. Future upgrades planned:

- an alert that advises the user that a tax law or procedure has changed as of a certain date;
- Spanish and Mandarin translations,
 - Other languages will follow, including Vietnamese, Korean, Russian, Cantonese and French;
- a design for classroom delivery;
- a feature to play other video from the IRS video portal to enhance learning on a topic; and
- accessibility across a variety of platforms, including tablets and smart phones.

Flanders thanked Sanders Walsh for the opportunity to provide input and said we were glad we were able to provide value. Sanders Walsh said if you have more input, send the information to Patti Robb in an email and she will forward.

Action item: Robb will send out the new URL link to the Committee members.

DFO/Office Report

Susan Jimerson said recruitment is over and we finished with 407 final applications. They have all been ranked and we are now in the process of preparing for interviews. We will be asking for members to assist in the interview process. Watch for an email coming your way soon.

Chair Report

TAP Chair Rich Bilancia will be hosting the first TAP quarterly meeting on Monday, April 22. There will be a lot of valuable information shared so please join if you can.

We asked for a lot of many volunteers to help design the annual meeting. There is also a subcommittee working on feedback from surveys done last year. More information will be coming out in the next few weeks.

We are still working on a protocol to contact submitters of issues to let them know the status of their suggestion(s).

Public Comments

None

Subcommittee Report Outs**Technology for Outreach and Education**

Suze Kanack drafted the referral and sent it to Ellen Smiley for initial review. It will go to the internal quality review subcommittee before being presented to the full Committee.

Online Payment Agreements

Walter Webster said the subcommittee met yesterday. They are beginning initial work on a draft referral but are still waiting for more information. We received the screen shots we asked for but are still waiting for the toll-free scripts. We set May 15 as our own deadline for the final draft of the referral and are hoping to present it to the full Committee on the June 20 conference call.

Taxpayer E-Fax

Eileen Kelly said we are still waiting for a call with a subject matter expert but the IRS has been unable to identify one. We would like to write up something soon. The PowerPoint Smiley sent out looks like it has some very good information. Sheila Andrews will talk with EDSA Rena Girinakis to see if she can tell us who produced the presentation and ask them to talk to the subcommittee. Kelly added they are targeting a draft by the end of May as well.

Identity (ID) Theft of Business

Mike Swartz said he sat in on an identity theft task force call a couple weeks ago. There is a call with a subject matter expert next week and hopefully we will get more information. Either we will define a definite focus to work on or we will write up the referral and move on.

Website Subcommittee

Philessia Edwards said the subcommittee wrote a draft referral. It has to go through the internal quality review process and then will be presented to the full Committee.

Internal Communications Committee

Mark Marshalek said the 2012 annual report is in a holding pattern due to the lack of responses from the IRS to last year's recommendations. Once we have the responses, we will do a final review and add pictures and graphics. The hope now is to have an updated version for review by Tuesday, April 23.

Marshalek said he has been posting updates on the TAP Facebook page almost on a weekly basis. If you have not signed up for the TAP page, please do so.

The monthly newsletter is almost complete and will be out by the end of the month.

Quality Review Subcommittee

No report.

New Issues Screening Report

Sam Sorich said the New Issues Screening Subcommittee reviewed two new issues this month and following are their recommendations:

Issue #26829, *E-file – Process for Sending Additional Information* – If taxpayers are filing electronically, and there ends up being additional information needed, the IRS should respond electronically. It doesn't make sense to have to wait weeks for a letter & weeks after information is sent in to be processed. It would be easier on taxpayers & would in turn relieve some of the calls they are receiving.

Large Business and International (LB&I) has the ability to send information via email, but the process used is not viable for an individual taxpayer. This is an issue to pursue – explore why restrictions are in place and if they are valid and appropriate – and how to make the information more accessible. Flanders said this should be placed in the parking lot and when one of the referrals is completed, that subcommittee could start working this issue. This is a perfect example why the Taxpayer Communications Committee was formed.

Consensus to put in the Parking Lot.

Issue #26831, *Communication – Return Receipt Should be Sent* – The taxpayer would like the IRS to communicate better with the individual taxpayer. For instance, when paper filing is made, a notice of receipt card could be sent to the taxpayer confirming receipt of the filing. Also, when a promise of calling a filer is made, it should be done. When calling the IRS, perhaps a triage menu can be presented so that one is not passed around to two or three areas before the caller receives the relevant information.

There are actual three separate issues here. The first issue has some merit but it's not practical and would be quite expensive to implement. The taxpayer does have the option to use registered or certified mail.

Consensus to Drop.

The operating procedure of the IRS is to return calls if they say they will. It would be difficult to track this.

Consensus to Drop.

The IRS needs to improve the menu available to callers so they aren't bounced around.

Consensus to reassign to the Toll-Free Project Committee.**The following issue was in the parking lot waiting for more information.**

Issue #26831, *Identity Theft Fraud – Address Verification* – A taxpayer's address is changed when they submit their tax return. The only verification is that the Social Security Number Matches. This opens all taxpayers for Identity Theft Fraud. An ID thief sends in a tax return with the correct social security number and uses a different address. This updates the IRS computer system. The thief will now receive correspondence from Internal Revenue and even the taxpayer's refund. The only way a taxpayer knows they are a victim of ID theft is when they submit their tax return and they are told that it has already been submitted. There are millions of taxpayer identity fraud cases waiting to be resolved. There is an IRS Identity Protection Specialized Unit (IPSU). This Unit is so overwhelmed that they have upfront personnel giving lip service to taxpayers promising them a letter or a call will come and nothing ever happens. If a taxpayer has grown weary of the promises and ask who they can appeal to for help they are then referred to the Tax Advocate Office. This Office assists the taxpayer in getting their tax return resolved and getting their refund. One simple solution would be to put a comment in the instructions for completing your tax return document that would state that if you have a change of address that you need to check a certain block and then attach a copy of your social security card for verification of your change of address. This would give the taxpayer protection against ID Theft and would save millions of hours and dollars. There are 3 levels of IRS employees handling ID Theft Fraud. The IPSU, the upfront personnel and the Tax Advocate Office. If a verification of an address was included in the tax return millions of problems could be eliminated and hundreds of IRS jobs could be returned to processing tax returns.

This issue was discussed during the March conference call and it was decided to put it on hold until Robb found out if one of the ID theft task forces was working a similar issue. If not, TAP will write up a recommendation for an immediate intervention and elevate it to Systemic Advocacy. Robb exchanged emails with the lead of one of the task forces and he said they would look at the issue.

