



**2015 Meeting Minutes
Taxpayer Communications Project Committee**

- November 5, 2015
- October 1, 2015
- September 3, 2015
- August 20, 2015
- July 2, 2015
- June 4, 2015
- May 7, 2015
- April 2, 2015
- March 5, 2015
- February 5, 2015
- January 15-16, 2015

**Taxpayer Communications Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
November 5, 2015**

Designated Federal Officer

- Jimerson, Susan Seattle, WA Designated Federal Officer

Attendance

- Bell, Jerome Fayetteville, NC Vice Chair
- Bennett, Ralph Anacortes, WA Member
- Boyea, Ralph Keaau, HI Member
- Campbell, Stephanie Farmington, MO Member
- Jones, Gina Delhi, LA Chair
- Kanack, Suze Riverton, WY Member
- Matthews, Jeanne South Park, PA Member
- Reese, Gail Buckeye, AZ Member
- Watson, Theresa Jacksonville, AR Member
- Webster, Walter Las Cruces, NM Member

Members Absent

- Basciano, Dawn Sacramento, CA Member

Staff

- Sheila Andrews, TAP Director
- Debby Awalt, W&I Program Analyst
- Tamikio Bohler, W&I Management and Program Analyst
- Tonjua Menefee, W&I Senior Tax Analyst

- Carolyn Sanders-Walsh, SB/SE Program Owner
- Antoinette (Toni) Ross, TAP Program Analyst
- Annie Gold, TAP Secretary/Administrative Assistant

Roll Call

Annie Gold took roll call, Quorum was met.

Public Input

None

Opening/Welcome

Susan Jimerson welcomed everyone to the meeting and expressed thanks to the full committee for the dedication and hard work everyone has done. The committee has done phenomenal work in getting the referrals completed and to the Joint Committee (JC).

The JC will have their final meeting for 2015 on Wednesday, November 25, 2015. The meeting will begin at 10:00am, PST. It will begin on time as there are a number of referrals that they will be reviewing. The public and TAP members are welcome to sit in on this call. If anyone needs to obtain the call-in information, reach out to Toni Ross or Susan Jimerson and the information will be forwarded to you. Members who are planning to remain with Taxpayer Communications Project for the TAP year 2016, the Face to Face meeting has been set for the second week in January.

- January 13, 2016 – All day meeting for membership training
- January 14, 2016 – All day meeting for Project Committees
- January 15, 2016 – Half day (8:00 – Noon) session with afternoon return travel

Work is being done to finalize the location of where the meeting will be held. A solicitation was sent out to all returning members to choose which committee they prefer to serve on for 2016. Once this information has been compiled and determination on the committee members, the finalization of the Face to Face will be completed. At the conclusion of this meeting, the TAP year will be completed. Returning members should look for emails coming out from the administrative staff that will contact members through emails and or telephone calls to make travel arrangements and reservations for the Face to Face meeting in January 2016.

Committee travel days are:

- Taxpayer Communications – January 13, 14 and 15, 2016 location in Jacksonville, FL location
- Notices and Correspondence – January 11, 12 and 13, 2016 location in Jacksonville, FL location

The new member list will be coming out soon. Members are encouraged to make sure all updates to your contact information are forwarded to Ross so that all information is current in the system. If there are any questions for Jimerson or Ross, please reach out.

Action Item: Toni Ross will send out the contact information to everyone with emails and telephone numbers.

If anyone is doing outreach in the month of December, keep track of it and ensure to report all Outreach activity including hours worked in TAP to Ross. Jimerson and Andrews expressed special thanks to the following members who are retiring at the end of November:

- Stephanie Campbell
- Suze Kanack
- Theresa Watson
- Ralph Boyea
- Walter Webster

Susan Jimerson gave an overview of the Agenda for today's meeting.

Sheila Andrews also thanked the full committee for their work and dedication shown throughout the year. Jimerson thanked the retiring members for staying the course. A recommendation to receive a Presidential Awards has been submitted for each retiring member for their dedication. The awards are being processed and should be ready for issuance by the end of this month.

The elections are going well with a special thank you to Gina Jones for helping with this process. The next big event is to meet the candidates. The calendar invite was sent out so please mark your calendars for Thursday, November 12, 2015, beginning at 4 p.m. to 5 p.m.; EST. Members are encouraged to volunteer to be a Chair or Vice Chairperson for TAP. Otis Simpson sent out an email asking for the following three things from returning members:

- Willingness to be a Mentor – This is critical in TAP. As a mentor you would walk beside the new member to help give them guidance and provide experience.
- Reviewers and Instructors – Volunteer members would review the material for the Face to Face as well as serve as an instructor if needed.
- First, Second, and Third choice for which committee you would like to participate on for the upcoming TAP year.

The Face to Face meeting will be held the week of January 11, 2016. Once all this information has been received travel funds can be finalized and arrangements secured.

- Jimerson will host the Jacksonville location where Taxpayer Communications and Notices and Correspondence will hold their Face to Face meeting.
- Sheila Andrews will be in Albuquerque with Special Projects and Tax Forms and Publications.
- Cedric Jeans will be in Oklahoma City with Toll Free and Taxpayer Assistance Centers.

Chair Report

Gina Jones expressed thanks to the members departing this year. Thanks to Suze Kanack for being Jones' mentor during her first year with TAP. Elections for Project Committee Chair and Vice Chairs will be held at the Face to Face meeting. Members are encouraged, if interested, to participate and volunteer for one of the Chair positions. Members may want to join the JC call scheduled for this month. There will be at least 14

issues reviewed by the JC. This is a reminder to ensure referrals being submitted to the JC are thoroughly reviewed on grammar and punctuation. A special thanks to the full committee for working so hard and being so dedicated throughout the TAP year. Jones expressed her appreciation for being the Chair for this committee. Thanks to Jerome Bell for serving as Vice Chair and for filling in at the JC meeting.

Approval of Minutes

October minutes approved as submitted.

Members of the Public

None

Program Owner Report

Debby Awalt expressed thanks to the committee and for assisting with the Interactive Tax Assistant Tool. There is a new scam taking place targeting students. The scammers are telling students their student aid is taxable and they should pay immediately. Students borrow money and these loans are not taxable.

Another communication issue is some English-only taxpayers are receiving notices in Spanish. This issue is being worked to correct the problem.

Tamikio Bohler thanked all the members and the members retiring for their recommendations, suggestions, and topics for improvements. The W&I approved topics will be submitted by next week.

Carolyn Sanders-Walsh expressed her thanks to the committee and to retiring members for all their efforts and hard work.

Jones added her thanks to the TAP Staff for all the hard work and support. Special thanks go to Jimerson for being the leader for the committee and to the analysts for their support.

Issue Screening Committee

Jerome Bell stated the meeting was cancelled because not enough members attended the call on Wednesday, October 7, 2015. There are no updates at this time.

Subcommittee Reports

Subcommittee A

Gail Reese stated **Issue 32780 – Interactive Taxpayer Assistant (ITA)**, was received by the JC on October 28, 2015. Jones asked about **Issue 31082-Mail Tracking** that should be going to the JC. Jimerson stated the referral is almost ready, IRS Staff is looking for a different Systemic Advocacy (SA) Analyst to review and we hope to get it completed in time for the meeting with the JC. It will be sent on to the JC without the full committee's input if only grammatical work is needed. Jones expressed appreciation to Reese for taking over the subcommittee after Steve Belec resigned from TAP.

Subcommittee B – Issue 32775-433-F/Taxpayer Burden Reduction (TBR)

Ralph Bennett stated the subcommittee had a scheduled meeting for November 2, 2015, but no one from IRS was on the call. Jones stated the committee is waiting on the referral to come back from the SA Analyst. Jimerson stated it will be forwarded to Ross so she can forward over to the JC. Jones thanked the subcommittee for all the work done.

Outreach Report

Bell stated he did not receive the cumulative report that shows who all turned in there reports. He had no updates but reminded the committee all reports are due on the twenty-fifth day of the month. Jones encouraged members to keep doing outreach and reporting the hours.

Office Report

Recognition was shared for Jones and Bell. Jones has been an outstanding Chair with all the behind the scene work she does. Andrews expressed her appreciation for all the communications they have had. Bell has done a great job with the Outreach and filling in for Jones at the Face to Face for the JC. He represented the Committee very well. A job done well Gina Jones and Jerome Bell!

Jimerson shared Andrews' comments and congratulated Jones and Bell for doing a wonderful job. The Screening Committee will have plenty of work for next year. To the IRS Staff: Awalt, Bohler, and Sanders-Walsh a special thanks for being helpful. The partnership and leadership shown by the Program Owners is appreciated. If anyone should have questions, please reach out to Andrews, Ross, or Jimerson.

Closing

Jimerson closed the meeting.

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

**Taxpayer Communications Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
October 1, 2015**

Designated Federal Officer

- Andrews, Sheila Seattle, WA Designated Federal Officer (Acting)

Attendance

- Basciano, Dawn Sacramento, CA Member
- Bell, Jerome Fayetteville, NC Vice Chair
- Bennett, Ralph Anacortes, WA Member
- Boyea, Ralph Keaau, HI Member
- Campbell, Stephanie Farmington, MO Member
- Jones, Gina Delhi, LA Chair
- Matthews, Jeanne South Park, PA Member
- Reese, Gail Buckeye, AZ Member

Members Absent

- Kanack, Suze Riverton, WY Member
- Watson, Theresa Jacksonville, AR Member
- Webster, Walter Las Cruces, NM Member

Staff

- Sheila Andrews, TAP Director
- Debby Awalt, W&I Program Analyst
- Tamikio Bohler, W&I Management and Program Analyst
- Liz Evans, W&I Contact Rep
- Deanna Johnson, TAS Supervisory Associate Advocate
- Cindy Jones, W&I Supervisory Program Analyst
- Tonjua Menefee, W&I Senior Tax Analyst
- Rosemary Rixey, W&I CAS Policy Analyst
- Carolyn Sanders-Walsh, SB/SE Program Owner
- Antoinette (Toni) Ross, TAP Program Analyst
- Theresa Singleton, TAP Program Analyst
- Annie Gold, TAP Secretary/Administrative Assistant

Roll Call

Toni Ross took roll call, Quorum was met.

