

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
April 22, 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) (Absent)
- 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

- Andrea Price Member, Toll Free Phone Lines Committee

Staff

- Kevin Brown Management Assistant
- Conchata Holloway Program Analyst
- Annie Gold Management Assistant
- Cedric Jeans TAP East Chief
- Susan Jimerson TAP West Chief
- Gilbert Martinez Program Analyst (Absent)
- 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)
- Dale Hawkins Tax Analyst (W&I)

Members of The Public

None

Welcome

English welcomed everyone and opened the call at 1:30pm ET. Moretti reviewed the agenda.

Roll Call

Quorum was met for the meeting.

DFO/National Office Update

English reminded the committee that the TAP recruitment season is open and invited members to solicit taxpayers that you may think would be a good fit for the TAP next year. English also made note that members are putting this out on their social media pages. Please save the date June 17, 2021 for the next quarterly All TAP Meeting. We will have Kenneth Corbin, Commissioner of W&I as our special guest. Please send any questions for him to English prior to the meeting so they can be answered.

We are working with Rhonda Kirby, Executive Director of Case Advocacy, for assistance in focus group meetings. We will also be working on a focus group for underserved Native Americans. English, the national Chair and Vice Chair had a meeting with the National Taxpayer Advocate (NTA) that will be discussed in more detail later. English thanked the committee for all they have done so far with a great start to the TAP year.

TAP Managers Update

Jimerson reported Shani Bowser resigned.

Jeans reported losing Hodari Brown and Denise Besson replaced him. Please welcome her.

Approval of March 25, 2021 JC Meeting Minutes

There were several edits and corrections to the minutes. Buttonow motioned; Tross seconded
Action: Minutes approved as submitted.

TAP Chair Report

Moretti reported speaking to the NTA and found that she cares a lot about TAP and wants to know what we think. She wants solutions to accompany problems that we bring to her attention. She is currently working on Most Serious Problems (MSP) and focused a lot on E-Filing. She said that TAPs help with taskforce issues is truly helping to shape the future work and ideas of the IRS.

The Annual Report is printed and will be mailed to your homes. Buttonow asked should we have a strategic priorities section of importance for the IRS? How do we best communicate this to the IRS, so we influence these changes? Moretti would like this to be part of the next Annual Report.

Moretti wants the committee to get referrals in as fast as we can. Rebuttals are decided by the submitting committee and only requires that the committee let the JC know they are sending it back to the IRS.

TAP Vice Chair Report

Tross spoke about the NTA wanting the IRS to become more of a service organization. They will do more outreach and become more than just an enforcement agency. The NTA spoke about the tax professional community in regard to the backlog process of returns. They are trying to resolve all these delays right now. She is also working with the Return Preparer Office on getting certifications for tax professionals through faster. They welcome comments from the public for Public Service Announcements and problems (with solutions).

Tross wants Chairs and Vice Chairs to share the link to the TAP recruitment video with their committee members so they can share it with the public. Keep putting the message about TAP out to the public so get the word out about TAP.

Public Comments

None

Project Committee Review/Activities

Tax Forms and Publications

M. Lewis presented:

Issue 43731 Form 1310 – Statement of Person Claiming Refund Due to a Deceased Taxpayer

M. Lewis motioned; Rice seconded

Action: Issue elevated to IRS for consideration

Issue 43820 Schedule A – Itemized Deduction Donations

M. Lewis motioned; Buttonow seconded

Action: Issue elevated to IRS for consideration

Issue 43953 Publication 502 – Medical and Dental Expenses

M. Lewis motioned; Brock seconded

Action: Issue elevated to IRS for consideration

Issue 44396 Schedule LEP

M. Lewis motioned; Rice seconded

Action: Issue elevated to IRS for consideration

M. Lewis reported Issue 41760 Form 2210 F (**Rebuttal to be submitted**)

Issue 43449 2019 Form 1099 DIV

Issue 43805 PPP Loan Form Suggestion

Issue 43939 1040 Line 2A (in Parking Lot awaiting clarification from submitter)

Taxpayer Communications

Buttonow presented:

Issue 44227 Consolidation of the Fresno Submission Processing Center

Recommending postcard to taxpayers who may be affected by this closing. Recommending IRS send out timely press releases in June and October notifying the public of this change. There will be outreach completed about this subject in the near future.

Buttonow motioned; Brock seconded

Action: Issue elevated to IRS for consideration

Issue 40485 Tax Calendar (**Correct area being figured out**)
Issue 40148 Where's My Refund (**Rebuttal to be submitted**)
Issue 41883 Payoff Transcript (**Rebuttal to be submitted**)
Issue 43838 Third Party Authorization (**Rebuttal to be submitted**)

The committee agreed to online account feature issue, with many recommendations, will be rolled into one issue. Taxpayer and Tax Pro issue being worked.

Notices and Correspondence

Folta presented:

Issue 43843 LT 2645C

Folta motioned; Brock seconded

Action: Issue elevated to IRS for consideration

Toll Free Phone Lines

Rice reported working on a few issues that will be ready for the JC soon and 100 percent activity reports. Price was interviewed on Sunday April 18, 2021 by Jerome Graham, Host of *The Urban Beat Radio Show*. It was a 30-minute interview regarding TAP and recruitment.

Taxpayer Assistance Center Improvements

O'Sullivan reported. Charles Simineo brought Issue 44436 on tax issues. The recommendation is the scope of Volunteer Income Tax Assistance (VITA) be expanded to include some training or ability to include oil and gas royalties.

Issue 40462 Innocent Spouse was discussed in the committee, Lewis provided additional research. Tross will draft the rebuttal.

Issue 40902 Telephone Appointment response is due by the end of July as stated by Odom. Information from IRS to review for the VITA training program was received and shared with members to review. We have the spots to be filled, IRS will be reaching out to the members to set up the meetings.

Issue 44276 Review Tax Tips. Once subcommittee 2 receives information on this Issue they will review. O'Sullivan added IRS had a delay in responding and he will keep the subcommittee updated.

Special Projects

Brock reported 43867 ITIN certifications to be ready soon.

Issue 42690 Clarifying Instructions and which address to send stuff to.

Issue 43798 Setting up online accounts without US phone numbers.

Issue 43619 Tax Calculator is being worked.

Issue 43819 Banking information for direct deposit purposes for upcoming payments.

Another issue regarding the ability to get paper forms for people who can't print or have no computer. This crosses into elderly and poor taxpayer issues.

Internal Communications Committee

Scott reported

Issue 48806 improving the www.tapspace.org manual for users.

Issue 48807 Facebook Administration- screening new members.

Scott thanked everyone for working to get out the last newsletter both members and staff. News articles are due on April 25, 2021. Moretti asked the Chairs to solicit their committees for volunteers for the ICC and recommended members work with other committees.

Round Table

Buttonow inquired how we can present the strategic items section. Scott suggested a working group for this project. There was a discussion about the percentage of TAP referrals accepted by the IRS. The staff assured the committee that TAP has a high percentage as well as a huge impact on IRS policies.

Closing

English asked members to use their cameras for tomorrow's meeting. English closed the call at 2:58 ET closed.

Next Joint Committee Meeting May 27, 2021 at 1:30pm ET

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