

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
June 23, 2022**

Designated Federal Official (DFO)

- Terrie English TAP Director

Members Present

- Laurie Brock Chair, Special Projects Committee (Absent)
- Charles Jones Chair, Notices and Correspondence Committee
- Martha Lewis National TAP Chair
- Eugene “Gene” Lillie National TAP Vice-Chair
- Angela Madison Chair, Internal Communications Committee
- Donna Patterson Vice-Chair, Special Projects Committee
- Richard “Rick” Rodriguez Chair, Toll-Free Phone Lines Committee
- Victoria Ramirez Vice-Chair, Taxpayer Communications Committee
- Christine “Chris” Scott Chair, Tax Forms and Publications Committee (Absent)
- Patricia “Pat” Thompson Vice-Chair, Tax Forms and Publications Committee
- Nina Tross Chair, Taxpayer Assistance Centers Committee
- Leigh Ann Wood Chair, Taxpayer Communications Committee (Absent)

Visiting Members

- Rebecca Lammers Member, Special Projects Committee
- Kristen Gentile-White Member, Notices and Correspondence Committee

Staff

- Kevin Brown TAP Management Assistant
- Conchata Holloway TAP Program Analyst
- Cedric Jeans TAP East Chief
- Rosalind Matherne TAP Program Analyst
- Gilbert Martinez TAP Program Analyst
- Robert Rosalia TAP Program Analyst
- Antoinette “Toni” Ross TAP Program Analyst
- Fred Smith Program Analyst
- Ramona Bailey Program Analyst Small Business/Self-Employed
- Elaine Christophe Tax Analyst Wage and Investments (W&I) Customer Assistance
Relationship and Education (CARE)
- Michael Odom Program Analyst W&I
- Johnetta Royster Tax Analyst W&I CARE
- Schenita Thornton Program Analyst W&I CARE
- Aphillia Hughes Program Analyst W&I

Roll Call

Quorum was met for the meeting.

Members of The Public

None

Welcome

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

DFO/National Office Update

English reported the staff is still working on members being able to regain access to www.tapspace.org. English reminded the committee that the National Taxpayer Advocate (NTA) released the June Report to Congress on June 22, 2022. The committee was encouraged to review this with the focus on the Most Serious Problems to see if they are in line with some issues TAP is addressing. One area of focus was if the public is having issues with taxpayer appeals, as this is an important issue for the NTA. English encouraged the committee to be mindful and bring any issues of this nature for TAP to work on.

The JC will have an in-person face-to-face meeting this year from August 8-11, 2022. Please let us know if you are unable to attend. Your Vice-Chair should replace you if you are unable to attend. The administrative staff will work with you on your travel plans for this meeting.

Outreach must be approved ahead of time. We are keeping track of our spending budget for the year. Mileage and parking are part of the travel and can be reimbursed for outreach events.

TAP Managers Update

O'Sullivan reported the mentorship program being wrapped up with input from all participants on how to improve this program for next year. Please share any additional suggestions with Rosalind Matherne. O'Sullivan thanked Matherne for her leadership with this program.

Jeans deferred to Ross for Tax Forums. Ross reported already having 19 volunteers and noted that we are looking for more support for the forums. Ross indicated a sign-up sheet will be sent on June 29, 2022, to capture the participant's availability for these forums. In addition, there will be training after the list of members is received.

Smith reported that we are in the process of receiving applicant information at this time. We will be looking for volunteers for interview panels. An email will go out for the interviews, which will take place in July. Smith asked members to please respond to the email as soon as it comes out for those who would like to be a part of this process.

Approval of May 2022 JC Meeting Minutes

There were minor edits and corrections made to the minutes. Tross motioned; Rodriguez seconded.

Action: Minutes approved as amended.

TAP Chair Report

Lewis thanked everyone for joining the meeting. Lewis reported visiting committee calls to observe how the work is being done and noted the improvement is amazing from the beginning of the year to now. Keep doing a good job. Lewis reminded the committee to plan accordingly for the upcoming planning session, so your vice-chair or a member can represent your committee to make this a successful planning session.

Lewis reminded the committee we still need more volunteers for the tax forums. Lewis also encouraged the committee to keep doing outreach and to complete their activity records.

Vice Chair Report

Lillie reported many members are going out to do in-person outreach events. Lillie requested that members take pictures to show the public that we are around for the public and the members. Lillie reminded the committee of the Latino Tax Professional Association next month in Las Vegas, Nevada. The Commissioner, as well as the NTA, are scheduled to attend this event. If you are in the area, please join this event. Lillie encouraged the committee to keep the good work coming.

Public Comments

None

Project Committee Review/Activities

Special Projects

Patterson reported:

Issue 51241- Form 1040-SS and 1040-PR

Bona fide residents of all territories use these forms to report self-employment income, calculate self-employment tax, and evaluate eligibility for some refundable credits. This referral seeks to make completing this form easier by making the forms fillable, having clear instructions in multiple languages, thus allowing taxpayers to gain access to the Child Tax Credit. Patterson motioned; Rodriguez seconded.

Action: Issue elevated to IRS for consideration

Issue 51693- Estimated Tax Payments

This referral seeks to allow taxpayers to make estimated tax payments and have them properly credited under their own social security number (SSN) and not their spouse's SSN.