Public Input

None

Opening/Welcome

Sheila Andrews welcomed everyone to the meeting. She is sitting in for Susan Jimerson. The Committee has this meeting and next month's meeting to get things finalized for the Joint Committee (JC). There will be a solicitation for returning members who are interested in being part of the Face to Face training. Otis Simpson will be sending this information out with a solicitation for any members interested in becoming a Chair or Vice-Chair for next year. There will be some important dates to pay attention to. Andrews shared an overview of the agenda for today call.

Chair Report

Gina Jones stated the JC had their meeting Wednesday, September 30, 2015. There was one referral reviewed, **Issue 32780 – Interactive Tax Assistance (ITA) on www.irs.gov**. The first draft of this referral and not the final referral went to the JC in error. The JC sent the referral back to be reworked. This will make a total of three issues that will go up to the JC next month. Everyone is commended on the 100 percent submission of the Activity Reports for August. Toni Ross added there was a 100 percent submission for September. Thank you to everyone for two months in a row.

Approval of Minutes

September minutes approved with the changes listed as follows:
Subcommittee A and B reference notes to the two issues are reversed under the heading. Ross will make the changes to correct the reversal.

Members of the Public

None

Program Owner Report

Debby Awalt stated work is being done to determine what projects TAP will be requested to work on next year. One of the big issues in the past has been getting people to use the website www.irs.gov. This is one issue the projects' assistance will be needed on again. Internally ways of saving money, reducing the budgets and implementing some of the recommendations from this committee are being looked at. There are other projects being viewed to free up monies. The Internal Revenue Manuals (IRMs) are being updated for the filing season. Training will be starting soon for the hiring to be done.

Carolyn Sanders-Walsh stated some of their staff is no longer with them due to the realignment. They have some challenges ahead but they are working through them. No major delays are expected. Tamikio Bohler stated there were no updates at this time.

Issue Screening Committee

Jerome Bell stated the Screening Committee's meeting will be Wednesday, October 7, 2015. There are no updates for this call.

Subcommittee Reports

Subcommittee A

Jones opened the discussion for changes and or comments:

- **Issue 31082, Mail Tracking**, this issue has gone to Quality Review and is back for discussion with the full committee. Gail Reese recommended approval with no changes mentioned.

Decision: Full Committee Consensus approved to move forward.

Reese stated this concludes what the subcommittee has been working on. The meeting scheduled for Tuesday of next week is cancelled due to not enough time to begin a new referral and complete it by the end of the year. Andrews thanked Reese for all the work done on this issue. Ross will send cancellation notice out to the committee.

Subcommittee B – Issue 32775-433-F/Taxpayer Burden Reduction (TBR)

Ralph Bennett stated the Subcommittee met on Monday, September 28, 2015, and discussed the edits on the form 433-F. The next meeting will be Monday, November 2, 2015. A couple of issues will be discussed at that time. Jones stated the draft on the 433-F came back from Quality Review. Some formatting issues were mentioned but have now been corrected. The goal statement will be change to read:

Provide constructive feedback and offer recommendations for Form 433-F to make it easier to complete and reduce taxpayer burden.

Under proposed solutions, Ralph stated there were two fields called out.

- **Issue 32775 – Form 433-F Collection Statement Information**: discussions were held by the full committee with implementing grammatical and sentence structural changes.

Decision: Full Committee Consensus to elevate issue with changes.

Gina Jones will forward the revised referral to Toni Ross.

Outreach Report

Bell stated everyone's Activity Report had been turned in and thank you to all. He reminded the committee the reports are due on the twenty-fifth day of the month.

Action Items

Jones stated the committee will forward to Toni Ross the two issues that were discussed on today to go to Legal and come back in time to elevate to the JC by their next meeting. Jones reminded members to keep Wednesday, October 28, 2015 open.

Ross confirmed waiting to receive Issues **31082**, **32775**, and **32780** to elevate.



Closing

Sheila Andrews adjourned the meeting.

**Next Call: Thursday, November 5, 2015
3 p.m. ET; 2 p.m. CT; 1 p.m. MT; Noon PT**

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



**Taxpayer Communications Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
September 3, 2015**

Designated Federal Officer

- Jimerson, Susan Seattle, WA Designated Federal Officer

Attendance

- Bell, Jerome Fayetteville, NC Vice Chair
- Bennett, Ralph Anacortes, WA Member
- Boyea, Ralph Keaau, HI Member
- Jones, Gina Delhi, LA Chair
- Kanack, Suze Riverton, WY Member
- Reese, Gail Buckeye, AZ Member
- Watson, Theresa Jacksonville, AR Member
- Campbell, Stephanie Farmington, MO Member

Members Absent

- Basciano, Dawn Sacramento, CA Member
- Matthews, Jeanne South Park, PA Member
- Webster, Walter Las Cruces, NM Member

Staff

- Sheila Andrews, TAP Director
- Debby Awalt, W&I Program Analyst
- Tamikio Bohler, W&I Management and Program Analyst
- Liz Evans, W&I Contact Rep
- Deanna Johnson, TAS Supervisory Associate Advocate
- Cindy Jones, W&I Supervisory Program Analyst
- Tonjua Menefee, W&I Senior Tax Analyst
- Rosemary Rixey, W&I CAS Policy Analyst
- Carolyn Sanders-Walsh, SB/SE Program Owner
- Antoinette Ross, TAP Program Analyst
- Theresa Singleton, TAP Program Analyst
- Annie Gold, TAP Secretary/Administrative Assistant

Roll Call

Annie Gold took roll call, Quorum was met.

Public Input

None

Opening/Welcome

Susan Jimerson welcomed everyone to the meeting. There are two more full Committee meetings remaining until the end of the TAP year. If referrals are currently being worked, now is the time to tie up any loose ends and get the referrals through the Committee's Quality control process.

- The referrals need to be approved at the full Committee's October meeting
- It then will go to the Systemic Analyst for review
- Next to the Attorney Advisory for review
- Final step to the Joint Committee (JC) for their approval to forward to the IRS

The Joint Committee (JC) has two more meetings. One is at the end of October and the other one is at the end of November. Getting the referrals to the JC by October would allow them to approve and forward to on to the IRS. Waiting until November may cause delay if the JC sends the referral back for revision.

Sheila Andrews stated the Committee was very well represented at the JC's Face to Face meeting. The Chairs are strategically planning for the TAP members' Face to Face annual meeting. Due to the budget not being any better than it was last year, a set time for the meeting will be the second week in January. This information would be helpful and will be shared with the first and second year members as well. Thank you to all members who participated on the Affordable Care Act Calculator. The creator of the Calculator mentioned his appreciation and he has been able to tweak things as a result of members' feedback. Information will be coming out next week on elections of the TAP Chair and Vice Chair. There will be a separate meeting to share more information on being a Chair or Vice Chair.

Susan gave an overview of the Agenda.

Chair Report

Gina Jones welcomed everyone to the call. She encouraged everyone to adhere to getting all referrals completed in order to get through the review process. She expressed a special thank you to Susan for encouraging the Committee to finalize the referrals. The process takes time to get through with the end of the TAP year approaching. Congratulations and thank you to all TCC members. There was 100 percent participation in getting the Activity Reports in for the month of August. The JC is looking for a final product to sign and send to the Internal Revenue Service. Referrals need to be precise and have as much information included on what the Committee is trying to get across.

Approval of Minutes

Minutes approved as submitted with correction for August.

Members of the Public

N/A

Program Owner Report

Tamikio Bohler, W&I Management and Program Analyst stated there were no updates to report.

Issue Screening Committee

Jerome Bell stated the Committee had a long discussion on the issue submitted by Andrew VanSingel.

- **Issue 31299** – The Sub Committee recommended leaving this issue in the Parking lot and assign to a Committee to work in 2016. Susan added Toni will provide some information from the Internal Revenue Manual to the Sub Committee. The mail issue where the Taxpayers respond to Notices.

Jerome stated the Sub Committee is finding duplicate issues and need to screen further to provide updates during next month's meeting.

Subcommittee Reports

Subcommittee A – Schedule C/Interactive Tax law Assistant (ITA)

Gail Reese provided update to the following issues:

- **Issue 32776** – Improve Schedule C Compliance, referral went to the JC with a couple of changes. It was forwarded on for approval.
- **Issue 32780 – Interactive Tax Assistant (ITA) on www.irs.gov** – review is ready to go to the JC in September. It will be presented by Gina and Gail.
- **Issue 31082 – Mail Tracking**, there has been discussion on mail issues. It is not just certified mail but all mail coming into service centers. A list of questions was sent to Debra Awalt and they are waiting for a response. Gina added the correct date for the JC's next call is Wednesday, September 30, 2015, at 10:00am PST.

Subcommittee B – 433-F/Taxpayer Burden Reduction (TBR)

Ralph Bennett stated the Subcommittee met on August 31, 2015 and discussed the form 433F.

- **Issue 32775 – Form 433 Collection Statement Information**, has been completed and sent back to Toni and Gina. The other issues on names and phone numbers require follow up notices. The Submitter has been located and follow up will be done. The draft referral was only sent to Gina and Toni. Gina asked for comments for clarification. If the name of the form is changed would it make it easier to complete or less of a Taxpayer burden. The full committee discussed the issue. The goal statement was brought up as a possible change. Gina suggested she will take proposed solution #3 and do a draft to move forward with the issue. She will draft the referral and send it to Sub Committee B. It will be ready for discussion during next month's full Committee meeting.

