



**2017 Meeting Minutes
Taxpayer Communications Project Committee**

- Nov. 2, 2017
 - Oct. 5, 2017
 - Sept. 7, 2017
 - Aug. 3, 2017
 - July 6, 2017
 - June 1, 2017
 - May 4, 2017
 - March 23-24, 2017
-

**Taxpayer Communications Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Nov. 2, 2017**

Designated Federal Officer

- Gilbert Martinez Acting Designated Federal Officer

Attendance

- | | | |
|---------------------------------|--------------------|------------|
| • Ellen Bemis | Presque Isle, ME | Member |
| • Scott Hall | Georgetown, KY | Vice Chair |
| • Joseph Martin | Jefferson City, MO | Member |
| • Kimberly Mason | Chicago, IL | Member |
| • Gail Reese | Buckeye, AZ | Member |
| • Dan Smolnik | Hamden, CT | Member |
| • Ruth Tsujimura | Honolulu, HI | Member |
| • Richard “Kent”
Christensen | Boise, ID | TAP Chair |

Absent

- | | | |
|----------------------|-----------------|--------|
| • Millicent Kasal | Lindstrom, MN | Member |
| • Sheila Olsen | Lawton, OK | Chair |
| • James “Jim” Sowell | Panama City, FL | Member |

Staff

- Susan Jimerson, Acting TAP Director
- Antoinette Ross, Program Analyst



- Lisa Billups, Program Analyst
- Matthew O'Sullivan, Program Analyst
- Tamikio Bohler, W&I
- Debra Awalt, W&I
- Rosemary Rixey, W&I
- Annie Gold, TAP Administrative Assistant

Roll Call

Quorum was met.

Opening/Welcome – Acting DFO, Gilbert Martinez

Martinez opened and welcomed members to the meeting. Susan Jimerson is the Acting TAP Director. She will be acting director in November and if needed, Cedric Jeans will be acting TAP director in December. Martinez will be acting for the next two weeks as DFO and Lisa Billups will be acting DFO the last two weeks in November. The TAP newsletter was regarding reporting time correctly. There is an article on the Presidential Service Awards and a link was included in the newsletter. Members were encouraged to make sure an accurate account of their hours were being submitted. If there are any questions, contact Ross. A brief overview of the agenda was shared.

National Office Update – Susan Jimerson

Jimerson noted that this is TCC's last meeting for the TAP year. Any referrals must be approved during this call to move forward. The past eight months have gone by quickly and Jimerson expressed appreciation to each member for their dedication and hard work. The committee put together some well thought out referrals. According to the consolidated activity report through the month of September, the committee has contributed over 2,000 hours of outreach with the TAP program and the members are commended for their efforts. The TAP elections have been completed and Holly Hoffman was selected as the TAP chair 2018 and Scott Hall was selected as TAP vice chair 2018. Congratulations to Hall on his selection. Hall thanked everyone for their support and the congratulations. He will send a response to thank everyone. He pointed out there were good candidates running for the positions. He and Hoffman are excited and looking forward to TAP year 2018.

There are two Joint Committee (JC) meetings remaining. The next meeting is scheduled for Friday, Nov. 17, 2018, and the last one will be held on Wednesday, Nov. 29, 2018. Gail Reese was congratulated on the completion of her TAP term. Reese was recognized for her many accomplishment and time spent on various projects: Input on the Interactive Tax Assistant (a lot of time and effort spent), the mail tracking referral, the Exam AUR policy, Scheduler C Filer Referral, and the IRS2Go issue. She was also a part of the Annual Report Committee. Reese was also appreciated for over 600 hours she contributed to the TAP program for the



past three years. Reese thanked everyone and confirmed the next meeting for the Subcommittee 2 was cancelled. Ross confirmed there will not be a Subcommittee 2 call. Debra Awalt thanked Reese. Richard Christensen congratulated Hall on his selection as TAP Vice Chair. He also congratulated Reese for the great job she has done. Christiansen shared that this will be his last year with TAP. A special thanks to all members and continue the good work.

Chair Report – Scott Hall (Acting)

Hall stated with his selection as TAP vice chair he will remain on TCC for his final year with TAP. He stated he really enjoyed the first two years and will remain for the final year. The Newsletter that Martinez sent out was a good-bad news thing. The bad news being there was no TCC article included even though an article was submitted. The good news is recognition for outreach coverage will be shared during this meeting. Members were reminded of an email that was sent out informing the TAP of documents regarding the latest Tax Refund scam being sent to taxpayers posing as TAP members. The emails appear to be from TAP. They are phishing scams to obtain personal and financial information. Members were advised to forward any phishing scam emails to www.phishing@irs.gov. Hall expressed his gratitude and appreciation to Reese on her retirement.

Approval of Minutes

Oct. 5, 2017 minutes approved.

Public Input

Jeanne Matthews, former TAP member who retired last year, stated TCC was the committee she participated on for her entire term. She joined the call to see how things are going and to congratulate Hall on his selection as TAP vice chair and Reese on her retirement. Hall expressed gratitude to Matthews for joining the call.

Program Owners

Debra Awalt stated responses are being worked on for the recommendations submitted. She added her gratitude and appreciation to the committee. Awalt is looking forward to working with the members next year. Tamikio Bohler expressed appreciation to TAP Staff and Members for all the work in helping Wage and Investment (W&I) provide service to taxpayers. She also congratulated Hall and Reese.

IRS Response

Ross shared the IRS response on Issue 34108 – *AUR Exam Policy*. Copies of the response was sent to the chairs. She read the response in its entirety. A copy of the response will be sent to each member. The committee recommendation was to accept IRS responses to the three issues within the AUR Exam Policy.



Decision: Full committee consensus to accept IRS response.

Subcommittee Updates

Subcommittee 1: Dan Smolnik stated the referral for Issue 35819 was resubmitted to the JC with suggested revisions. Christiansen confirmed that the issue has been forwarded to the IRS. The Subcommittee 2 did have a second issue but are still waiting on a response from the SME regarding if www.irs.gov can post animation on the site. Issue 35819, *Refundable Credit Communication*: TAP is waiting for a response from IRS.

Subcommittee 2: Ross stated the referral for Issue 36467, *IRS General Communications*: IRS2Go was completed by Reese on Oct. 6, 2017, sent to QR on Oct. 16, 2017, and then sent to Systemic Advocacy and the Attorney Advisors on Oct. 26, 2017. The referral was reviewed and sent back to the subcommittee as ready to go. Ross shared the referral with the full committee for review and approval. The committee's recommendation is to move forward.

Decision: Full committee consensus to move referral to the Joint Committee.

Screening Committee Update

Reese reported out on the issues:

- **Issue 36502:** Is there a way dealing with a volunteer how to coordinate with IRS. Recommendation by Screening Committee to place in **Parking Lot**.
- **Issue 36528:** Not a TAP Issue – **Close**
- **Issue 36547:** Not a TAP Issue – **Close**
- **Issue 36551:** Not a TAP Issue – **Close**
- **Issue 36556:** Not a TAP Issue – **Close**
- **Issue 36557:** Not a TAP Issue – **Close**
- **Issue 36128:** Ross to contact submitter – leave in **Parking Lot**
- **Issue 36664:** Ross to contact submitter, EFIN issue not a TAP issue – **Close**
- **Issue 36518:** Ross to contact submitter, SS or Tax Department NY – **Close**
- **Issue 36422:** Ross to contact submitter refer to Problem Resolution Day – **Close**
- **Issue 34733:** Ross will re-enter in SAMS – leave in **Parking Lot**, no written guidance for individuals
- **Issue 36395:** No response from submitter – **Close**

Decision: Full committee consensus accept the Screening Committee's recommendation

Outreach Activity Report:



Hall reminded the members to try and get all the Activity Reports in and early submission is acceptable. The committee was recognized in the TAP Newsletter. The project committees that had the most number of hours reported were featured. Congratulations to Taxpayer Communications, Notices and Correspondence, and Taxpayer Assistance Centers for a job well done. Recognition was given to members from the September Report: Ruth Tsujimura 18.5 hours with two events attended; Jim Sowell 23 hours and nine events with 37 people; Gail Reese one event and one hour with 22 people. Outreach can be a lot of different things such as tweeting, emails, etc. Hall encouraged members to continue doing outreach. Hall had an event at the Problem Solving Day in Louisville, Kentucky. It was a great event. He encouraged members to look at the information posted.

