

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
July 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
- Robert "Bob" Moretti National TAP Chair
- Lacy Rice Chair, Toll-Free Phone Lines Committee
- Christine "Chris" Scott Chair, Internal Communications Committee
- Nina Tross National TAP Vice-Chair

Visiting Members

- Tor Daley Member, Tax Forms and Publications Committee
- Andrea Price Member, Toll-Free Phone Lines Committee
- Lucinda Weigel Member, Tax Forms and Publications 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
- Debra "Debbie" Awalt Program Analyst Wages and Investment (W&I)
- Ramona Bailey Program Analyst Small Business/Self-Employed (SBSE)
- Michael Odom Program 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 let the committee know their help with the interview process is greatly appreciated. The incite the panel provides is always welcomed with these interviews. English also thanked those members who participated in the military focus group last week. There will be a focus group in August for underserved homeless taxpayers. This is for anyone who has worked with the homeless through a shelter, a church, or in any capacity. Let your analyst know if you want to participate in this group.

The JC Planning Session will be on August 24-25, 2021, and the plans for this meeting are being finalized now.

TAP Managers Update

Jimerson from TAP West commented that the committees are working to complete as many projects as they can before the end of the year. The staff is working on completing tasks related to the interview process.

Jeans thanked the members helping with the tax forums despite the fact that there were connection issues. Please make the staff aware if you are still experiencing any technical issues. Jeans said one of their biggest issues will be related to the Child Tax Credit. The Outreach committee meeting was canceled due to participation on the Forums but will meet next month.

There will be a meeting for us to review a new IRS form, W4-P, that Fred Smith sent out solicitations for members to join. Add your name to the sign-up sheet if you wish to participate in this review process which gives an opportunity to provide feedback on the front end of a new form being developed by the IRS. Our committees are working on a number of projects trying to complete as many as we can before the TAP year ends.

Approval of June 24, 2021 JC Meeting Minutes

There were several edits and corrections to the minutes. Rice motioned; Brock seconded

Action: Minutes approved as amended.

TAP Chair Report

Moretti spoke about the review sessions Jeans reported on. You have until August 2, 2021 to sign up for one of the 45-minute sessions and these will occur between August 9-13, 2021. Moretti spoke more about the military focus group and the committee members who attended. There were eight in total and they did well. He is looking forward to more information about the upcoming focus group for the homeless.

The tax forums will run between July 20, 2021 through August 19, 2021. We did have problems logging into the forums, but the members are doing well. Moretti also spoke of the importance of the JC planning meeting.

TAP Vice Chair Report

Tross is looking for ideas or ways to improve outreach at the JC planning meeting. What are other opportunities for TAP members coming off the panel who want to continue volunteer services? These two items will be added to the JC Planning meeting agenda.

Public Comments

None

Project Committee Review/Activities

Tax Forms and Publications

M. Lewis thanked the two members from her committee joining the JC for the first time and welcomed them to add any corrections to her report as she gives it.

Issue 50487- Review Form 8857. Buttonow inquired how these changes affected the instructions. The request from the IRS was only to review the form and make any improvements for taxpayers to easily understand how to complete this form. Jeans said the IRS tends to change instructions at the same time they adjust forms, should the need arise for a change or update. The project statement was reworked for a better flow per Rice's suggestion. Lewis Motioned; Rice seconded.

Action: Issue elevated as amended to the IRS for consideration

Issue 48596- Form 1040SR, Line 38 "Estimated Tax Penalty"

Tross suggested looking at the new 1040 Draft Form because it might affect this referral since it is regarding what the IRS has already done to the form. Brock spoke about the instructions for general penalties and interest and line instructions that should be considered in the referral. Rice suggested updating the project statement, so it accurately reflects what this referral is seeking to do. The project statement remains as submitted because it is based on the wording of the taxpayer who submitted the issue. Lewis motioned; Buttonow seconded.