- **Issue 31289 – 32(K) Ban on EITC**, the Sub Committee had a discussion with a SME, Andrew Marshall, about an Internal Revenue Manual available to look at.

Outreach Report

Jerome stated 100% was reach in completing TCC's August Activity reports.

Jerome attended the Tax Forum in Atlanta where he worked the TAP booth. He and Kathy Jenks Harm from Vermont found it difficult for everyone to take the time to complete the forms. There were four completed forms received by the second day. There should be additional ones coming in by mail. It was an awesome experience and everyone is encouraged to participate in the Forums if the opportunity presents itself. Gina also encouraged members to participate. She attended a Tax Forum in New Orleans and found the majority was looking for Taxpayer Advocate Service instead of TAP.

Action Items

Gina stated

- Sub Committee A is looking for response from Program Owner (Issue 31082)
- Sub Committee B Gina will provide a draft for the next month's discussion

Everyone was reminded to watch their emails as information will be coming for upcoming events.

Closing

Susan Jimerson adjourned the meeting.

**Next Call: Thursday, October 1, 2015
3 p.m. ET; 2 p.m. CT; 1 p.m. MT; Noon PT**

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



**Taxpayer Communications Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
August 20, 2015**

Designated Federal Officer

- Jimerson, Susan Seattle, WA Designated Federal Officer

Attendance

- Basciano, Dawn Sacramento, CA Member
- Bell, Jerome Fayetteville, NC Vice Chair
- Bennett, Ralph Anacortes, WA Member
- Campbell, Stephanie Farmington, MO Member
- Jones, Gina Delhi, LA Chair
- Kanack, Suze Riverton, WY Member
- Matthews, Jeanne South Park, PA Member
- Watson, Theresa Jacksonville, AR Member
- Webster, Walter Las Cruces, NM Vice-chair

Members Absent

- Boyea, Ralph Keaau, HI Member
- Reese, Gail Buckeye, AZ Member

Staff

- Sheila Andrews, TAP Director
- Debby Awalt, W&I Program Analyst
- Tamikio Bohler, W&I Management and Program Analyst
- Liz Evans, W&I Contact Rep
- Deanna Johnson, TAS Supervisory Associate Advocate
- Cindy Jones, W&I Supervisory Program Analyst
- Tonjua Menefee, W&I Senior Tax Analyst
- Rosemary Rixey, W&I CAS Policy Analyst
- Carolyn Sanders-Walsh, SB/SE Program Owner
- Antoinette Ross, TAP Program Analyst
- Theresa Singleton, TAP Program Analyst
- Annie Gold, TAP Secretary/Administrative Assistant

Roll Call

Annie Gold took roll call, quorum met

Public in attendance

None

Opening/Welcome

Susan Jimerson welcomed everyone to the meeting. The TAP interview phase has been completed. Work on the recommendation phase is now being done to determine who will be the new panel members and alternates to bring on board for the 2016 TAP year. The Joint Committee (JC) face-to-face meeting was completed during the first week in August. It was a very productive meeting. A lot of information was shared and things put into place for the upcoming TAP year. Work was done on the Chair and Vice Chair elections that will be coming up later in the year. The Chairs will be making their recommendations for project proposals for 2016. They will be reaching out to members from their committee for feedback to prepare for the upcoming year. TAP year ends in November. As members work on referrals, keep in mind, it has to be approved by the full committee, reviewed by Systemic Advocacy Analyst and the Attorney Advisor before the referrals can go to the JC for approval and on to the IRS. These timelines are to be kept in mind. The entire process may take up to 20 days once the referral has been approved to get on the agenda for the next JC meeting.

Sheila Andrews added the JC's Face to Face meeting was very good with the Chairs, Vice Chairs and Internal Communications. The Face to Face meeting for the members was discussed. The budget is not going to be any better for next year. It was decided to strategically plan due to the budget. The second full week in January was proposed to the JC and they accepted it. Everyone was encouraged to mark their calendars for this timeframe. A reminder today is the last day to review the Affordable Care Act Calculator and share any feedback. Sheila expressed thank you to everyone who participated and have already given their feedback. Susan gave a brief overview of the Agenda.

Chair Report

Gina Jones welcomed everyone to the call and expressed thank you to Jerome Bell who represented the committee on her behalf at the JC meeting. Thank you to Gail Reese for covering the meeting for Subcommittee A. It is very important for every member to be flexible and be able to step in as a substitute when needed. Issue 26834 is up for the full committee's vote. This issue was submitted on last year as a referral. IRS informed the committee it had been resolved. After looking at the referral, the subcommittee is not satisfied that the issue has been resolved prior to elevation. The reconsideration request to go back to IRS should have been sent to everyone to review prior to this call. There are two options available for Taxpayers when filing their tax returns: standard or itemized deductions. The two should be linked as a bullet point under the main tab of credit and deductions. Discussion was held and a vote to elevate back to the IRS for reconsideration.

Decision: Consensus – elevate back to IRS for reconsideration and additional comments.

Approval of Minutes

Minutes approved as submitted for July 2015 meeting

Public comment

None

Program Owner Report

Cindy Jones from Wage and Investments and Deanna Johnson with Taxpayer Advocacy Service was asked for comments but did not have any.

Issue Screening Committee

Jerome Bell stated during the JC meeting all of the issues were pulled up that the committees were currently working on:

- **Issue 28823** – OIC Unit Letters that require Taxpayer Response. The complaint was the Taxpayer should receive a letter from the OIC informing the Taxpayers. The letter should be sent by certified mail. Subcommittee did not believe this request was economically to place such a burden on IRS. Recommendation is to drop this issue.
Decision: Consensus – DROP
- **Issue 29770** – Refund Processing Delays. The Subcommittee did not believe this was an accurate complaint, if a refund is held by IRS the Taxpayer should be notified by Web. This is already in place. If the Taxpayer would go to “Where is My Refund”, it will tell them what is going on with the refund and a telephone number for more information. A letter is also sent to the taxpayer. Recommendation is to drop this issue.
Decision: Consensus – DROP
- **Issue 30817** – Having a way to track F1045 by way of the Internet. The request was to have a website implemented to check the status of the F1045. The Subcommittee thought this was a good idea but needed further information. Recommendation to move to the parking lot until more information is obtained with possible discussion with a Subject Matter Expert (SME) to help clarify information on how to proceed.
Decision: Consensus to move to Parking Lot for additional information
- **Issue 31289 – Exams Not Following Taxpayer Bill of Rights** – This issue is currently being worked by Subcommittee B. The recommendation is to move to the parking lot until determination is made on whether or not to keep it, work it into a referral or drop.
Decision: Consensus – Currently being review by Subcommittee B
- **Issue 31299** – This issue was submitted by Andrew VanSingel. He followed up with an email to discuss at the next full committee meeting. Recommended placing in the parking lot for future work.
Decision: Consensus – move to Parking lot for future review

- **Issue 31987 – Online Schedule A Estimator Tool** – This issue was brought to the Subcommittee by Gina who stated the issue came from an Outreach she attended. The submitter requested a tool be created where a person could go online and find out what was allowed to be deducted and come up with a calculation to complete an Itemized or standard deduction. After receiving additional information from Gina the recommendation is to drop this issue due to duplication of an issue already sent up for referral.

Decision: Consensus – Drop

Subcommittee Reports

Subcommittee A – Schedule C/Interactive Tax law Assistant (ITA)

Gina stated Gail Reese has taken on the lead of this Subcommittee after the resignation of Steven Belec. Gail provided some minutes to discuss.

- **Issue 32776** was elevated with changes. Jerome will forward the notes to the committee. This issue will be elevated with the corrections. The corrected referral will be shared with Toni Ross and Susan Jimerson.
- **Issue 32780** has any feedback from IRS. Susan added this is a formal process of giving feedback. She will make sure it is placed on the agenda for the JC's next meeting.
- **Issue 31082** came from a submitter on information coming by certified mail getting lost. This is a postal certification. The Subcommittee requested additional information and will discuss at the next Subcommittee's meeting.

Subcommittee B – 433-F/Taxpayer Burden Reduction (TBR)

Ralph Bennett stated the Subcommittee has three issues being worked on and one referral. The Subcommittee met on this past week, Monday. Two of the issues needed more information and clarification from the submitter. After making attempts to get more information, no response has been received from the submitters.

- Issue 29056 a comment trying to reach a special agent listed on Notices.
- Issue 31418 a complaint on being impossible to reach collection Agents.

Gina added if the issue is systemic no additional information is needed. She agreed the issue should remain with the subcommittee. Suggestion was made to place in the Parking lot for the next TAP year work.

- Issue 31289 there will be a SME joining the Subcommittee's next meeting for discussion.
- Issue 32775 Gina made a suggestion to have the topic statement inserted in the project statement and spell out the acronyms. The Subcommittee was advised to add the background/analysis and the benefits and barriers.



Outreach Report

Jerome reminded the committee to report any hours worked. Hours reading material, conducting outreach, any activities conducted relative to TAP should be reported.

Completing the reports accurately showing any time spend whether reading emails from TAP or discussions with Taxpayers should be reported.

Office Report

Antoinette (Toni) Ross is the official Analyst taking over behind Janice Spinks.

Closing

Jimerson adjourned the meeting.