Action Items: Ross

- Post TAP Oct. 5, 2017 meeting minutes, send to TAP Secretary to post on www.TAPSpace.org and upload to FACA database.
- Send summary of Issue 34108 to members
- Cancel Subcommittee 2 meeting and send notification to members
- Update SAMS with Screening issues

Jimerson thanked all members returning and retiring.

Closing

Martinez closed the meeting.



Jimerson stated that an election informational call is scheduled for Oct. 17, 2017, noon to 1 p.m. ET. Richard “Kent” Christensen will host the call and explain what it is to be the TAP Chair and share his experiences. The call will give members a better idea of what to expect being the chair and/or vice chair. Swayzer is the lead analyst hosting the election and she will send the invites to members to attend the various events. Members can self-nominate themselves or someone else. Nominations are due Oct. 19, 2017.

There are two more Joint Committee meetings remaining until the end of the TAP year. There are many referrals that are coming before the Joint Committee and an additional meeting is being considered for mid-November. The last meeting is scheduled for Nov. 29, 2017. The September TAP Newsletter was issued Oct. 4, 2017, to the members and alternates and members were encouraged to look at the Newsletter if they have not done so already.

Chair Report – Gail Reese

Reese stated Sheila Olsen left a note of encouragement to all members who wanted to nominate themselves or another member to participate in the election for the TAP chair and vice chair position. The actual committee chairs and vice chairs will be done during the face-to-face meetings. Members were also encouraged to visit tax blogs to get information when doing outreach activities. The end of the TAP year is approaching, screening subcommittee suggested the meeting be rescheduled due to the timeframe to get the referrals completed. Jimerson added the last meeting is Nov. 2, 2017. A possible change of the full committee’s call in November was discussed. Reese asked if Ross and Jimerson would discuss the possible change with Olsen and Hall.

Approval of Minutes

Sept. 7, 2017, minutes approved as corrected.

Public Input

N/A

Program Owners

Tamikio Bohler and Rosemary Rixey stated there were no updates.

Subcommittee Updates

Subcommittee 1: Chair Dan Smolnik inquired on the status for the new issue (**Issue 36364** – Filing Deadline Countdown Clock for www.IRS.gov). Ross informed the committee there has been no response yet. The subcommittee will continue to wait for information before proceeding.

Issue 35819, Refundable Credit Communications. The subcommittee is waiting for edits from Kent Christensen. Ross will follow up with Christensen.

Subcommittee 2: Chair Millicent Kasal stated the subcommittee had a brief meeting. They are waiting for information to complete the referral. The subcommittee had two issues but will focus on Mobile apps. The October deadlines are planned so the referral can be presented to the full committee in November.

Screening Committee Update

Reese stated the new issues:

- **Issue 36304**, Ross sent TAS information to the submitter. Recommendation is to close this issue. It is not a TAP issue.
- **Issue 36305**, Ross contacted submitter. Not a TAP issue. Recommendation is to close this issue.
- **Issue 36308**, Ross will contact submitter with information on TAS. Recommendation is to close this issue.
- **Issue 36310**, Ross will refer submitter to TAS. Recommendation is to close this issue.
- **Issue 36369**, Ross will contact submitter. Recommendation is to close this issue. Ross mentioned there is no contact information for the submitter.
- **Issue 36395**, Ross will contact the submitter for additional information. Recommendation is to leave this issue in the Parking Lot for an additional month.
- **Issue 36415**, **Issue 36475** are not TAP issues. Recommendation is to close these issues.
- **Issue 36488**, claim of IRS denying taxpayer right. Ross contacted submitter with TAS contact number. Recommendation is to close this issue.

Parking Lot Issues

- **Issue 36241**, contacted the submitter and no response received back. The Screening Committee's recommendation is to close this issue.
- **Issue 36281**, contacted the submitter and no response received back. The Screening Committee's recommendation is to close this issue.
- **Issue 35606**, submitter complaining about fillable forms. Ross sent submitter information on fillable forms. Recommendation is to close this issue.
- **Issue 36124**, contacted the submitter determined not a TAP issue. Recommendation is to close this issue.
- **Issue 34733**, Reese prepared summary and sent to Ross. Leave in the parking lot one more month.

Decision: Full Committee Consensus to accept recommendations of the Screening Committee.



Outreach Activity Report

Reese stated the Outreach reports were submitted for last month. Ross stated there were two reports missing. She contacted the two members to remind them to turn in their reports. The consolidated report will be coming soon.

Action Items: Ross

- Post TAP Sept. 7, 2017, corrected meeting minutes to www.TAPSpace.org and send to TAP Secretary to post on to upload to Federal Advisory Committee ACT (FACA) database.
- Close all the issues on the Screening Report except **Issue 36395**. It will be placed in the Parking Lot for an additional month. Send information to Tamikio Bohler on **Issue 34733** and keep in the Parking Lot.
- Schedule November meeting with different date after the subcommittee meetings and send notice to members.
- Cancel the Nov. 28, 2017, screening committee meeting.
- Follow up on the status of this **Issue 35819** with Christensen.

Closing

Billups closed the meeting.

Next Meeting Thursday, Nov. 2, 2017, 1 p.m. ET

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



Gretchen Swayzer will be working with them on the report. Antoinette Ross will be working with Sheila Olsen to complete the Annual Report template. Billups gave an overview of the agenda.

National Office Update – Susan Jimerson

Jimerson stated during the Joint Committee's (JCs) planning session they discussed establishing a TAP election official, Sallie Mullins Thompson is the new election official for the recruitment nomination phase for the TAP Chair and the Vice chair for TAP year 2018. Swayzer, the lead analyst will be sending an email to members for their nominations by the end of September. Members are able to self-nominate. There will be a session to meet the candidates and the elections should be held in October. The outreach committee will have their meeting on September 21, 2017. There is a TAP pocket guide that provides quick tips and facts about TAP. It is available in the outreach toolkit. The JC will have their monthly call on September 27, 2017. The JC will have two more meetings until the end of the TAP year. Members are encouraged to remain focused on getting the referrals ready and up to the JC by October 25, 2017, and their last meeting on November 29, 2017.

Chair Report – Sheila Olsen

Olsen stated the IRS did release the www.irs.gov website. It has a new format. Some of the taxpayers' suggestions were taken into consideration. Members who are tax preparers were encouraged not to get discouraged because of the new format. Access from hand held devices will mirror what is shown on desk top computers. The system has made it easier for taxpayers to pay online.

Approval of Minutes

August 3, 2017 minutes approved as submitted.

Public Input

N/A

Program Owners

Tamikio Bohler suggested the committee obtain information from the Subject Matter Expert (SME) for any information pertaining to W&I.

Subcommittee Updates

- **Issue 35819 – Refundable Credit Communications** Olsen suggested tie in the Taxpayer Bill Of Rights (TBOR), the right to be informed would be valuable in the referral. Dan Smolnik agreed to extract from TBOR and add to the project statement.
Decision: Consensus full committee approved. Smolnik will forward the revised referral to Ross for submission to the JC.



