

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
June 24, 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 (Absent)
- Robert “Bob” Moretti National TAP Chair
- Lacy Rice Jr. Chair, Toll-Free Phone Lines Committee
- Christine “Chris” Scott Chair, Internal Communications Committee
- Nina Tross National TAP Vice-Chair

Visiting Members

- Andrea Price Member, Toll-Free Phone Lines Committee

Staff

- Lisa Billups Program Analyst
- Kevin Brown Management Assistant
- 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
- Ramona Bailey Program Analyst Small Business/Self-Employed (SBSE)
- Tamikio Bohler Program Analyst W&I
- Cynthia “Cindy” Jones Supervisor Program Analyst W&I
- Michael Odom Program Analyst W&I

Members of The Public

Charles Huang

Welcome

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

Roll Call

Quorum was met for the meeting.

Approval of May 27, 2021 JC Meeting Minutes

There were several edits and corrections to the minutes. Folta motioned; Tross seconded

Action: Minutes approved as amended.

TAP Chair Report

Moretti reminded the committee that Kenneth Corbin, the speaker from the All TAP June 17, 2021 meeting indicated his willingness to come back and speak to TAP. Corbin reported the IRS still having a backlog to processing returns from the last few years and it mainly being an issue with their budget. Erin Collins also made comments about the IRS budget, which could help improve this issue. Moretti reminded the committee they could help with the current interviews going on and to include these hours on your Activity Report. In addition, Moretti reminded the committee chairs to please remind their members that they committed to making time for TAP responsibilities during their interviews.

TAP Vice Chair Report

Tross reported that shifts will be sent out soon for the Virtual Tax Forums. The IRS sent out a survey for us to take topics and group them into categories that make sense to you. This is most likely to help them organize their website better. Martinez will share this survey with the TAP, please complete this.

Public Comments

None

Project Committee Review/Activities

Notices and Correspondence

Folta presented: Issues 49524, 44237, 43944

Issue 49524 LT3541 and LT3541A- The referral ID 2043 containing “taxpayer ID” was removed from the referral. The ID 2051 and 2052 were removed from the referral because of its limiting language.

Folta motioned; Brock seconded.

Action: Issue elevated as amended to IRS for consideration

Issue 43944 LT 5071C - LT 4883C- The referral was cleaned up for clarity. Folta motioned; Rice seconded.

Action: Issue elevated as amended to IRS for consideration

Issue 44237 CP504 and CP504B Notice of Intent- Issue amended for clarity.

Folta motioned; Rice seconded.

Action: Issue elevated as amended to IRS for consideration

Folta reported the committee is currently working on an online account issue regarding forms going out to taxpayers.

Tax Forms and Publications

M. Lewis Presented:

Issue 48369 Schedule K Forms- Issue amended for clarity. Lewis motioned; Brock seconded.

Action: Issue elevated as amended to the IRS for consideration

Issue 48424 Initials (AMT) In the Instructions

Lewis motioned; Buttonow seconded; Rice abstained.

Action: Issue elevated as amended to the IRS for consideration

Lewis reported the IRS accepted three of the committee's issues which is pretty exciting. Great job for the IRS and for the committee to see the fruits of their labor.

Taxpayer Communications

Buttonow reported:

Issue 44227 Partner with VITA, SPEC & TCE for Communications on Fresno Submission Center Closing- Issue amended for clarity. Buttonow motioned; Lewis seconded.

Action: Issue elevated as amended to the IRS for consideration

Buttonow reported working on three new issues:

The committee is up to 30 features on online accounts and they are still working on them. We are already making progress on increasing online account issues right now.

Special Projects

Brock reported:

Issue 42690 was accepted by IRS. We have had good attendance, good activity reports and lively discussions. Brock encouraged the committee to create an online account to see how it works. We want these features available to overseas taxpayers.

Toll Free Phone Lines

Rice reported working with W&I on the Natural Language pilot on the Economic Impact Payment (EIP) lines, Issue 44245. They are working on Issue 44243 expansion of customer callback technology. Issue 43632 reposition foreign language prompts was accepted by the IRS and closed. The screening committee screened over 120 issues and the activity reports are going pretty well.

Taxpayer Assistance Center Improvements

O'Sullivan reported finding a Question and Answer (Q&A) concerning which stimulus payments are affected by the Treasury Offset Program. This has been posted on www.tapspace.org.

Tross added there is a new form for innocent spouse that is available to the public. English will forward this to the TAP.

Internal Communications Committee

Scott reported moving forward converting from Facebook Group to Page by October 1, 2021 deadline. We are welcoming any comments or suggestions on the www.TAPspace.org user

guide. Please go back to your committees to ensure the reports are submitted for the newsletter. Rice has offered to assist with changing to a Facebook Group. Scott reported trying to ensure this change is verified so it can be accepted as an official website for TAP.

Round Table

Rice said there is a need for better communications with the IRS to avoid TAP duplicating the efforts of other IRS units. Rosalia reminded Rice that many of these efforts from the IRS are because of TAP recommendations in the background. Martinez will continue making efforts to share active TAP issues with our IRS counterparts to prevent duplication by IRS and TAP.

Buttonow requested we attach previous versions of forms, we are making changes to, to show what the change is coming from.

TAP Managers Update

Smith reported that Tax Forms and Publications lost Sandy Villella.

Matherne reminded everyone that the ICC article is due tomorrow, the 25th.

DFO/National Office Update

English reported Kenneth Corbin was a treat to hear and we will work to get him back to speak to TAP again. Erin Collins, and Maryclaire Ramsey were also on the call so all members should make every effort they can to attend these meetings in the future.

The military focus group will be on July 15, 2021, at 3:00pm, but no invites have been sent out yet. English also reminded the members that we do not adhere strictly to Robert's Rules of Order for our meetings, but we do follow our own loose interpretations of these rules.

Action Items:

- May 27, 2021 minutes approved for posting.
- Issues 49524; 43944; 44237 elevated to IRS from Notices and Correspondence.
- Issues 48369 and 48424 elevated to IRS from Tax Forms & Publications.
- Issue 44227 elevated to IRS from Taxpayer Communications.

Closing

English thanked everyone on the call. Encouraged everyone to continue with outreach and closed the meeting at 2:59pm ET.

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

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