**Next Call: Thursday, September 3, 2015
3 p.m. ET; 2 p.m. CT; 1 p.m. MT; Noon PT**

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

**Taxpayer Communications Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
July 2, 2015**

Designated Federal Officer

- Jimerson, Susan Seattle, WA Designated Federal Officer

Attendance

- Bell, Jerome Fayetteville, NC Vice Chair
- Bennett, Ralph Anacortes, WA Member
- Boyea, Ralph Keaau, HI Member
- Campbell, Stephanie Farmington, MO Member
- Jones, Gina Delhi, LA Chair
- Kanack, Suze Riverton, WY Member
- Reese, Gail Buckeye, AZ Member
- Watson, Theresa Jacksonville, AR Member
- Webster, Walter Las Cruces, NM Vice-chair

Members Absent

- Basciano, Dawn Sacramento, CA Member
- Matthews, Jeanne South Park, PA Member

Staff

- Sheila Andrews, TAP Director
- Debby Awalt, W&I Program Analyst
- Tamikio Bohler, W&I Management and Program Analyst
- Liz Evans, W&I Contact Rep
- Deanna Johnson, TAS Supervisory Associate Advocate
- Cindy Jones, W&I Supervisory Program Analyst
- Tonjua Menefee, W&I Senior Tax Analyst
- Rosemary Rixey, W&I CAS Policy Analyst
- Carolyn Sanders-Walsh, SB/SE Program Owner
- Janice Spinks, TAP Analyst
- Annie Gold, TAP Secretary/Administrative Assistant
- Teresa Cook, TAP Analyst

Roll Call

Annie Gold took roll call, quorum met.

Public Input

None

Opening/Welcome

Susan Jimerson welcomed everyone to the meeting. Interviews are complete. The next phase in the process is making selections, putting the packages together to forward to the director for approval and finally on to Treasury. The Joint Committee face-to-face meeting is coming up in August. They will be looking at many of the projects going on within TAP and making decisions on what projects to work in 2016.

Sheila Andrews expressed thanks to the committee for all of the hard work.

Chair Report

- Gina Jones stated Steve Belec has resigned due to personal conflicts.
- As the Vice Chair, Jerome will be filling in at the Joint Committee face-to-face meeting.
- Susan added in Steve Belec's absence a new lead for Sub Committee A will need to be established. Gail Reese volunteered to take the lead for Sub Committee A.
- The next TCC full committee meeting is scheduled for August 6, 2015. However, due to the Chair and Vice-chair not being available, the meeting is now August 20, 2015. Susan will make sure the Federal Register is updated accordingly.
- Gina informed the committee the Joint Committee rejected a couple of the referrals and sent them back to the committee for rework due to wording and phrasing issues.
- In April 2015, the IRS replied to Issue 26834, Itemized Deductions, that it was resolved prior to elevation. Stephanie Campbell worked on the issue with Gina; they both agreed that the issue had not been resolved. A rebuttal/reconsideration has been prepared which the committee will review during the August meeting.

Members of the Public

N/A

Approval of Minutes

Minutes approved as submitted for June 2015 meeting

Program Owner Report

Tamikio Bohler indicated the request for reconsideration of the referral goes to the office of Online Services. Janice will send the document out to the committee as a pre-read. Tamikio shared the contact is David Perish and Vicky Price is his back up.

Subcommittee Reports

Subcommittee A – Schedule C/Interactive Tax law Assistant (ITA)

Gina stated one referral has gone to internal Quality Review and Systemic Advocacy. The last level is to go to the Joint Committee. There is one for the Schedule C Compliance and one on the Interactive Tax Law Assistant that is in Quality Review. Both of these are active and the Subcommittee is waiting on responses.

Subcommittee B – 433-F/Taxpayer Burden Reduction (TBR)

Ralph Bennett stated the Subcommittee met, June 29, 2015. Stephanie attended the meeting and noted they discussed the Form 433-F referral. They also looked into the possibility of combining the Forms A, B and F. They will be corresponding via email and discuss again at the next meeting. Stephanie emailed the submitter of Issue 29046; no response received to date. The telephone number shared by the submitter is incomplete. Ralph noted Issue 31418 and 31289 are now assigned to the subcommittee; they will review them at the next meeting.

Issue Screening Committee

Jerome Bell expressed thank you to Gail Reese for all her work in screening and consolidating the issues. The Screening Committee presented the following issues to the full committee for consensus to drop.

- **Issue 21006 –Toll-Free Number – Defense Switched Network (DSN) –** Individual wanted a DSN number. The committee determined there is a standardize procedure in place. The liaison would supply a phone number to individuals after initial contact with IRS. Recommend drop.
Decision: Consensus – Drop
- **Issue 24478 – TAC – international Discrimination – No IRS in Canada –** Individual felt he was not getting assistance needed. The committee determined IRS has addressed this issue. Recommend drop.
Decision: Consensus – Drop
- **Issue 25990 – Slow Process Acquiring CAF Number –** After reviewing instructions for F2448 to obtain a power of attorney for a client, the committee determined the document could be faxed or called in. Recommend drop.
Decision: Consensus – Drop
- **Issue 26830, Return Processing ID Thief –** Submitter had an issue/suggestion regarding the use of PIN numbers to prevent ID Theft. The committee determined the IRS has a way to resolve the issue of ID Theft. Recommend drop.
Decision: Consensus – Drop
- **Issue 27789 – Disclosure Procedures –** The committee determined the IRS would deal with this issue as internal. The submitter made aware of disclosure on tax return. Recommend Drop.
Decision: Consensus – Drop
- **Issue 28823 – OIC Unit Letters That Require a Taxpayer Response –** Submitter believes all IRS mail should be sent certified. Committee believes this is an unrealistic request. Recommend drop. After further discussion by the full committee, they agreed to place the issue in the parking lot for further research and review.
Decision: Consensus to move to Parking Lot for more information
- **Issue 31289 – Exams Not Following Taxpayer Bill of Rights –** Retired IRS employee feels IRS employees in exam are not abiding by the Bill of Rights. The committee recommended assignment to Sub Committee B as part of their Taxpayer Burden Reduction efforts.

Decision: Consensus to assign to Sub Committee B.

Outreach Report

Jerome stated he did not receive the June report in order to know who submitted reports in a timely manner. Reports are due by the twenty-fifth of the month; send reports to the TAP email address.

Office Report

Janice Spinks summarized actions from today's meeting. Susan expressed thank you to everyone again for all the work done. She noted that Janice's detail ends as of August 7, 2015. She will be leaving TAP to return to her permanent position. There will be a new Analyst detailed to TAP and assigned to TCC. Thank you very much Janice!

Closing

Jimerson adjourned the meeting.

**Next Call: Thursday, August 20, 2015
3 p.m. ET; 2 p.m. CT; 1 p.m. MT; Noon PT**

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



**Taxpayer Communications Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
June 4, 2015**

Designated Federal Officer

- Jimerson, Susan Seattle, WA Designated Federal Officer

Attendance

- Basciano, Dawn Sacramento, CA Member
- Bell, Jerome Fayetteville, NC Vice Chair
- Bennett, Ralph Anacortes, WA Member
- Boyea, Ralph Keaau, HI Member
- Campbell, Stephanie Farmington, MO Member
- Jones, Gina Delhi, LA Chair
- Kanack, Suze Riverton, WY Member
- Matthews, Jeanne South Park, PA Member
- Reese, Gail Buckeye, AZ Member
- Watson, Theresa Jacksonville, AR Member
- Webster, Walter Las Cruces, NM Vice-chair

Members Absent

- Belec, Steven Boston, MA Member

Staff

- Sheila Andrews, TAP Director
- Janice Spinks, TAP Analyst
- Annie Gold, TAP Secretary/Administrative Assistant
- Debby Awalt, W&I Program Analyst
- Carolyn Sanders-Walsh, SB/SE Program Owner
- Tonjua Menefee, W&I Senior Tax Analyst
- Cindy Jones, W&I Supervisory Program Analyst
- Teresa Cook, TAP Analyst
- Deanna Johnson, TAS Supervisory Associate Advocate
- Tamikio Bohler, W&I Management and Program Analyst
- Liz Evans, W&I Contact Rep
- Rosemary Rixey, W&I, CAS Policy Analyst

Roll Call

Annie Gold took roll call, quorum was met.

Public Input

None

Opening/Welcome

Susan Jimerson welcomed everyone to the meeting. The TAP new member and alternate interviews are under way. Jimerson thanked all TAP members who have already participated in the interview process.

The TAP year ends November 2015. Members are encouraged to solidify their issues and begin writing up referrals for submission to the IRS. The processes for getting referrals reviewed/approved are:

1. Committee internal quality review,
2. Systemic Advocacy Analyst and Attorney Advisor review,
3. Joint Committee (JC) for final approval and,
4. Elevation to the IRS.

The JC will have their last meeting at the end of November.

Chair Report

Gina Jones stated she did not attend the last JC meeting due to attending an outreach event for TAP in New Orleans. Jones thanked vice chair Jerome Bell for sitting in on her behalf during the meeting and for providing the committee report.

Jimerson noted there were two issues the JC reviewed and sent back to the committee for minor rewriting.

Members of the Public

N/A

Approval of Minutes

Minutes approved with correction for the month of May

- Dawn Basciano attended.

Program Owner Report

- Carolyn Sanders-Walsh stated she is waiting for rescheduling of the subcommittee calls to ensure Subject Matter Experts (SME)s are available to participate. A SME will be present to address the Taxpayer Burden Reduction issue at the June 29, 2015, meeting. Any questions on the 433-F, Burden Reduction or Schedule C will be forwarded to the SMEs in advance so they will be prepared. Steve Ingram, Area Manager from Stakeholders Liaison will be available to speak to the committee during their meeting.
- Janice Spinks will send the email to Subcommittee A to reschedule the meeting for one day next week.

Subcommittee Reports

Subcommittee A – Schedule C/Interactive Tax law Assistant (ITA)

Jones stated an eye-catching brochure was completed for the Schedule C compliance initiative. A draft of the referral was sent to the full committee and the Program Owner for initial review. The committee is waiting for feedback on the referral. Send all comments to Spinks.

Subcommittee B – 433-F/Taxpayer Burden Reduction (TBR)

Ralph Bennett stated the subcommittee's call was rescheduled. A week before it was cancelled a response was received for the questions submitted on 433-F. Bennett will send out write ups for two new issues assigned to the subcommittee prior to the rescheduling of the meeting.