- **Issue 34108 – AUR Examination Policy** Gail Reese stated the subcommittee's recommendation is to accept IRS response to leave up for reconsideration.

Decision: Consensus Full Committee IRS response accepted.

Subcommittee 1 – Dan Smolnik

Smolnik stated the committee has identified the next issue, **Issue 36364 – Filing Deadline Countdown Clock on IRS.gov**. Ross added she will send out information on this TCC TAP member submitted issue.

Subcommittee 2 – Millicent Kasal

Kasal stated that the subcommittee hopes to have their referral completed by September 29, 2017. They will discuss issue during their October meeting. The focus is updating the mobile applications. They will be looking at minor enhancements for the mobile version of the IRS website. Olsen suggested a SME be requested for more information. Ross sent the draft referrals to Ruth Tsujimura for completion.

Outreach Activity Report – Scott Hall

Hall stated in the month of August there were 10 members reporting. There were 26.1 outreach hours reported in events attended and a total audience of 30. Recognition was given to Jim Sowell 16.6 hours of outreach with a total audience of 21 people. He worked at several large business groups in the Panama City area, the Chamber of Commerce, and the Historical Society he is associated with. Kimberly Mason had 1.5 hours of outreach, 2 events and 9 people. Thank you to Sowell and Mason for their efforts. Hall added he made contact with his Local Taxpayer Advocate. He has some great ideas on specific events to be worked. Hall will be participating in a tax conference next week. Members were asked to share any bullet points to be incorporated at his presentation. Olsen added when adding hours on the excel spreadsheet it may lose data if toggling from one to the other. This may affect the calculations, making the totals incorrect. Members are advised to double check before submitting.

Action Items: Ross

- Receive referral from Smolnik and add to SAMS then forward to JC analyst to be placed on their agenda for the September 27, 2017 meeting.
- Forward approved minutes to TAP secretary to upload on www.TAPSpace.org
- Ross will send out email to an online service analyst to see if there is a prohibition regarding having animation on www.irs.gov.

Closing

Billups closed the meeting.

Next Meeting October 5, 2017, 1 p.m. EST



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



**Taxpayer Communications Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Aug. 3, 2017**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer

Attendance

- | | | |
|-------------------|--------------------------|--------|
| • Ellen Bemis | Presque Isle, Maine | Member |
| • Millicent Kasal | Lindstrom, Minnesota | Member |
| • Joseph Martin | Jefferson City, Missouri | Member |
| • Kimberly Mason | Chicago, Illinois | Member |
| • Sheila Olsen | Lawton, Oklahoma | Chair |
| • Dan Smolnik | Hamden, Connecticut | Member |
| • James Sowell | Panama City, Florida | Member |
| • Ruth Tsujimura | Honolulu, Hawaii | Member |

Absent

- | | | |
|-----------------|------------------------|------------|
| • Dawn Basciano | Sacramento, California | Member |
| • Scott Hall | Georgetown, Kentucky | Vice Chair |
| • Gail Reese | Buckeye, Arizona | Member |

Staff

- Javier Hernandez, Acting TAP Director
- Antoinette “Toni” Ross, Program Analyst
- Matthew O’Sullivan, Program Analyst
- Tamikio Bohler, W&I
- Debra Awalt, W&I
- Karin Rice, W&I
- Annie Gold, TAP Administrative Assistant

Roll Call

Quorum was met.

Opening/Welcome Susan Jimerson – DFO

Jimerson opened and welcomed members to the meeting. She stated TAP has reached the half way point in the TAP year. It ends on Nov. 30, 2017. The last Joint Committee (JC) meeting will be on Nov. 29, 2017. There are four JC meetings remaining to get referrals to them for consideration. Now is the time for committees to begin writing the referrals. Once the draft referral has been completed it goes to the TCC’s Quality Review for review/edits, next referrals go to Systemic Advocacy and the Attorney Advisor for review (they have 10 days to



complete their review process and to add any comments before returning it to the subcommittee). Once the subcommittee has received it back, if edits are needed those are completed. The referral will go on the agenda for the full committee meeting and if approved it will be elevated to the JC.

The information shared on the All TAP Quarterly call was in reference to the Virtual Outreach Program. The JC meeting along with the Strategy and Planning Meeting will be held on Aug. 22-23, 2017. They will be looking at ideas purposed and project proposals for the upcoming year of 2018. Feedback is requested from members to pass on to the Chair. This will allow Sheila Olsen to have as much information possible to use when drafting the proposals for 2018.

National Office Update – Javier Hernandez

Hernandez welcomed everyone to the meeting. He stated the TAP managerial meeting was a good meeting. They discussed ideas and activities for the upcoming months and for 2018. They discussed when doing outreach how to account for/or record comments from the public. There will be more discussion on topic later. The JC face to face meeting will be coming up and they are working on the agenda. The face to face meeting is for the JC members but the phone lines will be open for the public and members to call in. Members are encouraged to forward any issues or questions to be brought to the JC. Another focus that will be looked at is what does outreach look like; is information being gathered from the public; is TAP influencing/engaging them to share their issues and/or concerns. TAP needs to make sure to hear every voice.

Chair Report – Sheila Olsen

Olsen stated that she and James Sowell attended the Nationwide Tax Forum. Gratitude was shared with Hernandez for soliciting assistance to participate in the Tax Forums. The local stakeholder holds practitioner symposiums. Members are encouraged to call their local stakeholders for outreach opportunities. The stakeholders do have tax expos where members are able to participate and do outreach. Members would be able to hand out *Speak Up!* Brochures and possibly get some referrals to put into Systemic Advocacy Management System (SAMS).

Approval of Minutes

July 6, 2017, minutes approved as submitted.

Public Input

N/A

Program Owners

Debra Awalt stated she had no updates other than she attended the subcommittee calls so she can provide information when needed.

Subcommittee Updates

Subcommittee 1: Dan Smolnik stated during the last meeting discussion was held on how to approach Earned Income Tax Credit (EITC) awareness and improving participation by the eligible population. They discussed several information channels. Smolnik is preparing the referral. Olsen offered her and Scott Hall's assistance in preparing the referral if needed. Smolnik added he will be sending out a draft copy of the referral to committee members.

Subcommittee 2: Millicent Kasal stated at the subcommittee's last meeting they had two presentations from the IRS on Online Services. The subcommittee is focusing on mobile applications and mobile website. Kasal will send her notes to be included in the referral to the members for their input. Ruth Tsujimura will be preparing the referral for the subcommittee. Members will be assigned sections to provide assistant in getting more information to complete the referral.

Screening Committee:

James Sowell stated there were two new issues for this month:

- **Issue 36241 – Transcript Delivery System down:** Comments to submitter, not a TAP issue but Ross sent issue to Bohler; **Parking Lot**
- **Issue 36281 – IRS Customer Contact-Quality of Service:** Contact submitter for more information. Report back upon response; **Parking Lot**
- **Issue 32449 – Deadline for Online Filing:** Screening Committee recommendation; **Drop**
- **Issue 35687 – E-Services:** Submitter did not respond, Screening Committee recommendation; **Drop**
- **Issue 35979 – Filing Requirements Education:** No contact information from submitter for more information. Screening Committee recommendation; **Drop**
- **Issue 36078 – Tax Scams and Taxpayer Education:** Analyst will send out information on where to report scams. Screening Committee recommendation; **Drop**
- **Issue 36124 – Web Electronic Payments:** Research is still being conducted and obtaining relevant background information. Screening Committee recommendation; **Remain in Parking Lot**
- **Issue 36161 – Improving the Accessibility and Data on Form 990:** Submitter did not respond; Analyst sent submitter information on Form 990. Screening Committee recommendation; **Drop**

Decision: Full committee consensus approved actions of the Screening Committee.