Action: Issue elevated as amended to the IRS for consideration

Issue 48840- Add Worksheet to Fillable Forms. This recommendation is only for fillable and not calculating. Goal statement amended slightly for better flow. Lewis motioned; Brock seconded.

Action: Issue elevated as amended to the IRS for consideration

Lewis reported the committee is currently working six issues and we are reviewing the IRS response to three issues.

Special Projects

Brock reported:

Issue 49525- Expanded Taxpayer Online Account with the IRS. Buttonow wanted to ensure that the approach for this referral was more strategic instead of tactical with the features we are

looking at so the Taxpayer Communications committee can bring a more tactical approach with their referrals to this project. The wording was changed slightly to flow better and sound more user-friendly. Brock motioned; Folta seconded.

Action: Issue elevated to IRS for consideration

Issue 44253- Increase the number of forms, publications, and instructions allowed to be ordered. There was a discussion about the possible cost and options around the issue this referral seeks to address. Small corrections and edits were made to the referral. Brock motioned; Lewis seconded.

Action: Issue elevated as amended to IRS for consideration

Brock reported her committee reviewing an IRS response to a rebuttal on Issue 42967 which will be reviewed at their next meeting.

Notices and Correspondence

Folta presented **Issue 49629** – CP161 Notice of unpaid taxes Review. Buttonow suggested adding a Quick Reference (QR) code to the form, which was accepted by Folta. Additionally, minor corrections were made to the wording in the referral. Folta motioned; Rice seconded.

Action: Issue elevated as amended to IRS for consideration

Folta reported working on two issues new number lookup and the online accounts having notices available for taxpayers to see in their online accounts for all notices.

Rice made a request to extend the time for this meeting.

Action: The committee decided by consensus to extend the meeting time to complete today's agenda.

Internal Communications Committee

Scott thanked everyone for the newsletter articles. Scott asked the chairs to remind members who are writing them to turn them in on time. Scott asked that we encourage members to go to www.tapspace.org for outreach. We just created the new Facebook page; it is being constructed. Contact Scott if you want to be an administrator.

Toll-Free Phone Lines

Rice reported:

- Issue 44245 Natural Language Pilot on the EIP line- Completed
- Issue 44243 Expansion of customer Callback application- Completed
- Issue 42231 IRS telephone numbers in 1040 Instructions-Closed
- The committee had 100 percent of activity reports turned in this month.

Taxpayer Communications

Buttonow reported:

- They should have 5 issues ready for next month's JC meeting.
- There should be about 31 recommendations on the online account referral.

- These will be related to the Strategic initiative for IRS to the adoption and development accelerate online accounts for taxpayers and tax professionals.
- We will communicate out the IRS Saturday open house for Advance child tax credit via social media for education to taxpayers.

Taxpayer Assistance Center Improvements

Lillie reported working on:

Issue 44274 Volunteer Income Tax Assistance (VITA) project review.

Issue 44426 Oil and Gas Royalties.

Issue 44276 Review of information provided at TAC centers.

Issue 40919 No Appointment Available at FL TAC

Issue 41122 Accessibility to Taxpayer Advocate Service

Issue 41475 Distance of Citizen Travel to IRS office

Round Table

Rice inquired about the change suggested to the Issue 48840 goal statement. Martinez made the change. Moretti suggested Buttonow add his committee's online account issue to www.tapspace.org for the entire TAP to review. Lillie suggested members attend the nationwide tax forums which have focus groups that would be a perfect opportunity for TAP members to do outreach. This information should be shared with the TAP.

Action Items:

- June 24, 2021 minutes approved for posting.
- Issues 50487, 48596, 48840 elevated to IRS from Tax Forms & Publications.
- Issues 49525 and 44253 elevated to IRS from Special Projects.
- Issue 49629 elevated from Notices & Correspondence.

Closing

English thanked everyone for a great meeting. English closed the meeting at 3:05pm ET.

Next Joint Committee Meeting August 26, 2021 at 1:30pm ET

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