Action Item: Spinks will send a calendar invite for June 10, 2015 at 11 am, PST

Issue Screening Committee

Jerome Bell stated the committee's meeting will be rescheduled. Updates will be done at the next meeting.

Action Item: Spinks will forward to the committee any issues as pre-reads prior to the next full committee call.

Outreach Report

Bell emphasized the importance of getting the Outreach Activity reports completed. Everyone is encouraged to get his or her reports completed and submitted in a timely manner. Members are reminded that part of the TAP agreement calls for a certain number of volunteer hours during the TAP year.

Reminder: Send all Activity reports to Kudiratu Usman and Teresa Cook.

Office Report

Jimerson pointed out the attendance on the call is to be commended. Sheila Andrews expressed her appreciation for all the hard work everyone is doing and for volunteering to help with the interviews.

Closing

Jimerson adjourned the meeting.

**Next Call: Thursday, August 6, 2015
3 p.m. ET; 2 p.m. CT; 1 p.m. MT; Noon PT**

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



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**Taxpayer Communications Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
May 7, 2015**

Designated Federal Officer

- Jimerson, Susan Seattle, WA Designated Federal Officer

Attendance

- Basciano, Dawn Sacramento, CA Member
- Bell, Jerome Fayetteville, NC Vice Chair
- Bennett, Ralph Anacortes, WA Member
- Boyea, Ralph Keaau, HI Member
- Campbell, Stephanie Farmington, MO Member
- Jones, Gina Delhi, LA Chair
- Matthews, Jeanne South Park, PA Member
- Reese, Gail Buckeye, AZ Member
- Watson, Theresa Jacksonville, AR Member
- Webster, Walter Las Cruces, NM Vice-chair

Members Absent

- Belec, Steven Boston, MA Member
- Kanack, Suze Riverton, WY Member

Staff

- Sheila Andrews, TAP Director
- Janice Spinks, TAP Analyst
- Annie Gold, TAP Secretary/Administrative Assistant
- Debby Awalt, W&I Program Analyst
- Carolyn Sanders-Walsh, W&I Program Owner
- Tonjua Menefee, W&I Senior Tax Analyst
- Cindy Jones, W&I Supervisory Program Analyst
- Teresa Cook, TAP Analyst
- Deanna Johnson, TAS Supervisory Associate Advocate
- Tamikio Bohler, W&I Management and Program Analyst
- Liz Evans, W&I Contact Rep
- Rosemary Rixey, W&I, CAS Policy Analyst

Roll Call

Annie Gold took roll call, quorum was met.

Public Input

None

Opening/Welcome

Susan Jimerson welcomed everyone to the meeting.

Chair Report

Gina Jones welcomed everyone on the call. The Joint Committee (JC) met and the recruitment period is over. The decision on who to interview has started. Work has begun on the JC's next face-to-face meeting, which is most likely to be held in August. In June, the planning for this committee's training materials face-to-face will begin. If anyone is interested in helping with this process, send Jones an email message. There will be several different sections of the training prepared. At least one or two committee members will serve as instructors. The newsletter will be returning with a section for the chair report. This will be a brief update shared by each committee included. If there are any updates to be included in the Newsletter, subcommittee leads should get this information to Jones. Now that it is the month of May, the committee's focus should be on the write-up of the referrals coming from the current issues.

IRS Responses

- 26834, No Choice for Itemized Deductions on the Website

Action item: Subcommittee will submit explanation of where the committee was going with the referral and their need for clarification on the decision received from the service.

Members of the Public

None

Approval of Minutes

April's minutes approved as submitted with correction:

- Under Issue Screening Committee, issue 31418 is assigned to Subcommittee B to work not Subcommittee A.

Program Owner Report

- Debby Awalt informed the committee effective after April 15, 2015, taxpayers will no longer be given answers to tax law question over the toll free line. Interactive tax assistant tools are still available on www.irs.gov where taxpayers are being referred.
- Carolyn Sanders-Walsh stated Subject Matter Experts (SME)S are being secured for the subcommittees. Specialist are being sent to answer questions on the 433F issues, working on licensing and licensing agents for State and for burden reduction; the SME will address the direction they are going.

Subcommittee Reports

Subcommittee A – Schedule C/Interactive Tax law Assistant (ITA)

Gina Jones provided the report in Belec's absence. Jones stated the subcommittee is working on a flyer or brochure to send to individuals willing to be in compliance. The

brochure is completed. The subcommittee is currently working on a section to show agencies, businesses and licensing bureaus where the information would be available. Program owner will work with subcommittee on where to place this information.

ITA – Information was sent up Awalt. Adjustments were made and will be included in the referral, which the subcommittee is preparing to write.

Subcommittee B – 433 F/Taxpayer Burden Reduction (TBR)

Ralph Bennett provided the following updates:

- March 21, 2015 – background information on taxpayer burden reduction was sent to Jones.
- March 30, 2015 – the subcommittee call was held.
- April discussion was on Form 433F and was held with Lynn Greer and Sanders-Walsh.
- May 4, 2015 – moved Form 433F from background discussions to brainstorming.
- Questions were forwarded to SME for answers. Some answers were received.
- On reducing taxpayer burden, the subcommittee is waiting to reach consensus on suggestions.

Issue Screening Committee

Jerome Bell provided updates on issues:

- **29056, Notice Improvement – Wrong numbers on Notice** – Committee's recommendation is to work this issue and transfer to Subcommittee B.
Decision: Consensus reached to work and assign to Subcommittee B
- **32198, Free Filing should be Free for all Taxpayers** – IRS provides taxpayers free filing options with income less than \$60,000.00. Committee's recommendation is to drop this issue.
Decision: DROP
- **28923, Centralization of Offices Created Communication Voids** – Committee's recommendation is to drop this issue because of the budget.
Decision: DROP
- **31082, IRS Lost Documents** – Information is often lost within the IRS, even though documents were sent via certified mail with return receipts. Committee's recommendation is to work this issue once subcommittee is available.
Decision: Consensus to place in Parking Lot until Subcommittee A is finished with current task to work
- **31300, Getting E-Services Transcripts for ID Theft Accounts** – Committee's recommendation is to transfer this issue to the Special Project Committee currently working ID Theft.
Decision: Consensus reached to send issue to Special Projects Committee

Office Report

Jimerson stated as of April 20, 2015, the new member application process has closed. Over 1100 total applications were received. Automating the process by using USA Jobs website has been very successful. The list of qualified applicants has been received and a solicitation for member participation in the interview process will be going out via email soon. As the TAP year is half over, Jimerson encouraged the committee to focus on drafting referrals to address the recommendations to elevate to the Internal Revenue Service.

The Stakeholders Liaison Webinar on ID Theft was available to all members who wanted to attend. Those who attended should send comments and feedback to Janice Spinks, TAP Analyst.

Special thank you goes out to all members for all the work done.

Outreach Report

Jerome Bell encouraged members to get their Activity Reports in by the twenty-fifth of the month.

Reminder: All Activity reports are to be sent to Kudiratu Usman and Teresa Cook.

Closing

Jimerson adjourned the meeting.

**Next Call: Thursday, June 4, 2015
3 p.m. ET; 2 p.m. CT; 1 p.m. MT; Noon PT**

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



**Taxpayer Communications Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
April 2, 2015**

Designated Federal Officer

- Jimerson, Susan Seattle, WA Designated Federal Officer

Attendance

- Basciano, Dawn Sacramento, CA Member
- Bell, Jerome Fayetteville, NC Vice Chair
- Bennett, Ralph Anacortes, WA Member
- Boyea, Ralph Keaau, HI Member
- Campbell, Stephanie Farmington, MO Member
- Jones, Gina Delhi, LA Chair
- Kanack, Suze Riverton, WY Member
- Matthews, Jeanne South Park, PA Member
- Reese, Gail Buckeye, AZ Member
- Watson, Theresa Jacksonville, AR Member
- Webster, Walter Las Cruces, NM Vice-chair

Members Absent

- Belec, Steven Boston, MA Member

Staff

- Sheila Andrews, TAP Director
- Janice Spinks, TAP Analyst
- Annie Gold, TAP Secretary/Administrative Assistant
- Tonjua Menefee, SBSE, Program Owner
- Deanna Johnson, TAS, Supervisory Associate Advocate
- Tamikio Bohler, W&I Management and Program Analyst
- Liz Evans, W&I Contact Rep

Roll Call

Annie Gold took roll call, quorum met.

Public Input

None

Opening/Welcome

Susan Jimerson opened the meeting and welcomed everyone.

Chair Report

Gina Jones welcomed everyone and confirmed receipt of the agenda.

Jones shared the following Joint Committee (JC) updates:

- All committees are working at full force. Some are still in the research mode. A couple of committees have put forth referrals.
- The Notices and Correspondence committee has a referral coming up next month on the CP2000.
- Tax Forms and Publications (TFP) committee issued three referrals to the Joint Committee. Only one was approved as submitted. One had a few minor changes in wording and approved with the changes made. The other was on Form 1139 and sent back to the committee for reworking. The issue coming from TFP committee is a good issue. It just has some minor word changes.
- Jones cautioned everyone to read the information on proper writing techniques for referrals. You are to be thorough and accurate. Be precise and to the point. Jimerson stressed the importance of making sure to look at the TAP Style Guide when writing the referrals. Janice Spinks sent a copy of the Style Guide to each member of the committee.
- The JC approved the new Activity Report submitted by the committee. Everyone should have received it and used it for activity in March. The report is due by the twenty-fifth of the month.
- Jones stated IRS responded to Issue 29731, *The Fresh Start Initiative*. A copy of the response was included as pre-read. Jones gave a brief overview of the IRS responses; what was accepted/not accepted.
- The TCC also received a response on Issue 29732, *The Simplified Home Office Deduction*. Kudos goes out to members that worked this issue last year. Jones gave a brief overview of the IRS responses; what was accepted/not accepted.