Bilancia is going to write several suggested recommendations and will forward to Robb and Smiley.

Consensus – send to SA as an immediate intervention if we hear the task force will not work.



Mentor/Mentee

No report.

Outreach

Rodger Lees said 29 outreach events were reported and reached about 34,000 people. If you are having a problem doing outreach, let him know what barriers are encountered.

Closing

Meeting Adjourned.

Next meeting: **Thursday, May 16, 2013**
 2 p.m. ET; 1 p.m. CT; Noon MT; 11 a.m. PT; 8 a.m. HT

**Taxpayer Communications Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
March 21, 2013**

Designated Federal Officer

- | | | |
|-------------------|-------------|----------------------------|
| • Jimerson, Susan | Seattle, WA | Designated Federal Officer |
|-------------------|-------------|----------------------------|

Committee Members Present

- | | | |
|-----------------------|---------------------|--------|
| • Bilancia, Rich | Loveland, CO | Member |
| • Boyea, Ralph | Keaau, HI | Member |
| • Campbell, Stephanie | Farmington, MO | Member |
| • Davine, Jeff | Los Angeles, CA | Member |
| • Edwards, Philessia | Austin, TX | Member |
| • Flanders, Seth | Emmaus, PA | Chair |
| • George, Philip | St. George, UT | Member |
| • Kanack, Suze | Riverton, WY | Member |
| • Kelly, Eileen | Wilmette, IL | Member |
| • Marshalek, Mark | Powell, OH | Member |
| • Sorich, Sam | El Dorado Hills, CA | Member |
| • Thomson, Mary Jo | Oklahoma City, OK | Member |
| • Watson, Theresa | Jacksonville, AR | Member |
| • Webster, Walter | Las Cruces, NM | Member |

Committee Members Absent

- | | | |
|-------------------------|-----------------|------------|
| • Bekolo, Paulette | Morrisville, NC | Member |
| • Lees, Rodger | Riverton, WY | Vice Chair |
| • Chris Petersen-Grosse | Elkhart, IN | Member |
| • Reilly, Dan | Wahpeton, ND | Member |
| • Swartz, Mike | Austin, TX | Member |
| • Wechter, Thomas | Glencoe, IL | Member |
| • Welles, Dawn | Milwaukee, WI | Member |

TAP Staff

- | | | |
|-------------------|------------------|-----------------|
| • Andrews, Sheila | Indianapolis, IN | TAP Director |
| • Robb, Patti | Milwaukee, WI | Program Analyst |
| • Smiley, Ellen | Milwaukee, WI | Program Analyst |
| • Gabriel, Lisa | Milwaukee, WI | Program Analyst |
| • Maine, Kymberly | Seattle, WI | Secretary |

Program Owner/SME

- | | | |
|-----------------|----------------|-------------|
| • Marsh, Nadine | Washington, DC | Tax Analyst |
|-----------------|----------------|-------------|



TAS and Systemic Advocacy

- Stevens, Vicki
- Sanders-Walsh, Carolyn

Seattle, WA
Tampa, FL

Public Affairs Specialist
Senior Tax Analyst

Opening/Welcome

Susan Jimerson opened the meeting.

Roll Call

Quorum met.

Review and Approve February Minutes

The January minutes were approved by consensus with minor changes.

DFO/Office Report

Jimerson said recruitment is going very well. As of right now, we have 232 completed applications and another 533 in progress. Recruitment ends on April 1. We have several teams set to review and rank the applications once recruitment closes.

There will be two TAPSpace training sessions next week – March 27 and March 28. Please make sure you take one or the other of the classes. It will give you a lot of insight as to what's on the website and where to find it.

Chair Report

Rich Bilancia took the lead.

The Joint Committee approved the formation of two Ad Hoc committees had been formed to begin the annual training planning and training development. One committee is focused specifically on the surveys to ensure that TAP is doing what is important to the membership.

Due to the budget constraints, TAP will be unable to hold one meeting for the full panel, but the six meetings will be held in three different regional locations. We will follow the 2012 format and will utilize webcast training for the general sessions on the overlap day of the meetings.

We are in the process of planning conference calls for the full TAP membership on a quarterly basis. More to come.

Public Comments

None

Small Business Taxes – The Virtual Workshop

SB/SE Tax Analyst Carolyn Sanders-Walsh joined the call to discuss the status of the Small Business Taxes Virtual Workshop. They took the website down and started implementing changes due to the comments received so far. The streaming video was changed to progressive downloads so it will be in a chunky format now. The website should be back online in another day or two. You should notice a difference in the way it looks and

runs. We would still like you to review the lessons and provide us with your observations and comments. If you have already provided comments on your assigned lesson, you don't need to do it again. However, if you want to, please do so. We would like to hear your observations from the last version.

Ralph Boyea said the progressive downloads should work better in rural areas. He will review his lesson and provide his comments.

Patti Robb will send out the new link to the website soon. Please send your lesson comments to her by close of business on Thursday, March 28. She will consolidate the responses and send to Sanders-Walsh on April 1.

Subcommittee Report Outs

Technology for Outreach and Education

Bilancia said the subcommittee attended a WebInterpoint demonstration. WebInterpoint was developed for Stakeholder Liaison to hold webinars for practitioners. The presentation showed how the system works, from registration to actually attending a webinar session.

Suze Kanack is working on the first draft of the subcommittee's referral. It should be ready for the full Committee's review and comments in a few weeks.

Action item: Kanack will write first draft of the Technology for Outreach and Education referral.

Online Payment Agreements

Walter Webster said the subcommittee met yesterday. They are still waiting for requested information so will work on their initial thoughts for now. Mary Jo Thomson will start writing the draft referral. The team will review it before it's presented to the full Committee for comment. David Chapman had indicated news alerts were already in the planning stage.

Action item: Thomson will write first draft of the Online Payment Agreements referral.

Taxpayer E-Fax

Eileen Kelly said the IRS asked us to look at E-Fax as some employees have it and many do not. Since getting this assignment, we found that a great deal of employees now have this technology and it will soon be rolled out to all (except legal areas). We are doing basic research at this time. It is obvious the IRS does not need TAP's approval of E-Fax as that ship has already sailed. The IRS needs to find other ways to share documents as not all taxpayers have faxing technologies. We feel we should start pondering newer technologies since faxing is old technology. Where do we go with this now? Bilancia feels TAP should complete the response in acknowledgement to the IRS and include more long-term suggestions. Kelly agreed it warrants a write-up since they already put in a fair amount of time on this issue.