Outreach Activity Report



Ross stated due to the timing of this full committee meeting, the activity report statistics were unavailable. She reported that 10 of 11 reports were turned in (there is an inactive member in the committee). That is a 91 percent participation rate. Hall will share the numbers via email and during next month's meeting. He has done a great job reminding members to input their information in their reports and he has included great tips for doing outreach. Tamikio Bohler added IRS has a great page for social media, it is www.EITC.IRS.gov. It has information to share via LinkedIn, Twitter, Facebook or however you choose to share it. It includes a multiple list of options where you can share the information. She encouraged members to utilize various options in performing outreach activities through newspapers, school postings, public service announcements, YouTube, etc.

Action Items

Ross shared the Action Items on her to do list:

- Post the approved meeting minutes onto www.TAPSpace.org and send meeting minutes to TAP Secretary to post onto the Federal Register
- Issues recommended for the Parking Lot will be updated in SAMS
- Issues recommended to be dropped will be updated in SAMS
- Send out email to members requesting projects that can be worked in 2018
- Forward link from Karin Rice on the **IRS Outreach Corner**

Jimerson recommended members send their suggestions on what the committee wants to work on in 2018. Ross will send an email to members for this feedback with a due date of Aug. 14, 2017. This information will be provided to Olsen prior to her attending the JC Planning Session.

Olsen mentioned she went on IRS website and searched for tax bloggers. There is one called **Tax Girl**. It has information on the new auditing website the IRS will be rolling out. The information is to help taxpayers determine what documents are needed for an audit. Olsen opens up her outreach presentations with Tax Girl articles that have IRS information. This is a good opportunity to solicit interests to come back and speak at another event. Rice added that the **IRS Outreach Corner** has information that can be used as another option on doing outreach. Rice will send the link to Ross who will share with the members.

Hernandez shared encouragement to the members to lean on each other when doing outreach activities. Everything members do is greatly appreciated. The staff is here to support members. If any assistance is needed, let Ross, Jimerson or Hernandez know.

Closing

Jimerson closed the meeting.

Next Meeting Sept. 7, 2017, 1 p.m. ET



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



**Taxpayer Communications Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
July 6, 2017**

Designated Federal Officer

- Javier Hernandez Designated Federal Officer

Attendance

- | | | |
|------------------------------|--------------------|--------------------|
| • Richard “Kent” Christensen | Boise, ID | TAP National Chair |
| • Scott Hall | Georgetown, KY | Vice Chair |
| • Millicent Kasal | Lindstrom, MN | Member |
| • Joe Martin | Jefferson City, MO | Member |
| • Gail Reese | Buckeye, AZ | Member |
| • Dan Smolnik | Hamden, CT | Member |
| • James “Jim” Sowell | Panama City, FL | Member |
| • Ruth Tsujimura | Honolulu, HI | Member |

Members Absent

- | | | |
|------------------|------------------|--------|
| • Dawn Basciano | Sacramento, CA | Member |
| • Ellen Bemis | Presque Isle, ME | Member |
| • Kimberly Mason | Chicago, IL | Member |
| • Sheila Olsen | Lawton, OK | Chair |

Staff

- Javier Hernandez, Acting TAP Director
- Antoinette “Toni” Ross, Program Analyst
- Matthew O’Sullivan, Program Analyst
- Tamikio Bohler, W&I
- Debra Awalt, W&I
- Rosemary Rixey, Customer Accounts Services
- Annie Gold, TAP Administrative Assistant

Roll Call

Quorum was met.

Opening/Welcome – Javier Hernandez, Acting DFO

Hernandez welcomed everyone to the meeting and stated he would cover the DFO and National Office Report combined. He shared his appreciation to committee members for all the hard work and volunteer hours they have already done. The TAP 2018 interviews are currently being wrapped up. Due to some applicants needing to reschedule, the final day had to be pushed into July for



interviews. The staff will be moving quickly into the credentialing stage. This is where fingerprints and background investigations are done. Once this has been completed, a list with recommendations for the Fiscal Year 2018 TAP members will be submitted. The TAP Managers, Sheila Andrews and Javier Hernandez will meet to begin planning for the upcoming TAP year. They will take a look at what has been done in the past year and look to see where TAP is headed for the upcoming year. A meeting with the Joint Committee (JC) will be held to discuss the official planning for TAP 2018. The tax forums are coming up. Approval has been given for the volunteers to attend. The secretaries are currently reaching out to the attending members for information in order to prepare the travel authorizations for reimbursements of travel expenses.

Chair Report-Scott Hall

Scott Hall covered for Sheila Olsen in her absence. He welcomed everyone to the call. Members were asked if they had received their nametags and business cards. If anyone has not received them, inform Toni Ross and she will follow up on getting them. Hall informed the committee during the June JC meeting there were four referrals that came up.

- Forms and Publications – Issue 35251, Form 8825 Instructions, Health Care Tax Credit. There needs to be more clarification on it.
- Notices and Correspondence – Issue 32699, Identity Thief Issue need additional language about the verification process.
- Issue 35772, Notice of 63C, why W2s and 1099R are not being received by employers.
- Issue 35892, 5747C IRS needs rewording on this Identity Thief notice.

Hall asked for the status update on the inactive member. Ross shared that Dawn Basciano got in touch with Sheila Olsen will be resigning. He encouraged members to consider volunteering to participate with the interview process for next year.

Approval of Minutes

June Minutes were approved as submitted.

Public Input

None

Program Owners

Debra Awalt stated the committee is doing great work as she has sat in on their meetings. If there are questions for Awalt, forward to Ross who will send to Tamikio Bohler. Bohler stated they will continue to get answers back as quickly as they can.

Subcommittee Updates

- Subcommittee 1: Chair Dan Smolnik stated the subcommittee had their meeting on June 14, 2017. A discussion was held on the non-participation rate of taxpayers. This may be based on fear and lack of knowledge. A flow chart to determine a taxpayer's eligibility was suggested and will be discussed further. Members are going to try and identify the demographics of groups of taxpayers. The subcommittee wants make them aware or familiarize them with filing requirements.
- Subcommittee 2: Chair Millicent Kasal stated the subcommittee had their meeting today at 11 a.m. They are waiting to receive information back from some of the social media sites and newsletters IRS uses. They have asked that someone from Online Services come and do a presentation. Ross is working on scheduling the meeting for the subcommittee. After the meeting, the subcommittee will discuss the information obtained and decide what the subcommittee will work on. Ruth Tsujimura volunteered to be the scribe for the TAP referral.
- Screening Committee: Chair Gail Reese stated the Screening Committee had six new issues and two that were in the parking lot.
 - **Issue 36078 – Taxpayer Scams & Education:** Deals with taxpayer choosing not to be scammed. The Screening Committee discussed developing something for the analyst to use to send to TAP submitters. Ross is conducting research on what she can send and will get back with the committee.
Recommendation: Leave in Parking Lot
 - **Issue 36119 – ADR Group – 1099 C Filing:** Collection company stating taxpayer will get forgiveness income reported from a credit card. Ross sent information to submitter.
Recommendation: Drop
 - **Issue 36124 – Web Electronic Payment:** Timing and assistance with late payments using ACH. This issue is related to Issue 32449 from last year. Ross doing more research.
Recommendation: Leave in Parking Lot
 - **Issue 36125 – Securing Correct info on “Where’s My Refund” Site:** Taxpayer’s personal issue. Ross sent information to submitter.
Recommendation: Drop



- **Issue 36157 – Penalties for Employers Not Providing W2s Timely:** Taxpayer’s personal issue. Ross sent submitter information.
Recommendation: Drop
- **Issue 36161 – Improving the Accessibility and Data on Form 990:** Subcommittee not sure of issue or concern. Ross responded to submitter with information on who has to file 990 on June 29, 2017.
Recommendation: Hold in Parking Lot for response, if no response Drop
- **Issue 36190 – View Your Tax Account Information & Get Transcript:** Deals with an incorrect cell phone and not able to get transcript. TAC committee working on a related issue.
Recommendation: Refer to TAC
- **Issue 33606 and 33979 – Related issues on how to deal with zero tax**
Recommendation: Leave in Parking Lot

The Screening Committee decision on Issues 36078, 36124 and 36161 is to place in the Parking Lot. Drop Issues 36119, 36125, 36157 and Refer Issue 36190 to TAC.