Approval of Minutes

Minutes approved as submitted with noted changes

- January 15 – 16, 2015 – Jimerson noted Ralph Boyea's name is misspelled.
- February 5, 2015 – On issue 29056 the second line will remain as is due to not being able to approve.
- March 5, 2015 – Jimerson noted Ralph Boyea's name is misspelled. The attendance notes him as being both absent and present. Remove absent and show him as present.

Program Owner Report

Tamikio Bohler noted W&I had no updates.

Tonjua Menefee reported for Carolyn Sanders-Walsh. She noted SBSE has no updates to report. She thanked everyone for the work done.

Issue Screening Committee

Jerome Bell provided updates on issues:

- **31299, 32(K) Ban on Earned income Tax Credit (EITC)** – Issue submitted by Andrew VanSingel. The committee's plan is to ask VanSingel to attend the May

screening committee meeting. The recommendation is to table the issue until they receive additional information from the submitter.

Decision: Consensus to defer until they receive further information.

- **29277, Amended Returns – Long Processing Cycle** – After reviewing this issue, the committee’s recommendation is to drop this issue. The committee sees this as an isolated incident.
Decision: Consensus to drop.
- **28923, Centralization of Offices Created Communication Void** – This issue was discussed during the face-to-face meeting and was touched on during the last committee call. The previous recommendation was to send to the Taxpayer Assistance Center Improvements (TAC) committee, which the committee agrees with.
Decision: Consensus to transfer to the TAC committee.
- **31418, Collection Agents Impossible to Reach/No Response** – This is a new issue. After discussing the issue, the recommendation is the IRS needs to find alternative methods to addressing long wait times taxpayers are experiencing when calling the 800 numbers. Committee recommends the subcommittee working Taxpayer Burden Reduction work the issue. Gail Reese volunteered to work on consolidating all the like issues into one and fine-tune the issue to address for recommendation. Jones agreed to the consolidation.
Decision: Consensus to work this issue and assign to Subcommittee A.
- **32449, Deadline for Online Filing** – This is a new issue. Taxpayer stated the cutoff time to pay taxes on the IRS website is by 3 p.m. Taxpayer feels IRS should change to midnight to correspond with other websites that allow payments until midnight. The committee concurs; however, they want to speak with someone who handles IRS web services. The recommendation is to keep this issue and have questions answered as to how many payment methods are available. Jimerson stressed to Bell that they should get all of their questions to Spinks so she can forward them on to Liz prior to the meeting.
Decision: Consensus to keep issue and obtain more information
- **27789, Disclosure Procedures** – Issue status is active. The taxpayer was made aware of disclosure of information on a tax-exempt organization’s tax return (the donor list). Committee recommends assignment to the TAC committee for further work/follow up. Andrews provided background on the issue, noting it resulted from an outreach event. She noted there is an individual designated to speak to the committees. A question rose whether to have the instructor speak with the full committee or the entire panel? Andrews said it was originally requested as an all TAP call. Andrews added having the person involved would be beneficial. Andrews and Jimerson agreed having a presentation to the committee first would be a good idea. They will talk about the disclosure laws, how it applies and the questions mentioned. Jimerson will contact the committee to set up the meeting.



Decision: Committee to have educational meeting on issue

Action Item: The remaining issues will be discussed at the next committee meeting.

Jones and Bell reminded everyone to submit the outreach reports.

Closing

Jimerson adjourned the meeting.

**Next Call: Thursday, May 7, 2015
3 p.m. ET; 2 p.m. CT; 1 p.m. MT; Noon PT**

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

**Taxpayer Communications Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
March 5, 2015**

Designated Federal Officer

- Jimerson, Susan Seattle, WA Designated Federal Officer

Attendance

- Belec, Steven Boston, MA Member
- Bell, Jerome Fayetteville, NC Vice Chair
- Bennett, Ralph Anacortes, WA Member
- Jones, Gina Delhi, LA Chair
- Matthews, Jeanne South Park, PA Member
- Watson, Theresa Jacksonville, AR Member
- Webster, Walter Las Cruces, NM Vice-chair

Members Absent

- Basciano, Dawn Sacramento, CA Member
- Boyer, Ralph Keauau, HI Member
- Campbell, Stephanie Farmington, MO Member
- Kanack, Suze Riverton, WY Member
- Reese, Gail Buckeye, AZ Member

Staff

- Sheila Andrews, TAP Director
- Janice Spinks, TAP Analyst
- Annie Gold, TAP Secretary/Administrative Assistant
- Carolyn Sanders-Walsh, Program Owner
- Ken Marek, SB/SE Revenue Officer Supervisor
- Rosalind Rush, SB/SE Collections Revenue Officer

Roll Call

Annie Gold took roll call

Public Input

None

Opening/Welcome

Susan Jimerson welcomed everyone to the meeting and reviewed the agenda. Due to untimely filing of the Federal Register Notice, she indicated the meeting would be administrative only. Because of this, the committee will not be allowed to make any decisions or take any votes; only discussing issues to bring back to the next full committee meeting. The Federal Register Notice is required to be posted fifteen days

prior to the meeting to allow members of the public to be notified of the meeting. This is to allow them, (if they should choose) to join the call and participate in the discussion.

Due to the inclement weather, holidays, staff changes and the office closures, TAP staff was prevented from posting the notice for the March meeting timely. This will not be an issue going forward. The April notice has already gone forward for timely posting

Susan welcomed Janice Spinks who is replacing Lisa Billups as the Program Analyst for this committee. She is currently on a 60-day detail.

Susan announced the TAP is entering the Recruitment period, which begins March 9, 2015, and runs through April 19, 2015. We are recruiting for approximately 25 new members and 31 alternates. This will be our first year using www.usajobs.gov for candidates to apply as volunteers for the Taxpayer Advocacy Panel. We typically receive around 400 applications, which are reviewed by the staff. With ranking and determining which applicants will be considered for interviews, it usually takes up to a week to go through all applications. Using www.usajobs.gov will significantly streamline the process. We are very excited about this new process and encourage everyone to tell friends, family and anyone who may be interested in volunteering for the TAP about the recruitment period.

Gina Jones asked if there was anything on paper regarding the recruitment process to hand out to individuals. Susan said there are some talking points available that she will forward to the members.

During the February Joint Committee (JC) meeting, a new Activity Outreach Report was approved. The report is to capture member hours and activities relative to the TAP and any outreach events conducted. There is a centralized person who the reports will go to rather than the Analyst. Once the information is consolidated, it is then forwarded to the chair and vice-chair of each project committee. This will assist them in getting a better understanding of all of the activities going on with the Taxpayer Advocacy Panel. The report will be coming out later this month for use. Since the recruitment period begins March 9, 2015, and runs through April 19, 2015, it should be reported for the month of April on the activity report.

Chair Report

Gina Jones encouraged the members who are practitioners to focus on their tax obligations and not feel bad about doing so. She advised them to make every attempt to get any outreach activities done as their schedule permits.

The JC has not received any new referrals. Because today is an administrative meeting, the committee would not be allowed to vote on anything. A request was made that 20 minutes be allowed on the next agenda for the Screening Committee portion of the meeting. The issues and recommendations have to come before the full committee in order to be elevated to the Joint Committee. Bell will have ample time to go through his report and make recommendations to the committee. The only referral/request currently

outstanding is for the reconsideration of the American Tax Credit. They are resubmitting some cost effective figures, which were submitted February 20, 2015. The committee is waiting to hear back from the IRS on this.

There are a couple of issues pending IRS feedback from last year, which need follow up.

Subcommittee A – Steven Belec, Lead

Belec stated Subcommittee A is continuing to work on two issues; Interactive Tax Law Assistant (ITLA), compliance review and the project to improve Schedule C filers. The committee is currently in the information gathering stage. They were able to meet with the Subject Matter Experts (SMEs) on both issues who provided a lot of clarification to the group and sent material for the subcommittee to review. For the ITLA, the team is doing content and usability analysis. Gail Reese has expressed enthusiasm and offered to take some leadership on this issue. She has done a lot of usability and content analysis on the current Tax Law Assistance and identified some issues early on. The group became aware of some other interactive assistance on IRS.gov such as Tax Trails.

The subcommittee received a detailed debriefing on the compliance for Schedule C filers including the stakeholders they worked with. They looked at what has been done around the calendar year 2012 campaign to prevent duplicating what was already done. Both projects involve a lot of research and understanding of the issues.

Due to the extended time placed on the ITLA issue during the last meeting, there was not a lot of time given to the Schedule C filers. Susan noted it is important that the committee allow time for both issues to be discussed and suggested the subcommittee consider an additional meeting or possibly split the issues into separate subcommittees. This can be an agenda item at the next meeting on how to ensure ample time is devoted to both issues. Gina added she was in agreement with this suggestion. She believes it is a good idea to maybe begin with Schedule C filers at the next meeting.

Subcommittee B – Ralph Bennett, Lead

Bennett stated the subcommittee met Monday of the prior week. The subcommittee spent the prior month on the broad issue of Taxpayer Burden Reduction, which led to couple of reactions. There was no progress on the recommendation they want to get to the analyst. In preparing for this week's meeting, the subcommittee arranged for two SME on the Form 433F. They were joined by Ken Marek and Rosalind Rush; they were very helpful. The conversation was probing the SMEs for issues they encounter with the 433F. The subcommittee wanted to know more about where the form fits in the collection process, what communications accompany it and their impression on how sophisticated the taxpayers are to tackle the Form 433F.