Identity (ID) Theft of Business

Robb said the subcommittee received an invitation to join an Identity Theft Task Force

conference call with Excise and Return Integrity and Correspondence Services (RICS). Hopefully we will get some good information from them as we still don't have a clear cut scope.

Website Subcommittee

Stephanie Campbell said the subcommittee is meeting on Tuesday, March 26, and they hope to have a subject matter expert on the call. There is a chat feature on the IRS website now, but it is buried and not visible unless you happen to dig in the right spot.

Internal Communications Committee

Mark Marshalek said we are coming close to having a final draft of the annual report. Most reports were updated and now we need to plug in some final statistics.

He has been posting updates on the TAP Facebook page almost on a weekly basis. If you have not signed up for the TAP page, please do so.

The February/March version of the TAP Newsletter is coming together nicely. Kudos to Suze Kanack, Russ Pool, and Steve Berkey.

Quality Review Subcommittee

Mary Jo Thomson completed reviews on referrals from the Tax Forms and Publications Project Committee.

New Issues Screening Report

Sam Sorich said the New Issues Screening Subcommittee reviewed one issue this month and following is their recommendation:

Issue #26527, *Identity Theft Fraud – Address Verification* – A taxpayer can change their address when they submit their tax return simply by writing the new address at the top. The only verification is that the social security number matches. This opens all taxpayers for identity theft fraud.

Consensus to put in the Parking Lot. Staff will follow-up with the ID theft task forces to see if they are currently addressing this particular issue. If so, associate with their issue.

Mentor/Mentee

Marshalek said he emails his mentee a couple times each month. This does not have to be a formal process. Reach out to your mentor or mentee.

Outreach

Bilancia strongly encouraged everyone to continue to do outreach. We are not at a level Colleen Hitchcock, TAP Vice Chair, feels is significant. He told members to review the TAP dance from the Outreach Toolkit and utilize it to separate TAS from TAP as they are frequently confused. The TAP goal is to improve IRS service and products. Talk to everyone; friends, family, neighbors, etc. Take the time to report these all as outreaches. Please complete your timesheets as well.



The PowerPoint Presentation in the Toolkit on TAPSpace is out of date right now but is in the process of being updated by Program Analyst Tim Shepard. You can also customize this presentation for yourself or your target audience.

Closing

Meeting Adjourned.

Next meeting: **Thursday, April 18, 2013**
 2 p.m. ET; 1 p.m. CT; Noon MT; 11 a.m. PT; 8 a.m. HT

**Taxpayer Communications Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
February 21, 2013**

Designated Federal Officer

- | | | |
|---|-------------|----------------------------|
| <ul style="list-style-type: none"> • Jimerson, Susan | Seattle, WA | Designated Federal Officer |
|---|-------------|----------------------------|

Committee Members Present

- | | | |
|---|---|---|
| <ul style="list-style-type: none"> • Bekolo, Paulette • Bilancia, Rich • Boyea, Ralph • Campbell, Stephanie • Edwards, Philessia • Flanders, Seth • George, Philip • Kanack, Suze • Kelly, Eileen • Lees, Rodger • Marshalek, Mark • Sorich, Sam • Thomson, Mary Jo • Watson, Theresa • Wechter, Thomas • Webster, Walter | <ul style="list-style-type: none"> Morrisville, NC Loveland, CO Keaau, HI Farmington, MO Austin, TX Emmaus, PA St. George, UT Riverton, WY Wilmette, IL Riverton, WY Powell, OH El Dorado Hills, CA Oklahoma City, OK Jacksonville, AR Glencoe, IL Las Cruces, NM | <ul style="list-style-type: none"> Member Member Member Member Member Chair Member Member Member Vice – Chair Member Member Member Member Member Member |
|---|---|---|

Committee Members Absent

- | | | |
|--|---|--|
| <ul style="list-style-type: none"> • Davine, Jeff • Chris Petersen – Grosse • Reilly, Dan • Swartz, Mike • Welles, Dawn | <ul style="list-style-type: none"> Los Angeles, CA Elkhart, IN Wahpeton, ND Austin, TX Milwaukee, WI | <ul style="list-style-type: none"> Member Member Member Member Member |
|--|---|--|

TAP Staff

- | | | |
|--|--|--|
| <ul style="list-style-type: none"> • Robb, Patti • Smiley, Ellen | <ul style="list-style-type: none"> Milwaukee, WI Milwaukee, WI | <ul style="list-style-type: none"> Program Analyst Program Analyst |
|--|--|--|

Program Owner/SME

- | | | |
|---|----------------|-------------|
| <ul style="list-style-type: none"> • Marsh, Nadine | Washington, DC | Tax Analyst |
|---|----------------|-------------|

TAS and Systemic Advocacy

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|--|--|--|
| <ul style="list-style-type: none"> • Stevens, Vicki • Clayton, Keith • Sanders – Walsh, Carolyn | <ul style="list-style-type: none"> Seattle, WA Indianapolis, IN Tampa, FL | <ul style="list-style-type: none"> Public Affairs Specialist Revenue Officer Senior Tax Analyst |
|--|--|--|



- | | | |
|-------------------|---------------|--------------------|
| • Arnold Jolynn | Lanham, MD | Web Services, COTR |
| • Atkinson, David | St. Louis, MO | Web Developer |

Opening/Welcome

Seth Flanders welcomed everyone to the call.

Roll Call

Quorum met.

Review and Approve December Face-to-Face Meeting Minutes

The January minutes were approved by consensus with minor changes.

DFO/Office Report

Susan Jimerson said recruitment opens tomorrow and we will begin accepting applications. Please help promote recruitment and encourage people to apply. TAP will also be recruiting for an international taxpayer. They will represent United States taxpayers living abroad. There will not be a location requirement; they must be a United States citizen living abroad or in the States. We researched and found recruiting an international member falls in line with our current charter.

Flanders noted we received several international issues over the past few years. They have been significant enough to warrant an international member.

Recruitment runs February 22 through April 1.

Chair Report

Flanders said the Internal Communications Committee recently issued the newly developed TAP Newsletter. It has updates from each project committee as well as other important information. Please take time to read it. They also completed a final version of the TAP Bylaws and submitted them to the Joint Committee for approval during their February call.