Decision: Full Committee Consensus is to accept the Screening Committee’s report.

Outreach Activity Report

Hall reminded members to always get management’s approval prior to any outreach travel if reimbursements are expected. The outreach meeting was held on June 15, 2017, and this was a very good meeting. Hall sent out some edits and suggestions on the Virtual Flyer to members prior to this meeting. Any questions on the Virtual Flyer please contact Hall. The June outreach stats based on the report received, there were 10 out of 11 members reporting. Good job on the participation. The following three members are recognized for their efforts:

- Sheila Olson was very busy in June. She attended multiple social and business events. She also attended a business expo.
- Jim Sowell had the most hours in June. He crossed state lines into Georgia for his outreach. Great job Sheila Andrews and Jim Sowell.
- Ross expressed how the Vice Chair, Scott Hall reached out to Kentucky Society of CPAs that has a large audience. This included the Association of Government Accountants, the Civic Chapter and the Occupational Association. Hall sent information from the www.irs.gov and it was a teachable moment that reached a lot of people.



Hall thanked members for the press releases he received. He informed the committee that he, Andrews, Hernandez, and Ross had discussed outreach plans for making outreach planners for new members to be presented to the committee. Any questions or need of assistance reach out to Hall.

Action Items:

Ross shared the Action Items on her to do list:

- Send email to Sheila Olsen regarding Dawn Basciano's resignation.
- Post approved Minutes to www.TAPSpace.org and send to TAP secretary to post onto the Federal Register.
- Issues recommended for the Parking Lot will be updated in Systemic Advocacy Management System (SAMS).
- Issues recommended to be dropped will be updated in SAMS.

Hernandez thanked everyone for their participation. He informed members there is no pressure to reach 5,000 people at one time; there are many means of reaching an audience. Some examples are via emails, one-on-one, family gatherings or social events. Everyone may not have a large list of people to reach out to, that does not mean the work you do doesn't matter. It does matter. Members are average taxpayers speaking on the behalf of taxpayers. There are a lot of avenues available on www.TAPSpace.org, and the Local Income Tax Clinics. Also, reach out to your Local Taxpayer Advocates.

Closing

Javier Hernandez closed the meeting.

Next Meeting August 3, 2017, 1 p.m. EST

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



**Taxpayer Communications Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
June 1, 2017**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer

Attendance

- | | | |
|-------------------|------------------|------------|
| • Ellen Bemis | Presque Isle, ME | Member |
| • Scott Hall | Georgetown, KY | Vice Chair |
| • Millicent Kasal | Lindstrom, MN | Member |
| • Kimberly Mason | Chicago, IL | Member |
| • Sheila Olsen | Lawton, OK | Chair |
| • Gail Reese | Buckeye, AZ | Member |
| • Dan Smolnik | Hamden, CT | Member |
| • Jim Sowell | Panama City, FL | Member |
| • Ruth Tsujimura | Honolulu, HI | Member |

Members Absent

- | | | |
|-----------------|--------------------|--------|
| • Dawn Basciano | Sacramento, CA | Member |
| • Joseph Martin | Jefferson City, MO | Member |

Staff

- Sheila Andrews, Deputy Director, Communications, Stakeholder Liaison and Online Services (CSO)
- Javier Hernandez, Acting TAP Director
- Susan Jimerson, Designated Federal Officer
- Toni Ross, Program Analyst
- Gilbert Martinez, Program Analyst
- Tamikio Bohler, W&I
- Rosemary Rixey, Customer Accounts Services
- Annie Gold, TAP Administrative Assistant

Member of Public

None

Roll Call/Annie Gold

Quorum was met

Opening/Welcome – Susan Jimerson



Jimerson welcomed everyone to the meeting. She stated the Interview phase of recruitment has begun and invitations are being sent to candidates being interviewed. Confirmation letters are starting to go out to applicants. There are a couple of responses that have come back from IRS for issues submitted last year from this committee. Matthew O'Sullivan, TCC's backup analyst, is out recovering and sends his regards. He should be back around the first week of July. In the meantime, Gilbert Martinez will serve as backup to TCC. Members who have not been able to sign onto www.TAPSpace.org are encouraged to let Ross, Hall and Jimerson know. The contract administrator has been contacted to assist in getting members access. Millicent Kasal and Kimberly Mason names have already been given for assistance in getting on TAPSpace. If any member is experiencing problems in getting their Activity Reports completed, they are encouraged to contact Ross. The agenda was shared with each member.

National Office Report – Javier Hernandez

Hernandez welcomed members to the call. He expressed thanks to the committee for their efforts on outreach events, coordination, partnership with the Local Taxpayer Advocates (LTAs), and government officials, in conducting outreach activities. He emphasized how critical it is to get out there and let the public know that TAP does exist. It is TAP's goal to provide recommendations that IRS might implement to improve the service they provide to taxpayers. It is very important that members submit a request for travel approval before incurring outreach expenses. A Manual Travel Authorization (MTA) must be prepared and submitted to the Beckley Finance Center five days prior to the expense being incurred. This is to ensure you will get reimbursed in a timely manner. Hernandez assured members their expenses that are limited to mileage will be allowed. There are no allowances for overnight travel at this time. He thanked members who have volunteered to serve on the 2018 interview panels. Members will be contacted for coordination of the interview schedule according to the times they have indicated their availability.

Chair Report – Sheila Olsen

Sheila Olsen welcomed everyone to the call. She stated it was mentioned at the Joint Committee's (JC's) meeting held on Wednesday, May 31, 2017, to follow up on the receipt of business cards and nametags. Members should have received them by now. If any member has not received their business cards and/or nametags need to let the analyst know. Information was provided to the JC on Issue 35819-Refundable Credit Communications (Subcommittee 1) and Issue 35874-IRS General Communications (Subcommittee 2). Olsen also asked the members if they want to assist IRS with the redesign they can participate in a brief seven to nine minute exercise on IRS.gov. When conducting outreach and questions come up, annotate on the Activity Report. It will be placed in Systemic Advocacy Management System (SAMS) Database.



Approval of Minutes

May 4, 2017 Minutes were approved as submitted.

IRS Responses

Issue 31082 – Mail Tracking and Issue 34106 – Refundable Credit Compliance were both rejected by IRS.

Decision: Consensus to accept IRS response.

Public Input

None

Program Owners

Rosemary Rixey stated there were no updates at this time.

Subcommittee Updates

- Subcommittee 1 has not held their meeting yet so there is no report-out. The next Subcommittee 1 meeting is on Wednesday, June 14, 2017. Ross stated IRS answers to the sub's questions were received and sent to members. Subcommittee 1 is in need of a temporary chairperson. At the June 14, 2017, meeting a decision will be made on the chairperson.
- Subcommittee 2, Millicent Kasal stated Subcommittee 2 will meet next week, Tuesday, June 6, 2017. They have received information back with five different documents. Emails will be sent out to the group to be prepared for the next call. Ross added the next meeting on Tuesday, July 4, 2017 is a holiday and suggested the group discuss during next week's call.