The SMEs shared the IRS feels the 433F, although smaller than some of the collection statements, is still too long and complicated. It has been revised twice within the last few years. The targeted audience has been expanded and this has put a hindrance on

the efforts to simplify it at the same time. It is still four pages that require information on assets, liabilities and monthly expenses. The 433F is not required for the streamlined installment agreement but is required for the more complicated ones (i.e. not collectible, and OIC). The subcommittee discussed several areas to possibly explore, such as the level of sophistication and possibly trying to create an online payment agreement tool to guide and support taxpayers.

Carolyn Sanders-Walsh attended the meeting to share information with the subcommittee; she provided a number of examples with high impact. Some examples dealing with the 1099Bs was a high bar for the subcommittee to take on.

After the call, Bennett noted he spoke with Spinks and she will conduct additional research related to Taxpayer Burden Reduction. Bennett said he does maintain notes on these two issues and would like to circulate with Chairs or to members. Spinks said there are subcommittee folders on www.tapspace.org to house the meeting minutes and any other documents the committees want posted there. Gina agreed posting any additional information would be helpful.

Outreach – Jerome Bell, Lead

Bell stated it would be great for panel members to partner with local tax offices near them. This would afford great opportunities for networking and letting as many people as possible know about the TAP, its mission and what the program is about. The first meeting was scheduled and everyone is encouraged to get his or her reports in by the fifth of the month.

Janice Spinks will order any brochures or handout materials members will need to hand out during outreach activities.

Gina stressed the practitioners are a good source of information for the outreach. As soon as business cards come, members can place them in a greeting message and mail them out. The VITA centers are also a good place for outreach. Members are encouraged to visit local LTA offices. It is a good to let them know who you are and get to know them. It is important to reach out to as many people as possible. Susan added the LTA should be reaching out to you but you do not wait for the LTAs to contact you. If you have not heard from them, reach out to Spinks or Jimerson and they will contact them and make sure the introduction takes place.

Issue Screening Committee – Jerome Bell, Lead

Bell noted the meeting scheduled for March 4, 2015, was cancelled. There will be another screening committee meeting on April 1, 2015. The subcommittee will be ready to give their recommendation on April 2, 2015, along with the first Outreach Report.

Gina stressed the TCC will hold their monthly meetings on the first Thursday of every month and the subcommittees will run into the second week. April 2, 2015, will be the full committee's next meeting date. Subcommittee A will meet on Tuesday April 7, 2015. A good portion of the correspondence will be done via email.

Spinks reminded everyone to respond to the email on business cards so they can be ordered. Your information needs to be verified before the order can be completed. Susan stated Ralph Bennett had a visit with the LTA (Bill Mezger) in Seattle. Bennett said he and Bill developed a very good rapport. He was interested in immigration and outreach with immigrants. One of the two VITA sites ran by Bennett are located in the middle of farm labor in Washington which is a large Mexican population. There were many other issues explored. The LTA has a mandate to talk to Bennett once a quarter. They are already planning activities for collaboration. Gina added if every state has a TAP representative the LTAs need to know about them. Susan added it is part of the LTAs mandate to have an outreach plan with their TAP members. If anyone has not heard from or are having difficulty reaching their LTA please let Jimerson or Spinks know. They will intervene to ensure it happens.

The Internal Communications Committee is being revamped. The committee typically works on the Annual Report, TAP Newsletter, and a number of communications issues that are internal to Taxpayer Advocacy Panel. This year TAP is looking to take the TAP Annual Report out of the Internal Committee and make it an AD HOC Committee. The AD HOC Committee will focus on getting the report out a little sooner than in the past. There will be a solicitation going out to Panel Members to participate (targeting those who have skillsets in proofreading, writing, etc.) in preparing the Annual Report. The Internal Communications Committee will be meeting soon to discuss their focus and the direction they will be going. If you have an interest or skillsets in doing this type of work, watch for the solicitation.

Closing

Jimerson adjourned the meeting.

**Next Call: Thursday, April 2, 2015
3 p.m. ET; 2 p.m. CT; 1 p.m. MT; Noon PT**

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

**Taxpayer Communications Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
February 5, 2015**

Designated Federal Officer

- Susan Jimerson, Designated Federal Officer

Attendance

- Dawn Basciano
- Steven Belec
- Jerome Bell
- Ralph Bennett
- Ralph Boyea
- Gina Jones
- Suze Kanack
- Jeanne Matthews
- Gail Reese
- Theresa Watson
- Walter Webster

Members Absent

- Stephanie Campbell

Staff

- Sheila Andrews, TAP Director
- Lisa Billups, TAP Analyst
- Annie Gold, TAP Secretary
- Debby Awalt, W&I Customer Service
- Carolyn Sanders-Walsh, SBSE

Members of the Public

None

Opening/Welcome

Susan Jimerson welcomed everyone to the meeting.

Roll Call

Annie Gold took roll call.

DFO Report

Jimerson stated the call today will be an administrative meeting. The notification required by FACA was not submitted by the 15 day timeframe which is the FACA's guideline for posting prior to meetings. Due to the face to face meeting there was not enough time to get the notification out. The committee is not able

to make any decisions but you may have discussions and bring back to the next committee meeting with quorum present. The office report shows we have accomplished a lot. The staff is working to get all of our documents posted onto www.tapspace.org. This will make it easier for access. The TAP has lost our Database Analyst to retirement. Currently another analyst is working to take his place. She will be taking over the duties working to get www.tapspace.org websites updated for your convenience. If you have any problems getting on www.tapspace.org, contact Lisa Billups, Susan Jimerson or Kim Vinci. One of us will be glad to assist you.

The staff is working on centralizing outreach reporting. Training was held in January on Outreach/Activity reports. There will be a centralized person for the members to send their reports to. The consolidated report will be shared with the committee's representative to show how the committee is doing. A new Activity Report will be on place on the Agenda for the Joint Committee (JC) to approve.

Change in TAP Staff. Lisa Billups is leaving the Taxpayer Communications Committee (TCC) to dedicate her time to working the 2015 Recruitment Program and taking on the duties as lead analyst for the Joint Committee. Billups' replacement will be on board by the end of the month. Lisa Billups will work with the new TCC analyst to make sure there is a smooth transition.

Billups expressed her appreciation to the committee and said she has enjoyed working with the committee. Sheila Andrews shared that Janice Spinks, former TAP analyst, is coming back on detail to the Taxpayer Advocacy Panel. Spinks worked with the TAP for several years prior to leaving for a promotion. She already has a strong working knowledge of TAP and its' objectives. Jimerson assured the committee it will continue to be as strong as ever.

Chair Report

Gina Jones said there was only one person missing during the Face to Face meeting. The meeting was a good one. The Committee was able to get a lot of administrative items completed. Jones expressed her appreciation for the committee electing her as Chair and Jerome Bell as Vice-Chair. All of the Committee conference calls are scheduled for during the first week of each month. Subcommittee A and B, the Screening Committee calls are all within the first week. If the meetings dates should fall into the second week, it will be ok.

The JC meetings are scheduled for the last Wednesday of each month. Members are encouraged to continue to get the Outreach Reports submitted. Remember, when you are in travel status for TAP the time should be reported from when you first leave your residence until you return back from the face to face meeting. At a minimum, everyone that attended the face to face meeting should have reported and recorded time for the face to face meeting. The committee is doing a good job and encouraged to continue doing good work.

Program Owner Report

Debby Awalt stated they are still working on issues provided by TCC from last year. They are providing information on www.irs.gov to what will be answered on the Toll Free line and what the taxpayer will be able to get in the walk-in offices. This information is being put out on www.irs.gov so that taxpayers will see it and know what type of assistance will be provided. Carolyn Sanders-Walsh added a briefing document was provided to them. A copy of this briefing is available if the committee wants it. Billups will contact Sanders-Walsh after the meeting to discuss.

Subcommittee Reports

Jones stated Subcommittee A will be working two issues: Interactive Tax Law Assistant (ITA) – several members have not been able to do as much research on the online application as they would have wanted. Gail Reese has done research and gotten some conflicting answers under the deduction section. The team was asked to forward the findings to the subject matter experts. The subcommittee will continue to review the ITA. A request was made for a listing of the frequently asked questions on the website so that the subcommittee can see the most popular topics.

On the Schedule-C Initiative, focus was centered on the flyer or brochure that would catch the attention of taxpayers and would list benefits of reporting business activities. Discussions were held as to methods to educate self-employed taxpayers of their responsibilities, etc. and ways to get to that targeted audience. A briefing that was shared by Sanders-Walsh helped to focus the teams' efforts. Small Business/Self Employed (SBSE) is looking for more non-traditional partnership possibilities to reach this population. A request was made by the team for a list of the non-traditional partnerships already identified. The team intends to focus on what SBSE has already done with the Schedule-C initiative and the entrepreneur Initiative, and has requested additional information. Sanders-Walsh requested the committee to the website and to look at what is already there.

The goal is to get self-employed individuals to recognize that they are self-employed and educate them so they can become compliant. Benefits to reporting a business activity includes access to social security benefits. Sanders-Walsh stated she has a lengthy list of the major partners. There are about 80 major partners on the list she will give to the subcommittee. Sanders-Walsh asked if someone could take a look at a snapshot she has in order to determine what exactly they will need, this will keep her from sending information the team may not need. There is a Communication Stakeholder and Outreach Calendar (CSOC) available and Sanders-Walsh will forward a copy to the subcommittee.

Subcommittee B

Ralph Bennett stated Subcommittee B had a conference call on Monday. It was short call. There were two issues the subcommittee covered.

- Taxpayer Burden Reduction was improving the taxpayer experience.

A set of five questions were forwarded to the Subject Matter Expert (SME) with an invitation to join in the call. The SME was unable to join the call but provided a response with the requested information.

The team can focus on pre-filing or post filing, this is a broad issue. The IRS advisory committee has also been requested to address this issue. The team is interested in hearing more of the Internal Revenue Service Advisory Council (IRSAC) perspective.