He also announced that the new permanent TAP Director has been selected; Sheila Andrews. Andrews has been our acting Director for the past month. Welcome!

An Ad Hoc Subcommittee will be created to start planning for the annual regional meeting. Both Andrews and TAP Chair Rich Bilancia will be working with this subcommittee. There was a survey last year and responses received were compiled and will be the basis for planning the annual meeting. An email will be coming out soon asking for volunteers for this subcommittee.

Public Comments

None

Small Business Taxes – The Virtual Workshop

SB/SE Tax Analyst Carolyn Sanders – Walsh joined the call to offer an opportunity to the Committee. She explained the new Small Business Taxes – Virtual Workshop and SB/SE would like to get your feedback on ease of use without giving you any specific guidance. That way it would simulate the actual user experience and help them to make improvements before the official rollout. She would also like to meet with the Committee after the review to talk about user experiences.

Sanders – Walsh provided a list of questions and comments. The total workshop is close to 4 hours long. The longest lesson, Chapter 4, Business in the Home, is about 42 minutes. We would like to get this done in a week to ten days if possible but we don't want this to be too burdensome. We would like your responses by March 7. A link to the workshop will be sent out on Monday, February 25.

There is an introduction and nine lessons and only Lesson 9 is new. We need you to check out the look and feel and the functionality. Please don't worry about punctuation, grammar, actors, technical tax, etc., as the video and transcripts are final. We would like each lesson to be reviewed by at least one TAP member.

First, think about the workshop's overall design. How does it affect the workshop's purpose which is to teach the new small business owner about their tax rights and responsibilities? Do you think the overall product design enhances the learning experience of the user (new small business owners)?

Then think about the specific lesson's appearance and functionality. As far as appearance – does it make you want to start it up and try it out? Lessons can be accessed sequentially or directly; any lesson can be referenced/hyperlinked on IRS.gov pages. As far as functionality – is it intuitive? Does it do what you think it should do? Is there any function that needs an explanation? Were you able to access the features without significant problems? Is there anything you couldn't make work? Did the lesson flow and sync appropriately on your computer?

Finally, do you have any additional recommendations for making the look and feel and/or functionality better, either for the workshop as a whole or for a particular lesson? Please keep in mind, reshooting is very costly and therefore unlikely. Suggestions for design and functional enhancements are welcome.

This is the first iteration of this product. Future upgrades planned:

- an alert that advises the user that a tax law or procedure has changed as of a certain date,
- Spanish and Mandarin translations,
 - Other languages will follow, including Vietnamese, Korean, Russian, Cantonese and French
- a design for classroom delivery,
- a feature to play other video from the IRS video portal to enhance learning on a topic, and
- accessibility across a variety of platforms, including tablets and smart phones.

If you have suggestions for our outreach rollout, please forward those as well. So far, we are planning a You Tube video, tweets, a Headliner, and e – News articles.

Flanders told everyone to expect an email with the link to the workshop, individual lesson assignments, and the list of comments and questions. Once again, please respond no later than Thursday, March 7. Send your responses to Patti Robb and Ellen Smiley.

David Atkinson added they want your feedback because they re-engineered the platform. Now instead of having to make changes to the whole program, they can change portions or add a link to find changes. We can change things without changing the whole video. The way it works is different and we will be able to add the language translations easily.

If you have any questions, please send them to Robb and Smiley and they will send them to Sanders – Walsh. She will respond immediately.

Rodger Lees said this definitely has value. He was on another SB/SE Committee in 2011 and they made recommendations for changes in the original Small Business Taxes Workshop. The IRS implemented almost all of the recommended changes already.

Sanders – Walsh said they will make every effort to implement all the viable suggestions you submit.

Subcommittee Report Outs

- **Technology for Outreach and Educations**

Rich Bilancia said they have been having difficulties making regular contact. They have another call scheduled in about ten days.

- **Online Payment Agreements**

Walter Webster said the subcommittee members went over the Online Payment Agreement application. They identified four topics and are off and running.

1. Educating Practitioners
2. Toll – Free Scripts
3. Review the Online screen shots

4. IRS.gov – establish a link on the professional page (preparers)

- **Taxpayer E – Fax**

Eileen Kelly said they will have an Information Technology (IT) subject matter expert on their next call. They want to talk about E – signature too, but they aren't quite ready. They are thinking about skipping the original E – fax issue itself.

- **Identity (ID) Theft of Business**

Flanders said the subcommittee had a call and are still trying to define their focus. For the time being, they settled on trying to get examples of business ID theft. We asked to be included in the ID theft task force future calls. We are waiting for a response.

- **Website Subcommittee**

Stephanie Campbell said they had their first call this week. They will meet again next week and decide on the subcommittee name and begin to work on two issues; Issue 26381, *Electronic Instruction Format*; and Issue 23725, *Website Chat*.

New Issues Screening Report

Sam Sorich said the New Issues Screening Subcommittee reviewed five issues this month and following are their recommendations:

- **Issue 26232, *ID Theft and Early Returns*** – IRS should delay refunds until document matching is done.

Consensus to Drop – associate with the Systemic Advocacy ID Theft Task Force issue.

- **Issue 26300, *Identity Theft Prevention*** – This man said he developed a plan to prevent identity theft. He was trying to sell his software.

Consensus to Drop

- **Issue 26380, *Preparer Testing*** – This preparer thinks there should be some kind of amnesty for current preparers so they don't have to take the test.

Consensus to put in the TCC parking lot to await the decision on the preparer testing court case.

- **Issue 26381, *Electronic Instruction Format*** – When you look at tax instructions on line, they are in multi – column format. It's difficult to read on a computer.

Consensus to put in Active status. The Website Subcommittee will work this issue.

- **Issue 26393, *Website, Electronic Filing*** – Wants the IRS to provide software to complete all tax returns on the IRS.gov website.

Consensus to Drop.

Mentor/Mentee

Flanders reminded mentors to focus on your relationship. Help each other out – keep it going!

Outreach

Rodger Lees said he received several outreach reports. Please submit your February report by next week. There are plenty of outreach opportunities. If you talk to someone about applying for TAP, that is an outreach. When you get your Small Business Taxes workshop assignment, you could call a local small business and go through it with them. That would be an outreach. Use the Accountant Finder link and look for an accountant in your area. Call one of them to talk about TAP. That would be an outreach.

