

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
March 25, 2021**

Designated Federal Official (DFO)

- Terrie English TAP Director

Members Present

- Laurie Brock Chair, Special Projects Committee
- Jim Buttonow Chair, Taxpayer Communications Committee
- Bradford Folta Chair, Notices and Correspondence Committee
- Martha Lewis Chair, Tax Forms and Publications Committee
- Eugene "Gene" Lillie Chair, Taxpayer Assistant Centers Committee (TAC)
- Robert "Bob" Moretti National TAP Chair
- Lacy Rice Chair, Toll-Free Phone Lines Committee
- Christine "Chris" Scott Chair, Internal Communications Committee (ICC)
- Nina Tross National TAP Vice-Chair

Visiting Members

- Felicia Dixon Vice-Chair, Notices and Correspondence Committee
- Charles Jones Member, Notices and Correspondence Committee
- Andrea Price Member, Toll Free Phone Lines Committee

Staff

- Lisa Billups Program Analyst
- Kevin Brown Management Assistant
- Conchata Holloway Program Analyst
- Cedric Jeans TAP East Chief
- Susan Jimerson TAP West Chief
- Gilbert Martinez Program Analyst
- Rosalind Matherne Program Analyst
- Matthew O'Sullivan Program Analyst
- Robert Rosalia Program Analyst
- Antoinette "Toni" Ross Program Analyst
- Fred Smith Program Analyst
- Michael Odom Program Analyst Wage and Investment (W&I)

Members of The Public

None

Welcome

English welcomed everyone and opened the call at 1:30pm ET. English sent a special thanks to the committee chairs and vice chairs for attending the focus group meeting this morning. Taxpayer Advocate Services (TAS) may call on TAP again for meetings like this in the future. Moretti reviewed the agenda.

Roll Call

Quorum was met for the meeting.

DFO/National Office Update

English reported that the filing season deadline has been extended to May 17, 2021, and June 17, 2021 for the state of Texas. The business cards and the Annual Report are about to be sent out to the members as early as next week. English noted that being part of the focus group today will lead to the IRS asking for us to be part of these events in the future.

English will forward the responses to some of the questions that were not answered on last week's All TAP Virtual meeting from the National Taxpayer Advocate (NTA). Please encourage your committees to go into www.tapspace.org to setup their accounts so they can receive messages and reports needed for their TAP duties. The staff is working on uploading activity reports to the site also, according to English. Billups reported the recruitment period will be open from April 5, 2021 to May 14, 2021 and a solicitation will go out to the TAP for assistance in locations we are looking to get new members from.

TAP Managers Update

Jimerson reported newsletter articles are due today. Send articles or information you want to get posted to ICC and your committee Vice-Chair.

Jeans reported Forms and Publications member Thomas Mistick resigned, also the Special Projects committee added William Vetter, from Texas.

Set Dates & Times for 2021 JC Meetings

Fourth Thursday of the month at 1:30pm.

November's meeting will be one week early this year due to the Thanksgiving holiday.

Approval of November 19, 2020 JC Meeting Minutes

Moretti explained how motions will be made during JC meetings, so everyone understands the process. Moretti explained that the presenter of an issue is considered the initial motion. After the initial motion, the issue needs to be seconded and discussed, as necessary.

M. Lewis motioned; Folta seconded

Action: Minutes approved as submitted.

TAP Chair Report

Moretti reported reaching out to new members helping them get familiar with TAP. Moretti also spoke of the focus group for underserved elderly taxpayers. Moretti thanked those who asked questions for the All TAP quarterly meeting.

TAP Vice Chair Report

Tross spoke of members reaching out to local groups and their Local Taxpayer Advocates (LTAs). Tross reminded everyone to turn your Activity Report in which is due today. Tross said They have a Volunteer Income Tax Assistance (VITA) project coming up. Tross asked to share these opportunities with your members so they can take advantage of them.