The team asked TAP staff to do a database search, to look through open issues in parking lot related to taxpayer reduction in addition to contacting other areas of TAP to obtain thoughts on ways to focus the team's efforts.

- Form 433-F provides taxpayer information for Installment Agreements. There are a number of forms with variations of income/asset/ liabilities and monthly expenses. They will follow up by telephone or walk into the Taxpayer Assistant Center. The form 433A is more widely used. The committee is also looking at the form itself. A discussion was held as to whether this issue should be assigned to Tax Forms and Publications committee. The team will address whether the amount of information required on the form is overly burdensome and required during various stages of the collection process.

Discussion was held on whether or not to keep this issue in the committee. Jimerson stated it will be kept in committee. Debby Awalt asked if this was given as an issue. Sanders-Walsh asked the committee to send questions to her and she will pass them on for answers. Sanders-Walsh is one of the experts for the Taxpayer Advocacy Panel. Her impression is improving the taxpayers experience once you have already filed and received correspondence from the Internal Revenue Service.

Outreach

Bell encouraged everyone to get in their Outreach Reports. The reports are due by the fifth of each month. As a practitioner, passing out brochures to clients is one way of getting information out about TAP and what we do. This is a great idea to get the word out. If you need brochures let Jimerson know and the staff will provide them for you. Ralph Boyea made a suggestion to try contacting the local colleges.

New Issue Screening Report

Jerome Bell stated the New Issues Screening had their meeting and it went extremely well.

- 29740 – Clients receiving offset and not knowing why, IRS does a great job in informing taxpayer of why and responding to the taxpayer.
Recommendation: Issue dropped.
- 29056 – Not being able to reach anyone after receiving an audit letter.
Recommendation: Issue dropped.
- 31987 – Developing online Schedule A tool for itemized deductions that reacts similar to the “Small Business Health Care Estimator” or the “Premium Tax Credit Estimator.”
Recommendation: Issue placed in Parking Lot for further discussion.
- **28923** – Removal of local agents across the nation. Issue is above TAP’s ability to work.
Recommendation: Issue dropped.
- **26869** – IRS responding electronically, taxpayer received formal IRS letterheads and this is an isolated incident.
Recommendation: Issue dropped.
- **31299** – IRS is imposing \$32,000 ban on Earned Income Tax Credit for two years from taxpayers without following internal guidelines in the Internal Revenue Manual (IRM).
Recommendation: Issue placed in Parking Lot until being reviewed by Andrew VanSingel.
- **31300** – Practitioner receiving difficulties and need to speak with person directly.
Recommendation: Issue tabled until next month’s meeting.

Billups expressed gratitude and encouraged members to continue being motivated and thanked Awalt and Sanders-Walsh for their assistance. The new analyst coming aboard will have Billups’ assistance.

A question was asked about the status of the referral for the American Opportunity Credit. Billups said it was sent to Ellen at the beginning of January and will follow up, Jimerson indicated it goes back to the IRS. The rebuttal was prepared. Billups will make sure it is routed back to IRS for reconsideration.

Closing

Meeting is officially closed.

**Next Call: Thursday, March 5, 2015
3 p.m. ET; 2 p.m. CT; 1 p.m. MT; Noon PT**

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

**Taxpayer Communications Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
January 15-16, 2015**

Designated Federal Officer

- Jimerson, Susan Seattle, WA Designated Federal Officer

Committee Members Present

- Basciano, Dawn Sacramento, CA Member
- Belec, Steven Boston, MA Member
- Bell, Jerome Fayetteville, NC Vice Chair
- Bennett, Ralph Anacortes, WA Member
- Boyer, Ralph Keaau, HI Member
- Jones, Gina Delhi, LA Chair
- Kanack, Suze Riverton, WY Member
- Matthews, Jeanne South Park, PA Member
- Reese, Gail Buckeye, AZ Member
- Webster, Walter Las Cruces, NM Vice-chair

Committee Members Absent

- Watson, Theresa Jacksonville, AR Member (Present 1/16/15)
- Campbell, Stephanie Farmington, MO Member

TAP Staff

- Billups, Lisa Dallas, TX Senior Program Analyst
- Singleton, Theresa Washington, DC Program Analyst

IRS Staff

- Carolyn Sanders-Walsh Tampa, FL Senior Tax Analyst
- Ken Marek Lanham, MD Revenue Officer Supervisor
- Joe Guillen Albuquerque, NM Senior Tax Analyst

Public

None

Welcome/Open Meeting

Susan Jimerson opened the meeting and welcomed everyone. Agenda for meeting reviewed.

Roll Call

Quorum met.

Election Process

Jimerson explained the election process for chair and vice-chair person. Once nominated, candidates will give a brief speech as to why they would be the best person to hold the position.

Responsibilities:

Chair – Spokesperson for the committee

- Point of Contact
- Discuss with DFO, Program Owners, and TAP Staff
- Participates in the Joint Committee who is the governing body for TAP
- Explain the process
- Point of Contact for setting work assignments
- Approve minutes

Vice-Chair – Outreach Coordinator for the committee

- Get ideas
- Develop activities and enhance skills
- Participate in Outreach activities
- Steps in when Chair is not available and act in that role

Action Item:

Gina Jones was elected TCC Chair

Jerome Bell was elected TCC Vice-Chair

Staff Roles and Responsibilities

TAP staff reviewed the roles and responsibilities covering the following topics:

- Methods of Communication
- Ground Rules and Telephone Etiquette
- Minutes / Minutes Approval
- Establish Meeting Quorum
- Meeting Survey Assessments
- Consensus

Meeting turned over to the chair, Gina Jones to preside over the meeting.

Approve November Minutes

The minutes for November 2014 were approved by consensus as submitted.

Program Owner Report

Small Business/Self Employed (SBSE) and Wage and Investments (W &I) program owners and subject Matter Experts (SMEs) provided presentations virtually for TAP focus groups as follows:

SB/SE – Improve filing and payment compliance with Schedule C filers

Presenter – Carolyn Sanders-Walsh, Senior Tax Analyst, Communications and Stakeholder Outreach, Operations Support – SME for Schedule C Outreach

Suggest diverse yet focused marketing strategies for Schedule C filers who are generally unaffiliated with our traditional partners and stakeholders. Determine how IRS should reach these small business owners. What methods and/or steps should IRS employ to encourage voluntary compliance?

SB/SE – Form 433-F, Collection Information Statement

Presenter – Ken Marek, Revenue Officer, Collection Policy, Headquarters Collection, Collection Operations – SME for Form 433-F (Joe Guillen, Revenue Officer, Senior Tax Analyst, On-site SME)

Evaluate the Form 433-F from the taxpayer and practitioner perspective and make suggestions that will make the form easier to complete and reduce taxpayer burden

SB/SE - Reducing Taxpayer Burden by improving the Taxpayer Experience Presenter - Laurie Tuzynski, Senior Advisor to the Director, Operations Support

Suggest an approach for our employees to use in considering the taxpayer experience, as it relates to the burden of complying with their federal tax obligations. This approach would be applicable to both existing and new implementation of policies and procedures. This may include:

- General considerations.
- Currently available and accessible tools or reference materials.
- Documentation requirements (e.g., template, check sheet).

The panel may also identify areas that are particularly ripe for changes and suggest ways to improve the taxpayer experience in order to reduce burden. Areas of consideration may be simplifying forms and/or processes to cut down on unnecessary paperwork or processing steps for both the taxpayer and IRS. Any suggestions should include recommendations on what changes can be made without compromising overall compliance or compliance programs. For example, recommendations may be made for areas where IRS can:

- Use Electronic communication (e.g., “fillable” forms).
- Reduce the frequency of information collection.
- Maximize the re-use of data already collected.

W&I- Interactive Tax Assistant (IRS.gov)

Presenter – Kathleen Glauber, Tax Analyst, Customer Accounts Services

Review Interactive Tax law Assistant (ITA) functionality and provide recommendations for improvement/feedback to improve the taxpayer experience.

The committee discussed dividing into two subcommittee and dates for meeting as follows:

Subcommittee teams, meeting dates, and project focus established:

Subcommittee A (ITA/ Schedule C initiative)

Members: Steve Belec (lead), Gail Reese, Gina Jones, Suze Kanack, Ralph Boyea, Theresa Watson

Meeting times: First Tuesday of month, 3 p.m. ET

Subcommittee B (Form 433-F, Reducing taxpayer burden by improving the taxpayer experience)

Members: Ralph Bennett (lead), Jerome Bell, Dawn Basciano, Jeanne Matthews, Walter Webster, Stephanie Campbell

Meeting times: First Monday of Month 2 p.m. ET

The committee designated the following individuals to represent the committee for:

Issue Screening committee:

Ralph Boyea, Theresa Watson, Jerome Bell, Dawn Basciano

Meeting times: First Wednesday, 3 p.m. ET

Internal Communications TCC representative:

Suze Kanack, Jeanne Matthews, Ralph Bennett

Quality Review:

Gail Reese, Jeanne Matthews

Outreach:

Jerome Bell

Notes from Subcommittee A and B break-out discussions:

Subcommittee A discussed follow up questions for the ITA and Schedule C SME as well as plan of action to review the ITA program.

Subcommittee B discussed plan of action for reviewing Form 433-F and TBR. Several questions were answered by SME Joe Guillen. Members were to review the TBR information to determine an area of focus for the committee.

January 16, 2015

Reports given by both Subcommittee A and B

Issue and Current Status of Issues report

Members reviewed the status of the issues worked last TAP year and referrals elevated to Internal Revenue Service. The TAP Staff will follow up on overdue responses.

Closing

Susan Jimerson reminded members to forward your requested travel information to Annie for prompt travel voucher processing and reimbursement.

Jimerson closed the meeting.

**Next Meeting: Thursday, February 4, 2015
3 p.m. ET; 2 p.m. CT; 1 p.m. MT; Noon PT**

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