Patterson motioned; Tross seconded.

Action: Issue elevated to IRS for consideration

Patterson indicated that the committee is rebutting the response to Issue 49525 as the committee feels that transaction codes and a link to the pocket guides are important to taxpayers. There were two additional issues on international phone calls, and Identity Protection Personal Identification Number (IP PIN) challenges that the committee is currently working.

The committee is working on an issue allowing the refunds to be split between the taxpayers. The IRS response to Issue 50545 may be rebutted.

Tax Forms and Publications

Thompson reported:

Referral Issue: 52617- Form 8812, Credits for Qualifying Children and Other Dependents

This referral seeks clarification to make it easier for taxpayers to understand and complete this form. Thompson motioned; Tross seconded.

Action: Issue elevated to IRS for consideration

Thompson reported the committee is working on:

1. W4 employee holding certificate.
2. Issue 52476 to make employees complete the form 1099C properly.
3. To review the form 1040 instructions.

Taxpayer Assistance Center Improvements

Tross offered assistance in reviewing the 1040 instructions if the committee needs it.

Tross reported 5 issues being worked on:

1. Oil and Gas for Volunteer Income Tax Assistance (VITA) sites.
2. Online transcripts.
3. Accessibility to TAC center.
4. TAC tips in the TACs.
5. Signage in the center with restrictions on cell phone usage in TACs.

Tross reported being up to date with the screening of issues. Tross also indicated everyone is being encouraged to be diligent in completing their activity records online and to keep doing outreach.

Taxpayer Communications

Holloway reported:

Issue 36435- Closed to focus on reasonable clause concerns.

Issue 40485- Closed to see if there is an online account feature to replace the tax calendar.

Issue 54248- Maximizing outreach for benefits is currently being worked on. This affects a lot of taxpayers from many demographics. The committee may be reaching out for assistance with this issue.

The committee is working on an issue with ID.me and encouraging members to please share any issues related to this topic.

Notices and Correspondence

Jones reported the committee has three rebuttals they are currently working on:

Issue 48460- Legitimacy of phone numbers. One proposal is for a reverse look-up to verify the phone numbers on these forms. We are also asking for a link to be able to look numbers up from the forms. The committee also asked that a link be provided with certain verbiage.

Issue 51423 Cp 504, 504b- The request was for a direct number to be added to these forms to reduce calls to the general phone number, but the IRS did not respond favorably.

Jones indicated the committee is working on four new projects involving installment agreements:

Issue 53485 - Installment Agreement Explained.

Issue 57391 - The Direct Deposit Installment Agreement Letter.

Issue 53484 - Balance Due Interest Due Form.

Issue 58801 - Reinstatement of Installment Agreement.

Jones spoke about taxpayers accessing their online accounts to be aware of whether the IRS has received and started processing mail sent by the taxpayer. Lewis recommended all TAP members set up an online account. The experience can inform members about the process and help them understand what other taxpayers deal with.

Toll-Free Phone Lines

Rodriguez referenced Issue 51693 regarding cross-communication between the TAP committees to both boost referrals and avoid duplicating each other's efforts. We are hoping that www.tapspace.org can be used to achieve this goal. WIFI calls might be a way to address Issue 51693.

Issue 50367 - 4883C Letter Verification over the phone - This issue is addressing taxpayers being told to call and the calls not being answered. The committee is still working this issue.

The committee is also working on the certified acceptance agent program. This program can help taxpayers who are either in custody or otherwise unable to produce documentation or remain on phone calls for extended periods of time. This issue is still being worked.

Issue 55354 - Voice Bot project was completed, and it needs work after the initial testing that the committee completed.

Lewis recommended the newsletter to get some cross-communication going to address the first concern. Other members communicated with Rodriguez via the chat feature.

Internal Communications Committee

Madison reported the ICC just completed the review of chapter seven of the handbook, and the changes they have offered were to update screens shots of how to create and join the www.tapspace.org site. This will put us in line with the new website.

The committee has created a template for the newsletter, so the content is consistent and easy to follow. Chapter eight for the handbook will be reviewed next. O'Sullivan reminded the committee that newsletter articles are due this month on Monday, June 27, 2022. Lewis asked for members who are editors to join the ICC.

Action Items:

- May 2022, minutes approved for posting.
- Issues 51241, 51693, and 52617 elevated.

Round Table

Martinez reminded the committee that the JC planning meetings will be held during some of the regularly scheduled committee meetings. Because of this, the Vice-Chairs should be running the meetings.

Patterson attended an outreach event and suggested that we review the outreach toolkit. Jeans indicated these documents are meant to be tailored to an individual's outreach needs.

Odom reported following up on several TAP referrals, open requests, and Subject Matter Expert requests from W&I. These should be addressed very soon for TAP. Patterson asked for an update on some of the TAP referrals that are pending IRS responses. Odom will work on this request and respond back to TAP with an update.

Closing

English indicated this was a productive meeting and will follow up on the rebuttals that we are doing. English indicated there will be training on travel going forward to make sure members are fully aware of how to proceed. English reminded the committee that Vice-chairs should run the meetings and JC members can step away from the planning session if they need to join these meetings. Let us know if there are any special needs for travel. English closed the meeting at 2:35pm ET.

Next Joint Committee Meeting July 28, 2022, at 1:30pm

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