Public Comments

None

Project Committee Review/Activities

Notices and Correspondence

Issue 44244 Notice 1445 (N1445)

This referral seeks to update the numbers and time zones the call is made and make the lines available according to the area code of the number dialed. Folta Motioned; Rice Seconded Moretti suggested changing the “language” to “wording” within the referral. Folta supported the “language” instead of “wording” based on their research. There was a discussion about this referral being close to the LEP Notice 1445, Issue 44396, that is a consolidated effort with the Special Projects and Forms and Publications committees. The other possibly related issues will be reviewed and may be associated to this referral if necessary.

Action: Issue elevated to IRS for consideration

Toll Free Lines

Rice reported an issue regarding working with IRS via test calling and customer feedback. They are working another issue pertaining to the expansion of customer call back technology. They are also working on the Go back Option issue 43095. The IRS is considering this issue. They are working on Issue 42231 IRS telephone number being listed on the Form 1040 instructions. This is being worked on now. Pam Memmer and Rene Tiongquico are both working very hard for the committee.

Tax Forms and Publications

Lewis reported losing one member, but they are still working very hard despite having seven new members. One of the new members, Christine Scott, is ICC Chair. The committee is working on several issues:

Issue 43449- 2019 1099 DIV- Qualified Business Income Threshold.

Issue 43731- Form 1310- Claiming Refund Due to a Deceased Taxpayer.

Issue 41760- Form 2210 F (Rebuttal)

New issues:

Issue 43820- Donation Deductions for Sch A.
Issue 43953- Pub. 502- Medical Expenses.
Issue 43939- Form 1040 Line 2A- (Reaching out to submitter for clarity).
44396 Schedule LEP and Notice 1445- This issue is being researched currently.

Taxpayer Communications

Buttonow reported working 12 issues, three of which are legacy issues. They are working one redundancy issue regarding accelerating adoption and development of online accounts. Buttonow is looking for other examples of how online accounts could help with taxpayer issues right now since there are so many issues with phone calls flooding in and not being properly addressed. They have a few issues worked in real time to include late season tax changes, unemployment compensation and tax credits and what taxpayers should do to be sure to apply for these credits like amended returns or not.

Taxpayer Assistance Center Improvements

Gene Lillie reported working on some legacy issues at this time and are looking for new ones.

Special Projects

Brock reported working on an international issue and they recognized the need for digital access for these taxpayers. Both subcommittees are working hard and should be getting a lot more issues coming very soon.

Internal Communications Committee

Scott reported getting two new Facebook administrators. They are currently working the newsletter but no formal issues. They have potential issues about updating, expanding, or improving the new www.Tapspace.org website. They are also considering including new challenge questions for taxpayers looking to join the Facebook group.

Round Table

- IRS said refunds from unemployment taxes don't need to file amendments per Brock.
- Stimulus payments for married taxpayers who lost a spouse last year.
- Rice inquired about preventing trolls to joining the Facebook page with challenge questions. This topic is still being reviewed by the ICC according to Jimerson.
- Moretti asked the Chairs to give a summary of this meeting to their committees to keep them informed about what TAP is doing.
- Buttonow asked how do we make digital customer service a priority for policy makers and Congress? Doing this strategically is the goal. English said the NTA, Erin Collins, has this as a priority for TAS and is working this.
- English reminded the committee that the NTA is our legislative outlet and we are to keep all of our suggestions within TAP to avoid issues for the committee.
- Buttonow asked what issues online accounts can address as examples to push forward.
- Lillie suggested using this as an outreach opportunity to educate taxpayers to setup online accounts with the IRS.

- Rice asked the Chairs to poll their constituents to see if some of them do not have access to the internet, so they are considered when decisions are being made.

Closing

English asked members to use their cameras for tomorrow's meeting. English closed the call at 2:57 ET closed.

Next Joint Committee Meeting April 22, 2021 at 1:30pm ET

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