Lees will send the Accountant Finder link. [www.accountant – finder.com](http://www.accountant-finder.com)

Closing

Jimerson asked the members to let her know if their Local Taxpayer Advocate has or has not contacted them yet.

Meeting Adjourned.

Next meeting: **Thursday, March 21, 2013**
 2 p.m. ET; 1 p.m. CT; Noon MT; 11 a.m. PT; 8 a.m. HT

**Taxpayer Communications Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
January 17, 2013**

Designated Federal Officer

- | | | |
|---|-------------|----------------------------|
| <ul style="list-style-type: none"> • Jimerson, Susan | Seattle, WA | Designated Federal Officer |
|---|-------------|----------------------------|

Committee Members Present

- | | | |
|---|---|---|
| <ul style="list-style-type: none"> • Boyea, Ralph • Campbell, Stephanie • Davine, Jeff • Edwards, Philessia • Flanders, Seth • George, Philip • Kanack, Suze • Kelly, Eileen • Lees, Rodger • Marshalek, Mark • Sorch, Sam • Swartz, Mike • Thomson, Mary Jo • Watson, Theresa • Webster, Walter • Welles, Dawn | Keaau, HI
Farmington, MO
Los Angeles, CA
Austin, TX
Emmaus, PA
St. George, UT
Riverton, WY
Wilmette, IL
Riverton, WY
Powell, OH
El Dorado Hills, CA
Austin, TX
Oklahoma City, OK
Jacksonville, AR
Las Cruces, NM
Milwaukee, WI | Member
Member
Member
Member
Chair
Member
Member
Member
Vice Chair
Member
Member
Member
Member
Member
Member
Member |
|---|---|---|

Committee Members Absent

- | | | |
|---|---|--|
| <ul style="list-style-type: none"> • Bekolo, Paulette • Bilancia, Rich • Chris Petersen – Grosse • Reilly, Dan • Wechter, Thomas | Morrisville, NC
Loveland, CO
Elkhart, IN
Wahpeton, ND
Glencoe, IL | Member
Member
Member
Member
Member |
|---|---|--|

TAP Staff

- | | | |
|--|---|---|
| <ul style="list-style-type: none"> • Robb, Patti • Smiley, Ellen • Kymberly Maine | Milwaukee, WI
Milwaukee, WI
Seattle, WA | Program Analyst
Program Analyst
Secretary |
|--|---|---|

Program Owner/SME

- | | | |
|---|----------------|-------------|
| <ul style="list-style-type: none"> • Marsh, Nadine | Washington, DC | Tax Analyst |
|---|----------------|-------------|

TAS and Systemic Advocacy

- | | | |
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| <ul style="list-style-type: none"> • Stevens, Vicki • Johnson, Deana | Seattle, WA
Covington, KY | Public Affairs Specialist
Identity Theft |
|--|------------------------------|---|

- Angeloff, Tamara Helena, MT Online Payment Agreement

Opening/Welcome

Seth Flanders welcomed everyone to the call. He asked everyone to review the Executive Summary of the Annual Report to Congress by the National Taxpayer Advocate. He added it provides an overview of what the National Taxpayer Advocate (NTA) feels are the most important issues for the Internal Revenue Service (IRS).

Roll Call

Quorum met.

Review and Approve December Face-to-Face Meeting Minutes

The December minutes were approved by consensus with minor changes.

DFO/Office Report

Susan Jimerson said Tiffany Todaro completed her detail as acting TAP Director; Louis Morizio is will be Acting TAP Director until Friday, January 25. Sheila Andrews will be acting TAP Director beginning January 28 until the permanent Director is selected and reports sometime in February or March. The new director will be from outside the IRS.

The recruitment for new members and alternates will be open from February 22 to April 1 this year.

ACTION: Jimerson will check to see if members who are rotating off the Panel are expected to help recruit in their respective area for their replacement.

Chair Report

Flanders said the Internal Communications Committee is currently in the process of finalizing the TAP bylaws. He added they will be sending out a monthly newsletter with an update from each project committee. Their main focus right now is the 2012 TAP Annual Report.

Public Comments

None

Subcommittee Report Outs

Technology for Outreach and Educations

Suze Kanack reported the subcommittee members contacted local people and agencies to find out how they got their continued education information. One said they utilized their software providers. They are still in the process of collecting more information and will meet again in February.

Online Payment Agreements

Walter Webster reported the group has requested quite a bit of information. They received some of it, but are still waiting for more. They want to focus on the online help for the Online Payment Agreement (OPA) website. There is little mention of OPA on the Form 1040, *U.S. Individual Income Tax Return*, and instructions. Education and training is a focus as well. He said they were also looking at the training for tax professionals and the training for Volunteer Income Tax Assistance (VITA) to find out what information is provided.

Taxpayer E – Fax

Eileen Kelly said they discovered E – Fax is old technology in the private sector. Mark Marshalek added he will check with his IT people to get more information regarding the system they use. They are also waiting for more information from Ellen Smiley.

Identity Theft of Business

Mike Swartz reported the group hasn't made much progress. They thought they had an understanding of the focus in December and sent a request for a clarification. They have another call scheduled with a subject matter expert (SME) to get more information. He asked members if they have any examples of business identity theft, please email them to the full subcommittee. Swartz said he will rework their understanding of the preliminary problem and resubmit to the Program Owner for more clarification.

New Issues Screening Report

Sam Sorich said the New Issues Screening Subcommittee reviewed four issues this month and following are their recommendations:

- **Issue 26073, *IRS2Go is Not Secure*** – Sorich explained this issue was about requesting transcripts and protecting taxpayer's privacy. He said the committee considered this issue and did some research by asking IRS staff. He said the committee recommended dropping the issue, because the IRS does protect the privacy.

Consensus to Drop

- **Issue 23725, *Website: Chat Feature Suggested*** – Sorich said the subcommittee members agreed this is an important issue and recognized that a chat feature on the IRS website would provide helpful advice to taxpayers.

Consensus to change to active and create another subcommittee – Electronic Communications to explore the capabilities of the chat feature.

ACTION: Flanders will discuss the details of setting up the new subcommittee with Robb and Smiley.

- **Issue 25498, Payments – Extend the Due Date for International Taxpayers** – The screening subcommittee felt this issue was beyond the scope of the Taxpayer Communications Committee.

Consensus to reassign to the Notice and Correspondence Committee.

- **Issue 25608, Fax – Should be Able to Use Fax Service** – This issue is basically the same as the issue the E – Fax subcommittee is focusing on.