Screening Committee Update

Gail Reese stated the Screening Committee did not have any new issues. They are still waiting on information for the issues that were placed in the Parking Lot. Ross suggested TCC members be proactive by going out into the communities and gather grassroots issues.

2017 Activity Report

Scott Hall stated the Outreach Meeting was held on Thursday, May 18, 2017. It was a very productive meeting. A lot of ground was covered. An email was sent out with a Virtual Outreach Flyer. It was presented during the meeting. If members are interested in getting into social media, that would be a great way on how to get started. If anyone did not receive a copy, let Hall know. Members were asked to confirm who have or have not been in touch with their LTA. Hall canvassed the members to see who have or have not been in touch with their LTA. A reminder to seek prior approval for any outreach travel in order to be

reimbursed was emphasized. Presidential Medals was discussed last year and during the face-to-face meetings. There is Bronze, Silver and Gold status. You must achieve a certain number of hours to obtain each status. Jimerson stated the minimum is 200 hours for the Bronze. Virtual Training is available and is provided by the staff. It is done on a monthly and quarterly basis. More information will be shared during the next outreach call on Thursday, June 15, 2017. Based on May's outreach activity the following stats are:

With two reports still not in, 38.5 outreach hours and total audience of 261 people for the period between April 26, 2017 and May 25, 2017.

- Chair Sheila Olsen from Oklahoma: She had 13.6 outreach hours with a total audience of 183 people. She had a mixture of events: Large business events, small business events, civic businesses, LTA activities, VITA Sites, business expos, press releases, social media. Olsen suggested contacting the local paper is easy to do and people would know who you are.
- Jim Sowell from Florida had 14.3 hours a total audience of 41. Sowell had some one-on-one meetings. He has been in touch with Senators and a Congressman. Sowell added it takes time and effort. He mentioned he sent out 60 press releases. Hall added this should be reported in the comments section of the Report.
- Gail Reese from Arizona reported one hour of outreach, total audience 22 people. This was at a Stakeholder Liaison Meeting in Phoenix. Recognition to Reese for making the most of a one-hour event. Reese stated she has a meeting with the LTA every Friday.

Hall expressed appreciation to everyone for putting their outreach hours in. If there are any questions let Hall know. Tamikio Bohler asked if there is a tracking process of all of the outreach events especially the free activities. Hall responded yes it is tracked on the Outreach Reports and added into the Annual Report. The Annual Report is available on www.ImproveIRS.org

Action Items:

Ross shared the Action Items:

- Upload approved May 2017 meeting minutes onto www.TAPSpace.org and forward to TAP secretary for uploading onto the FACA database.
- Update SAMS with Issues 31082 and 31086 to reflect committee's approval of IRS recommendations.
- Jimerson will reach out to Dawn Basciano for status of participation on the TAP.

Hernandez added the Annual Report is shared with Treasury and the IRS Commissioner and all of the issues and recommendation, whether adopted or



not, changed or rejected, impact members trying to make customer service to taxpayers better. Thank you to all members for all the dedication, effort, and hard work being done.

Closing

Susan Jimerson closed the meeting.

**Next meeting: Thursday, Aug. 3, 2017
1 p.m. ET; noon CT; 11 a.m. MT; 10 a.m. PT; 7 a.m. HT**

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



**Taxpayer Communications Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
May 4, 2017**

Designated Federal Officer

- Sheila Andrews Acting Designated Federal Officer

Attendance

- | | | |
|-------------------|--------------------|------------|
| • Ellen Bemis | Presque Isle, ME | Member |
| • Scott Hall | Georgetown, KY | Vice Chair |
| • Millicent Kasal | Lindstrom, MN | Member |
| • Joe Martin | Jefferson City, MO | Member |
| • Sheila Olsen | Lawton, OK | Chair |
| • Gail Reese | Buckeye, AZ | Member |
| • Dan Smolnik | Hamden, CT | Member |
| • Ruth Tsujimura | Honolulu, HI | Member |
| • Kimberly Mason | Chicago, IL | Member |

Members Absent

- | | | |
|-----------------|-----------------|--------|
| • Dawn Basciano | Sacramento, CA | Member |
| • Jim Sowell | Panama City, FL | Member |

Staff

- Sheila Andrews, Acting DFO
- Antoinette “Toni” Ross, Program Analyst
- Gilbert Martinez, Program Analyst
- Tamikio Bohler, W&I
- Debra Awalt, W&I
- Annie Gold, TAP Administrative Assistant

Member of Public

None

Roll Call

Annie Gold

Opening/Welcome/National Office Report

Sheila Andrews informed the committee she will be the Acting Designated Federal Officer on today’s call and welcomed everyone to the meeting. She stated the 2016 Annual Report is expected to be received from the printers this week. Javier Hernandez will be the Acting TAP Director in the next two weeks. Andrews has been moved to a different level but she will still be involved with



TAP. The Quarterly Review meetings will begin to be scheduled. Members will see information on these meetings next week. Next week is Public Service Awareness Week. Members were encouraged to send in any information they would like to share. She shared the overview of the agenda.

Chair Report – Sheila Olsen

Sheila Olsen welcomed everyone to the call. This is the first full committee meeting. She thanked members for their participation and efforts. She assured members she would be more active in sharing information with the committee as it becomes available. Chairs and vice chairs of the Subcommittees were encouraged to submit in writing their requests for Subject Matter Experts (SMEs) or for whatever information they would need. She would like to be copied on reports from the committees.

Approval of Minutes

Face-to-Face minutes were approved with changes submitted by Antoinette Ross. She removed the guest speakers from page two. Gail Reese will forward her minor changes via email today.

Program Owners

Debra Awalt stated after reviewing some of the screening report issues there were some comments she had.

- **Issue 35220 – Accessing Account Online:** It had a suggestion/recommendation to show payments had been made. This information is available on *Online Accounts* located on www.irs.org. After authenticating who the person is accessing the information, payments for the last 18 months can be viewed.
- **Issue 35687 – E-Services:** I checked with E-Services and registration is based on an individual, not two authorized people. This is unclear as to what was needed.

Awalt assured the committee she would be happy to assist in getting information as needed.

Subcommittee Updates

Subcommittee 1

Ross stated Subcommittee 1 has not held their meeting yet. There is no report out for Subcommittee 1.

Subcommittee 2

Millicent Kasal, Subcommittee 1 Chair, stated Subcommittee 2 is working on how IRS can reach out to more people whether on the website or various websites, mobile applications, social media accounts, etc. The subcommittee reviewed the

notes from the Face-to-Face sessions. They came up with questions to be presented the SME. They will be gathering more research to try and break down the demographics on the number of people coming and using the sites. The questions were sent to Andrews. Sheila Olsen added that she forwarded to Ross and will wait for feedback.