Consensus to associate with the E – Fax issue.

Mentor/Mentee

Flanders reminded all mentors to make contact with their mentee and ensure they were up to speed and doing ok. Stay in touch.

Outreach

Rodger Lees said the Outreach Committee met today and noted there is a lag in reporting outreach and hours. The reports should be submitted to Lees, Robb, and Smiley on a monthly basis. Even if you didn't do any outreach, you should be turning in your committee hours. That being said, remember, outreach is the life blood of TAP.

Each project committee outreach coordinator must turn in their committee's hours to the TAP Vice – chair by the second of each month. He asked that everyone track their hours from the 26 of one month to the 25 of the following month. Lees said he will send a reminder email around the 18 of each month.

He encouraged the members to look at the outreach materials on TAPSpace. He also said the group discussed updating the outreach information provided on TAPSpace.

Closing

The meeting was adjourned.

Next meeting: Thursday, February 21, 2013
2 p.m. ET; 1 p.m. CT; Noon MT; 11 a.m. PT; 9 a.m. HT

Thursday, December 6, 2012

Welcome

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All the members took a moment and did self-introductions.

Flanders told everyone to use their assigned mentor!! They will help this all make sense.

Ellen Smiley announced we will get together in February to ask questions about what was discussed/shared during this meeting. If there is anything you don't understand or if you would like more information, that will be your chance.

Smiley provided a very brief overview of the four standing subcommittees:

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2. Internal Communications (need two members),
3. Screening (need eight members including Flanders and Rodger Lees), and
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Staff Roles and Responsibilities

Smiley and or Robb will email all the pre-read information and the meeting agenda about one week before each scheduled conference call. The information will be posted on TAPSpace as well. Flanders asked that everyone read the information before the call.

The Committee members indicated they would like to see and approve the monthly minutes as quickly as possible. The minutes should be emailed and posted to TAPSpace within two weeks



after each call/meeting. Comments or changes will be provided either via email or TAPSpace. The Committee will review the amended minutes and come to consensus.

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Travel information and rules were explained. If you have any questions or need anything explained, please contact your analysts, Ellen Smiley or Patti Robb.

Everyone will be expected to volunteer to work on one of the four projects assigned to this Committee; Taxpayer E-fax; Online Payment Agreement; Technology in Outreach and Education; and, Identity Theft of Business. Flanders said he is looking for a good balance on each subcommittee.

Everyone should also think about becoming a lead for one of these subcommittees or one of the ad hoc committees.



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Technology in Outreach and Education

Gerry Kelly-Brenner, Senior Stakeholder Liaison

On phone; Lyle Lauterbach, Title, James Kinsey, Title, Nadine Marsh, Program Owner, Vicki Stevens, Title, Dawn Welles, Panel Member

James Kinsey welcomed everyone. Technically, we are part of SB/SE, but they sometimes cross over into W&I since small business owners generally have to file their own taxes as well.

80 percent of all small business use tax professionals so most of our energy goes into working with tax professionals.

Our issue right now is how to reach 57 million taxpayers with only 126 employees. We use technology as much as possible, but we still communicate face-to-face when needed. We offer

webinars and last fiscal year over 58,000 participated. Maybe there are other avenues that we haven't identified yet and are hoping you can help us with that. We already use Twitter, Tumblr (kind of a combination between Twitter and Facebook), Facebook, LinkedIn, E-news for Tax

Professionals/payroll providers/ businesses, and YouTube. We are actually looking for input in two ways to deliver information – in person or using technology. And how can we improve awareness of this information? You all represent a lot of people and have the opportunity to get info from people in your state

We provide the tax professionals with information, they in turn reach out to others and share that information. They also bring back information to IRS – emerging issues. IMRS...system to input items/ issues that come up with tax practitioners. Policy, Practices, and Procedures are issues they can address. Issues get researched and clarified. If there was something you needed information on, would you prefer in person, even if they didn't know the answer. Or would you prefer to have another method to get the right answers out there.

Bilancia said the professionals are not the same as the public and felt this is something the Committee could really work on but not in a few hours. Search engine on irs.gov is not great. Take your content and put it in the places where people will be looking – not IRS. Put it on LinkedIn – not Facebook.

Kinsey said they are looking for a long term recommendation: How to better communicate to a broader audience with less staff.

Visual Communications is responsible for the videos on irs.gov but the different divisions are responsible for providing the people (SMEs) for the presentations.

Dan Reilly said awareness needs to be across population segments. The context is small business and anyone who supports small business. The problem is identifying the audience first and then identifying the appropriate technology. This will all be defined by the message the IRS is trying to convey. He suggested the Census Bureau would have a great deal of demographic information.

Kinsey said practitioners may not be able to find things on irs.gov – maybe put guidelines out there how to search.

Identity Theft of Business

Joe Tiberio, Program Manager, Employment Tax Policy, Small Business/Self Employed

Susan Kennedy, Tax Analyst, called in for Deana Johnson, Local Taxpayer Advocate, Identity Theft Portfolio owner

Sarah Plowman, Sr. Tax Analyst

Vicki Stevens,

Nadine Marsh,

Panel members Philip George and Dawn Welles called in via conference call.

Combined Annual Wage Reconciliation (CAWR) – W-2's filed with the Social Security Administration (SSA) are linked with the Forms 941, *Employer's Quarterly Federal Tax Return*, filed with IRS. When they don't match up one of ten different types of non-match codes is assigned to field.

We found cases where they don't match up but when the examiner begins doing research, they get a response that the employer did not file the W-2 with SSA. We end up closing the examination because the employer does not owe any money.

There is less recognition of business id theft right now. We are still in the early stages of identifying this whole situation. They are typically lower dollar cases.

Reilly asked if we are supposed to come up with solutions or are we to ensure that any resolutions the IRS comes up with does not have a negative impact on taxpayers? Tiberio said the Committee should focus on trying to identify solutions. We would like your input. There is definitely a link between individual ID theft and business ID theft.

One possible recommendation: if someone files a fraudulent return, they get flagged for subsequent years and those refunds are held to offset fraudulent refund money received.

Bilancia said there is no guarantee it would be the same taxpayer in these cases. It could be someone who is the target of id theft.

Tiberio asked that the Committee document some of your ideas and he will evaluation the information. Swartz suggested taking "Identity Theft" out of the name of the Committee.