Screening Committee

Gail Reese, Screening Chair, the Screening Committee had a long meeting and the decisions on the following issues are below:

- **Issue 35317 – Tax Form 1040 adding Email Address:**
 - Suggest email addresses to the Tax Form 1040 so IRS can send emails, recommendation from the committee is to drop this issue. **DROP**
- **Issue 35220 – Accessing Accounts Online:**
 - Elderly taxpayer unable to check estimated payment status. **DROP**
- **Issue 35404 – Reporting Tax Scams via Online Form:**
 - Easy way to report tax scams online – this issue should be referred to Special Projects who deals with ID Theft. **REFERRED**
- **Issue 35426 – Online Service-POA for C Corp:**
 - The committee has requested more information to support the issue. **PARKING LOT**
- **Issue 35479 – How to Drastically Reduce Taxpayer Fraud:**
 - Delay tax processing on Returns past April 16, 2017. **DROP**
- **Issue 35496 – VITA Information in Michigan:**
 - VITA information in Michigan, issue referred to Tamikio Bohler. **DROP**
- **Issue 35606 – Filing electronically:**
 - Taxpayer does not want to deal with third party filers and want free file-able forms for e-filing. Committee will address this issue. Ross will research and get back with committee. **PARKING LOT**
- **Issue 35641 – Training for Small Business:**
 - Taxpayer wants IRS employees to train small business owners on preparing Form 941s, 1099s, etc. Antoinette Ross sent response to the submitter. **DROP**
- **Issue 35663 – FTPS payroll Tax Deposit:**
 - This issue lacks clarity from taxpayer. No contact information. **DROP**
- **Issue 35664 – IRS Correspondence not being Forwarded:**
 - This is a post office issue not IRS. **DROP**
- **Issue 35687 – E-Services:**
 - Analyst will attempt to contact taxpayer for further information. **PARKING LOT**
- **Issue 35806 – Contact Numbers on Letter not being answered:**



- Future State issue. **DROP**
- **Issue 35896 – 1095 Due Dates:**
 - Staggered due dates for 1095. **DROP**
- **Issue 35979 – Filing Requirements Education:**
 - Issue placed in Parking Lot to be revisited. **PARKING LOT**

The recommendation from the Screening committee is to **Drop** Issues: 35317, 35220, 35479, 35496, 35641, 35663, 35664, 35806 and 35896.

The recommendation from the Screening Committee is to refer Issue 35404 to the Special Projects Committee and retain Issue 35426, 35606, 35687, 35979 in the Parking Lot for additional information.

Ellen Bemis asked about Issue 35806: Would part of the recommendation be to take part of the information off the letter or add a statement? Has there been any discussion on changing the letter? Reese stated there is no positive feedback from IRS on any of the suggestive changes. There is a general contact number that is placed on the notices. The problem is a live person is not able to be consulted to answer their concerns. Disconnects are being used. The percentage is around 73 percent of level of service being done.

Screening Report was “motioned and seconded.”

2017 Activity Report

Scott Hall stated TCC began with a bang in April. He reminded members the reports are due by the 25th of each month. The first Outreach call was held and two reports were still outstanding. An email was sent the members to get the reports in. Based on all the Activity Reports that are in, there were 154.7 Outreach hours; total audience reached 1,482 people. The report does include some hours from January and April 24, 2017. Sallie Mullins Thompson, TAP’s vice chair, asked all of the vice chairs to submit outstanding performers. Hall shared three outstanding performers he will be sharing with Thompson:

- Jim Sowell from Florida had 58.8 hours and a total of 439 people. Sowell was the speaker at a Bay County, Florida Chamber of Commerce meeting. There were a total of 350 people. He was the featured speaker with an audience of 17. March 27, 2017, through April 24, 2017, with a total audience of 72. His one on one audience was a mixture of Bay County Florida Historical Society, Activities with his Local Taxpayer Advocate (LTA), TCE Sites, VITA Sites, Kiwanis Club, and mixture of friends, family and extended businesses. This is very outstanding with Sowell being a first year TAP member.



- Chair, Sheila Olsen from Oklahoma. She had 30.6 Outreach hours with a total audience of 25 people. She had a mixture of civic businesses, LTA Activities, VITA Sites, and Business Expos.
- Ruth Tsujimura from Hawaii reported 10 hours of Outreach, total audience 262 people. She had a mixed group of city groups and outreach activities; including LTA, Information Fairs at the Hawaiian State Fair, the McKiekee Christian Church and the State of BBKA (Bureau Business Commerce Affairs).

They all have done an outstanding job. All three have active relationships with their LTAs. This is critical in having a successful Outreach. Hall encouraged everyone to get involved and develop a relationship with their LTAs.

Action Items:

Ross shared the Action Items on her to do list:

- Get revisions for the Face-to-Face meeting minutes from Reese, incorporate them and forward final to TAP Secretary.
- Go into SAMS update each Issue from Screening Committee. Close out Issues 35317, 35220, 35479, 35496, 35641, 35663, 35664, 35806 and 35896 that were dropped.
- Refer Issue 35404 to Special Projects.
- Place Issues 35426, 35606, 35687, 35979 in the Parking Lot until more research has been received.
- Report out on next month's meeting research findings.

Closing

Sheila Andrews closed the meeting.

**Next Meeting: Thursday, June 1, 2017
1 p.m. ET**

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



**Taxpayer Communications Committee (TCC)
Taxpayer Advocacy Panel (TAP)
Face-to-Face Meeting Minutes
March 23, 2017**

Designated Federal Officer

- Sheila Andrews Designated Federal Officer (DFO)

Attendance

- | | | |
|-------------------|--------------------|--------|
| • Ellen Bemis | Presque Isle, ME | Member |
| • Scott Hall | Georgetown, KY | Member |
| • Sheila Olsen | Lawton, OK | Member |
| • Dawn Basciano | Sacramento, CA | Member |
| • Joe Martin | Jefferson City, MO | Member |
| • Kimberly Mason | Chicago, IL | Member |
| • Jim Sowell | Panama City, FL | Member |
| • Millicent Kasal | Lindstrom, MN | Member |
| • Ruth Tsujimura | Honolulu, HI | Member |

Attendance Via Conference Call

- | | | |
|---------------|-------------|--------|
| • Gail Reese | Buckeye, AZ | Member |
| • Dan Smolnik | Hamden, CT | Member |

Staff

- Sheila Andrews, TAP Director
- Kim Stewart, EDCA
- Javier Hernandez, TAP Acting Director
- Antoinette "Toni" Ross, TAP Analyst
- Fred Smith, TAP Analyst
- Tamikio Bohler, W&I
- Karin Rice, W&I
- Johnnie Beale, W&I
- Betty Scott, W&I
- Cindy Jones
- Anne Smiley, W&I (Presenter)

Roll Call

Quorum was met.



Opening/Welcome DFO Report – Sheila Andrews

Andrews welcomed everyone to the meeting. This is the first official meeting for Taxpayer Communications Committee in this TAP year 2017. Announcements followed by self-introductions.

National Office Report – Sheila Andrews

Andrews spoke about the Future State of the IRS and what it means to the National Taxpayer Advocate (NTA).

Chair Presentation

Ross gave the “So You Want to be a Chair” presentation to the committee.

Chair Elections

Chair elections followed the presentation. Sheila Olsen, Lawton, OK was elected chair and Scott Hall, Georgetown, KY was elected Vice Chair. Chair leadership bi-weekly calls will be scheduled with TAP Chair Sheila Olsen. The full committee schedule: first Thursday at 1:00 p.m., EST with April 6, 2017 being an admin meeting and May 4, 2017, will be the first official meeting.

Identify Members for Subcommittees

Subcommittee 1 – Issue 35819-Refundable Credit Communications

- Dawn Basciano (Lead); Joseph Martin; Scott Hall; Ellen Bemis; Dan Smolnik

Subcommittee 2 – Issue 35874-IRS General Communications

- Millicent Kasal (chair); Kimberly Mason; Ruth Tsujimura; Sheila Olsen; James Sowell; Gail Reese

Screening Subcommittee

- Gail Reese (chair); Scott Hall; Millicent Kasal; James Sowell

Internal Communications Committee

- James Sowell; Dawn Basciano

Outreach Committee

- Scott Hall

Quality Review:

- Dawn Basciano; Joseph Martin; Ruth Tsujimura

Approval of Minutes

November 2016 minutes were approved.