The IRS setting up an identity theft working group and it just stood up. There are also instances of corporate identity theft using the Form 1120, *U.S. Corporation Income Tax Return*. Another team was set up to look at cases where people file to get an EIN purposely to commit identity theft. The team is looking at cross checking the W-2 with the SSA. They are exploring using a password key or another way to authenticate the W-2s.

Both Bilancia and Swartz feel TAP should be included in the dialog and brainstorming in the meetings with all the newly formed identity theft teams.

Todaro felt it would work better if the teams called in during our conference calls to let us know what they are working on so there is no duplication of efforts. She didn't think they would be open to us attending their meetings.

Bilancia said this is an analogous problem the United States Post Office had. They used postage meters for the mail and devised a three-D barcode with an option so that it can never be used more than once.

Jeff Davine said all you have to do is look on the Guidestar website and all the nonprofit returns are listed; including their EINs. Son an EIN is not hard to get.

Friday, December 7, 2012

Flanders welcomed everyone to the final day of the meeting.

Jimerson said she heard from Joe Tiberio and he was very impressed with the Committee. He will provide more information during the first teleconference in January. More information will come as additional guidance becomes available.

The members broke into working groups.

Report Out

Identity Theft of Business: Swartz

The subcommittee worked on defining the scope / problem statement. We brainstormed and came up with several possible directions to pursue but we are going to ask for more guidance. We have a list of questions for the program owners and will meet again before the full Committee meets on January 17.

Possible direction:

- The fraudulent use of W2s to claim excessive w/h or fraudulent EIC claims
- Related: the improper use of legit, defunct, fictitious EINs to prepare fraudulent w2 and 1099
- List: broad areas within which we might make recommendations
- Strategies to protect EIN
- Protect W2
- Protect Fraud prior to issuing refunds without undue burden
- Determents when fraud is found
- Opportunities to educate employers to alert them of the fraud.

Outreach/Education: Reilly

The subcommittee determined there are two issues to consider:

1. How can we address the shortcomings of the current webinar seminars used for education and CPE credits? Kelly-Brenner will provide more information and we will come up with solutions. After discussions with end-users, we'll present solutions to the full Committee by March.
2. Which technologies can be used to raise awareness for IRS learning opportunities? Once again, After discussions with end-users, we'll present solutions to the full Committee by October

Some groups are already at 80 percent per Kelly-Brenner so we are not going to recommend a lot of effort there. We are looking at things already prepackaged and not



looking for new technologies. Kelly-Brenner will let them know what the measurements of success will be. The IRS is already on board and excited about it.

**Taxpayer Communications Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
December 3 – 4, 2012**

Designated Federal Officer

- | | | |
|-------------------|-------------|----------------------------|
| • Jimerson, Susan | Seattle, WA | Designated Federal Officer |
|-------------------|-------------|----------------------------|

Committee Members Present

- | | | |
|--------------------|---------------------|------------|
| • Boyea, Ralph | Keaau, HI | Member |
| • Flanders, Seth | Emmaus, PA | Chair |
| • Kelly, Eileen | Wilmette, IL | Member |
| • Lees, Rodger | Riverton, WY | Vice-Chair |
| • Sorich, Sam | El Dorado Hills, CA | Member |
| • Thomson, Mary Jo | Oklahoma City, OK | Member |
| • Watson, Theresa | Jacksonville, AR | Member |
| • Webster, Walter | Las Cruces, NM | Member |

Committee Member by Conference Call

- | | | |
|-------------------|----------------|--------|
| • George, Philip | St. George, UT | Member |
| • Marshalek, Mark | Powell, OH | Member |

TAP Staff

- | | | |
|------------------|---------------|---------------------|
| • Tiffany Todaro | Oakland, CA | Acting TAP Director |
| • Robb, Patti | Milwaukee, WI | Program Analyst |
| • Smiley, Ellen | Milwaukee, WI | Program Analyst |

Program Owners by Conference Call

- | | | |
|-----------------|----------------|-------------|
| • Marsh, Nadine | Washington, DC | Tax Analyst |
|-----------------|----------------|-------------|

Guests / Subject Matter Experts (SME) Present

- | | | |
|-------------------|-------------|-----------------------------|
| • Chapman, David | Augusta, GA | Supervisory Revenue Officer |
| • Kassim, Ashraph | Oakland, CA | Group Manager ACS |

Guests/Subject Matter Experts (SME) by Conference Call

- | | | |
|--------------------|-----------------|---------------------------|
| • Cooper, Cynthia | Gainesville, FL | Revenue Officer |
| • Borg, Peter | Oakland, CA | Revenue Officer |
| • Lauterbach, Lyle | Springfield, NJ | Program Analyst |
| • Stevens, Vicki | Seattle, WA | Public Affairs Specialist |

Monday, December 3, 2012

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Meeting adjourned for the day.

Tuesday, December 4, 2012

Increase use of the Online Payment Agreement (OPA) Application presentation:

David Chapman, Supervisor Revenue Officer

The Online Payment Agreement includes an option for an installment agreement. If we can get people new to use the system if they owe money, they can do the agreement themselves.

You can get to the online payment agreement through IRS.gov website. It's easy to get to the online option with three simple clicks.

There are three types of installment agreements:

1. Regular Installment Agreement – the taxpayer mails a regular payment
2. Payroll Deduction – the employer withholds the payment and sends it to IRS
3. Direct Debit Installment Agreement – automatically deducts payment from the taxpayer's account and deposits it directly to the IRS.

Most of this information is included in the PowerPoint presentation presented by David Chapman.

If the balance owed by a taxpayer is \$50,000 or less, they qualify to set up an installment agreement (this includes combined tax, penalties and interest).

The direct deposit installment agreement has a much smaller default percentage and it reduces the cost to the taxpayer. They only pay \$52 to set this up and don't have to use envelopes or stamps.

There will be some 2014 enhancements such as a reduced amount of information requested and the number of pages currently required. The navigation and page presentation has been improved as well.

That was a very quick overview of the payment options.

Ralph Boyea asked why he would use this system when he can go to one of those companies that says they can reduce the amount of tax owed. Chapman replied that is just their marketing. It is essentially an offer-in-compromise (OIC) and not everyone qualifies.

Chapman showed an OPA video. He added a taxpayer can only apply for an OPA if they file a Form 1040, *U.S. Individual Income Tax Return*, and owe less than \$50,000. They can still apply for a payment agreement if they owe more than \$50,000 but not online. Anyone can view this video on IRS.gov video portal and it's a good video. It's a good video for individuals wanting to do an OPA. There is no user fee to set up a 120 day extension. There is a one-time user fee of \$105 when using the option to mail in payments; and a one-time user fee of \$52 for the direct deposit agreement.

If you owe \$25,001 and above, the system will automatically default you to direct deposit.

Part of the issue of people not using the OPA system is that many people still don't own computers. Chapman said there was some marketing done when the application initially went online but not as much as we are currently doing. We have more avenues to do the marketing now.

There was prior marketing for the OPA. We issued a press release, send frequently asked questions to subscribers, and we also posted content on the IRS.gov website. OPA is not at the top of the list for Communications.

If someone is compliant, they generally won't follow the IRS on twitter or electronically.

Everyone who needs information wants to get it tailored to their needs and we must adjust, adapt and deliver. There are fewer newspapers and they are getting smaller and smaller. More taxpayers are going to online media. The IRS is now moving to social media:

- YouTube – 2009
- iTunes – 2009
- Twitter – 2009
- Facebook – 2010
- LinkedIn – 2011
- Phone app – 2011
- Tumblr – 2012
- YouTube
 - [IRS Channel](#)
 - [IRS Multilingual Channel](#)
 - [IRS ASL Channel](#)
- Twitter
 - [@IRSnews](#)
 - [@IRStaxpros](#)
 - [@IRSenEspanol](#)
 - [@YourVoiceatIRS](#)

- [@RecruitmentIRS](#)
- Facebook
 - [IRS Facebook page](#)
 - [Return Preparer Office Facebook page](#)
- Tumblr
 - [IRS Tumblr](#)

Vicki Stevens said if a question or a comment, positive or negative, is left on the Facebook page, it is immediately removed. We do not want to interact with taxpayers through a public venue. However, if it looks like a taxpayer needs help, we will try to reach out to them.

We are actively doing tweets right now and will be using Tumblr soon. We have also been with Intuit for three or four years and are working on partnering with H&R Block.

Chapman showed a portion of "Payment Alternative When You Owe the IRS" video. Another video touched on was "Owe taxes? Understanding IRS Collection Efforts" video. It is an 8 part video and all parts are available on the IRS.gov websites. There are also other videos available on IRS.gov regarding installment agreements.

Success over the long run will be an increase in OPA users. We need to reach taxpayers who could benefit using this system. We want you to help us identify how to reach out to taxpayers to let them know about this.

E-fax of Taxpayer Documents within ACS

Ash Kassim said ACS is looking at cost savings by providing an electronic fax system to reduce paper and handling of paper. The Enterprise System will route the mail or E-fax and only the person receiving the document will know what is inside. The system will use phone numbers and bar code routing. This process has been approved by office of privacy.

The system will be available to all employees, is committed to all users needs, and is fully 508 compliant.

This system was tested last year by seven users in Oakland for ten weeks and had a very high success rate. We now have 100% usage in the Oakland office now. You can use your computer to send a fax or you can send a regular fax and the system will convert it to an electronic form. You are now able to get a Power of Attorney (POA) from a practitioner via E-fax. You can accept business documents to make account adjustments. We also use a toll-free number so there is no extra cost. It only takes approximately 33 seconds to fax per page.

It is totally secure and employees can get faxes 24/7 from taxpayers because they can fax documents at any time. It will also be a huge savings to the IRS; no more copier or fax toners;



less paper; not to mention the customer does not have to spend time faxing documents or going somewhere to fax them. Customers can also get a receipt when they use E-fax.

The E-fax documents will go directly to the employee's outlook folder. Forms can also be signed electronically. However, we do not work with the Form 1040 in ACS.

A taxpayer can sign a Form 2848, *Power of Attorney and Declaration of Representative*, manually and can scan it or can do it online and then send it via E-fax. (However, not all documents are scan-able.) A taxpayer can actually forward information via E-fax while still on the phone with an IRS employee. That can result in an immediate resolution of a case.

This system has been accredited through our cyber security system. An E-fax can be sent to multiple users at one time. Kassim said they have been using this system for about a year now and our customers love it. This means one stop service and could alleviate transferring a taxpayer from one person to another.

You can also program your computer to send an E-fax at a specific time down the road.

We use the numbers provided to us by taxpayers to send faxes and we are very careful that we use the correct number.

All documents received through E-fax are converted to PDF. About 14,000 employees currently have the capability of receiving and sending E-faxes and we are rolling it out to revenue officers and compliance employees.

The E-fax system also helps us with an audit trail. We never have to worry about an empty toner cartridge and a document not printing. We can resolve cases more quickly because we are not waiting for documents to come through the mail. So far we have processed over 2.5 million documents.

Benefits:

Proof, privacy and security, increasing efficiency, easy experience, one stop service, reducing consumables, can resolve taxpayer issue(s) immediately and it is a very easy tool to use.

We are looking for suggestions to help us identify other tools we can use to help taxpayers. We are hoping you will suggest ways to improve our system.

We are looking at adding fax numbers to more notices. We are hoping you can help us identify forms and notices where it would be helpful to add a fax number. We are also looking at using a 2D barcode instead of a social security number. So if a taxpayer sends a document to an incorrect IRS number, the bar code could identify where it really should have gone.

There is no way at this time to identify who the documents should go to if a general E-fax number is provided; that is why individual numbers are used.

Oakland used to use five fax machines in ACS and are now down to one. The capability of this system is huge.



Our goal is to focus on E-fax and its capabilities, but we also want to explore other electronic tools that would benefit the IRS and taxpayers.

Any feedback provided regarding E-fax would be great. Is there a way to improve this system? Do you see other avenues where we could use this system?

We also want to look at some Collection notices to see if we can add a fax number to it to help reduce the taxpayer's burden. We would like this Committee to look at other notices as well.

Kassim set up a demonstration of the E-fax system for committee members.

Subcommittee Members

Increase Use of the Online Payment Agreement Application (OPA)

- Rodger Lees
- Mary Jo Thomson
- Walter Webster, lead
- Theresa Watson

E-fax of Taxpayer Documents Within ACS

- Mark Marshalek
- Eileen Kelly
- Ralph Boyea

Next steps for OPA:

Chapman is going to get requested information and share links

Members will view the videos on IRS.gov

Need to flesh out ideas identified during brainstorming

Next steps for E-Fax:

Subcommittee will meet and come up with a list of additional information needed