Staff Roles and Responsibilities discussion (Ross)

- Methods of Communications
- Ground Rules and Telephone Etiquette
- Minutes/Minutes Approval



- Establish Meeting Quorum (7)
- Meeting Survey Assessments
- Consensus

Members of the Public

No representative from the public present today.

Meeting Dates and Times determined

- Taxpayer Communications Committee: First Thursday at 1 p.m. EST
- Screening Subcommittee: Last Tuesday at 2 p.m. EST
- Subcommittee 1 – Second Wednesday at Noon EST
- Subcommittee 2 – First Tuesday at 2 p.m. EST

New Issue Screening Training

Ross gave the “How to Screen an Issue Presentation.” The TAP TCC Issue Screening Report was given to the TAP members for their information and just to see how an issue screening report looks like. The Screening Subcommittee will work the Issue Report at their first subcommittee meeting on April 25, 2017 at 2 p.m. Ross will provide an updated report to the committee before the screening meeting. Ross also gave out the IRS partial response to **Issue 34106-ITINS Refundable Credits**.

2017 Project Focus Review (Presented to the Full Committee)

Issue 35819-Refundable Credits Communication

Presentation given by Anne Smiley regarding general communications about refundable credits through various methods such as www.irs.gov; partnerships with various groups and organization such as Volunteer Income Tax Assistance (VITA), preparers, Low Income Tax Clinics (LITC) and social media such as Twitter.

IRS needs TAP’s assistance to determine if there are additional methods and avenues to educate taxpayers about refundable credits; develop cost effective solutions due to recent budget cuts.

Wage & Investment (W&I) Program Owner

Karin Rice	Betty Scott
Anne Smiley	Johnnie Beale

Q. Can items be sent to TAP members for their followers?

A. EITC Central has many items to be used for distribution

Q. Facebook for general items

A. There is too much interaction with taxpayers – IRS will look into using Facebook for letting taxpayers know about EITC Awareness Day



Q. How many potential takers

A. 1 out of 5 does not get the credits but would otherwise be entitled to the credit(s)

Q. What percent filed by practitioners?

A. It's pretty high

Q. Does the IRS use the data to contact taxpayers who can claim the credits?

A. They did postcards (Anne Smiley will get back to us with that information)

Subcommittee 1 – Breakout Meeting

Issue 35819-Refundable Credits Communication

Discussion Summary

Subcommittee 1 – started the discussion talking about the ways IRS is already communicating about refundable credits. They also brought up the avenues the IRS should be communicating through. IRS needs to reach out to outside partnerships to spread the word:

- Banking
- PayPal
- Google
- Public Services Announcements (PSAs)

IRS should go to the agencies where taxpayers need their services:

- WIC; SNAP; Headstart; Section 8 Housing; Unemployment Offices; Hospitals; Employers; Department of Education; Department of Health and Human Services; AARP; etc.

Questions for the Subject Matter Expert (SME)

1. Are there patterns to why taxpayers have not claimed the credit?
2. What are the demographics of the 20 percent that are not claiming the refundable credits?
 - a. Is there demographic data on the 20 percent?
3. What is the data the IRS is relying on that says 1 out of 5 taxpayers are eligible but are not claiming the credit?
4. What is the response rate on the postcards that were sent to those 20 percent?
 - a. Can you share that data with the committee?
5. Why not go to Facebook for other information?
6. How do you define an “eligible worker”?
 - a. Age
 - b. Single



- c. Head of Household
 - d. 2 or more children
7. Can we get more information regarding cross functions?

The members also discussed the education credits. There is a lot of confusion regarding claiming education credits. Understanding the qualifications of the credits and making it clear what you can and cannot do.

Subcommittee 2 – Issue

Subcommittee 2 – Breakout Meeting (Fred Smith, Program Analyst)

Issue 35874 – General IRS Communication to taxpayers

Mobile Apps, YouTube Channel, Social Media, Space/Capacity on the phones. What are the resources?

Discussion Summary

Questions for the SME:

- How many people have downloaded the apps?
- How many IRS apps exist?
- How many transcripts requested (TACs vs Online vs. Phone):
- What are the public services announcements (PSA's) on the phone?
- Press releases vs. Electronic Notices?
- Which languages are being requested the most?

Items to potentially address:

- Quick start guides on how to go to online services (w/screen shots).
- There should be a tangible item for reference.
- Having a “help” button to explain or define terms on the website or using images/logos for issue on www.irs.gov.
- Usability: Do marketing on Facebook and other social media during filing season to educate the public about other resources available. Direct text alerts from the IRS?

Closing

Sheila Andrews closed out the meeting at 4:34 p.m.



**Taxpayer Communications Committee (TCC)
Taxpayer Advocacy Panel (TAP)
Face-to-Face Meeting Minutes
March 24, 2017**

Designated Federal Officer

- Sheila Andrews Designated Federal Officer (DFO)

Attendance

- | | | |
|-------------------|--------------------|------------|
| • Ellen Bemis | Presque Isle, ME | Member |
| • Scott Hall | Georgetown, KY | Vice Chair |
| • Sheila Olsen | Lawton, OK | Chair |
| • Dawn Basciano | Sacramento, CA | Member |
| • Joe Martin | Jefferson City, MO | Member |
| • Kimberly Mason | Chicago, IL | Member |
| • Jim Sowell | Panama City, FL | Member |
| • Millicent Kasal | Lindstrom, MN | Member |
| • Ruth Tsujimura | Honolulu, HI | Member |

Attendance Via Conference Call

- | | | |
|---------------|------------|--------|
| • Dan Smolnik | Hamden, CT | Member |
|---------------|------------|--------|

Staff

- Sheila Andrews, TAP Director
- Kim Stewart, EDCA
- Javier Hernandez, TAP Acting Director
- Antoinette "Toni" Ross, TAP Analyst
- Fred Smith, TAP Analyst

Roll Call

Quorum was met.

Welcome/Announcements-DFO Sheila Andrews

TAPSpace

Ross went live on TAPSpace; showed members how to navigate TAPSpace since this is where all member information is found and items can be uploaded. Question and answer session was held after the demonstration. Ross let the members who were not on TAPSpace yet know that as soon as the system can be corrected they will be invited to log onto TAPSpace.



WebEx

Ross explained in detail what WebEx was and that TAP meetings will be conducted via WebEx starting 2017. Ross also sent several WebEx meeting requests to the analysts and they shared their screen with the members. Question and answer session was held after the demonstration.

Activity Reports

Ross showed and demonstrated how the TAP TCC Activity Report should be filled out. She let the members know that all activity reports should be completely filled out and sent to Taxpayeradvocacypanel@irs.gov, cc to Kudiratu Usman, and Antoinette.m.ross@irs.gov by the twenty-fifth of each month. Ross also let them know that she will send a "friendly" reminder on the fifteenth of each month.

General Questions and Answer Session

Q. Does the IRS know the value of each TAP member? For example, TAP members take out of their time volunteering over 300 hours, does the IRS really understand what it costs for a member to volunteer. Is that tracked?

A. The IRS does track plenty of information regarding the volunteers, but I do not think they track the actual value of each TAP member. We do keep track of each hour that members put into their activity report, which is why it so important the members keep accurate track of their volunteer time. After the 3-year tenure, members are put in for the Presidential Volunteer Award.

Q: Are TAP members' emails between TAP members subject to the Freedom of Information Act (FOIA)?

A. Andrews sent emails to FOIA staff on March 24, 2017.

Closing

Andrews closed the meeting at 11:30 a.m.