



**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
April 25, 2019**

Designated Federal Official (DFO)

- Terrie English TAP Director

JC Members Present

- Heidi Hirschfeld National TAP Chair
- Patrick Kusiak TAP Vice Chair
- Cheryl Williams Chair, Special Projects Committee
- Philip Kleiber Chair, Toll-Free Phone Line Committee
- Bruce Stratton Chair, Tax Forms and Publications Committee
- Patricia Anthony Chair, Taxpayer Communications Committee (Absent)
- Jeri Hunter Chair, Notices and Correspondence (Absent)
- Kathryn Tracy Chair, Taxpayer Assistant Centers Committee (TAC)
- Alice Azzaro Chair Internal Communications Committee

Other TAP Members Present

- Victor Frausto Vice-Chair, Notices Correspondence Committee
- Robert Moretti Vice-Chair, Special Projects Committee

Staff Present

- Lisa Billups Senior Program Analyst
- Cedric Jeans TAP East Chief
- Fred Smith Program Analyst
- Gilbert Martinez Program Analyst
- Matthew O'Sullivan Program Analyst
- Robert Rosalia Program Analyst
- Rosalind Matherne Program Analyst
- Antoinette Ross Program Analyst
- Conchata Holloway Program Analyst

Staff Absent

- Susan Jimerson TAP West Chief
- Kevin Brown Management Assistant

Members of The Public

- Kathy Hughes, Treasury Inspector General for Tax Administration (TIGTA)
- Paula Johnson, TIGTA
- Russell Martin, TIGTA
- Ann Ring, TIGTA



- Donna Tuke
- Allyson Versprille, Bloomberg Tax
- Paul Merrion, MLex US Tax Watch

Welcome

Hirschfeld the new Chair of the TAP; she welcomed all to the first meeting and proceeded with the agenda.

Roll Call

Quorum was met for this meeting.

DFO/National Office Update

English welcomed all and stated the following:

- During the teleconferences, members are asked to keep their phones on mute when they are not speaking.
- On Tuesday, April 30, 2019, there will be a TAP member administrative meeting; this will be a training for all Chairs of committees.
- The face to face survey sent to members for feedback has ended.
- Business cards have been ordered and will be available for members in a few weeks.
- Members are asked to consider volunteering for the Tax Forums that are held in their home states. Approval will be considered if members are in the same state.
- Recruitment for new members are opened until May 3, 2019.
- TAP staff is collecting data for outreach repository database; this information is collected from the Outreach Monthly Report submitted by members of each committee.

Jeans stated the following:

- There will be additional screening calls for the committees.
- Members should contact Brown, Babb or Gold for marketing materials.
- Use the generic business cards until the personal business cards are available.

TAP Manager Updates

O'Sullivan reported for Jimerson he stated the following:

- Conchata Holloway is on a detail to TAP West for the next 120 days
- The 2018 TAP Annual report has been submitted to the Graphics Department.

Approval of Minutes

The minutes for November were approved for posting to www.improveirs.org.

Monthly meeting date and time

The committee agreed to move the monthly meeting from 1:00 p.m. - 2:30 p.m. ET to 1:30 p.m. to 3:00 p.m. ET effective the next monthly meeting, May 30, 2019.

TAP Chair Report

Hirschfeld provided a brief overview of her background in computer graphics design. She mentioned that the new change enhancements that TAP will be working on for www.TAPSpace.org and www.improveirs.org. If members have any suggestions or comments, they should send to Jeans.

TAP Vice Chair Report

Kusiak mentioned his first Outreach Meeting last week. He mentioned that his committee plans to enhance the outreach efforts. They are working on exploring the creation of an outreach calendar to compile on a regular reoccurring basis. This can be archived, and new members will have resources to distribute to committee members.

Public Comments

None.

Internal Communications Committee Chair – Azzaro

Azzaro stated that her committee had their first meeting on April 16, 2019; the committee voted on the Chair and Vice Chair positions. The committee also established the monthly meeting dates and discussed social media guide.

Chairs were asked to send their news article by the twenty-fifth day of each month to incorporate into the monthly newsletter. Azzaro asked if members need help, feel free to reach out to her and the committee.

Notices and Correspondence Chair – Hunter

Frausto reported for Hunter who was absent. He stated that on April 10, 2019, his committee had a great meeting.

Subcommittee 1

Issue 38499-Non-Profit Notices

Subcommittee 1 convened and researched and worked on Issue 38599 and after receiving information regarding this issue from IRS Liaison Bohler the committee decided to drop it.

Issue 38457-Line 60b Form 1040 and Form 5405

The comment regarding this issue was the submitter was wondering why they had to fill out Form 5405 (First Time Homebuyers). This issue is still being researched.



Subcommittee 2

Issue 38667-CP 90 Notice

The goal statement is to improve clarity of the CP 90 Notice to make it easier for taxpayers to understand what their options are if they cannot pay their taxes.

Subcommittee 2 members started on their Project Referral Form for Issue 38667. Questions were sent to Mikio Bohler on April 3, 2019. The NCC received answers on April 22, 2019 and will be discussed further at the next subcommittee-2 meeting.

NCC received IRS Responses for:

Issue 37335-CP10 Math Errors	Issue 38436-CP13 Math Errors
Issue 38434-CP11 Math Errors	Issue 38437-CP16 Math Errors
Issue 38435-CP12 Math Errors	

Subcommittee 2 will be reviewing these responses at their next full committee meeting set for Wednesday, May 8, 2019.

Both subcommittees will be reviewing CP Notices for the Office of Taxpayer Correspondence (OTC). The OTC sent over several notices for review and to ensure that NCC understands what they are reviewing. There was an OTC presentation with the Subject Matter Expert (SME) on April 23, 2019 for both subcommittees.

Tax Forms and Publications Chair – Stratton

Stratton briefly discussed the following issues and the full committee agreed to elevate the 5 issues to the IRS; some issues need some minor tweaks:

- Issue#39941- Sched. C (Form 1040) Profit or Loss from Bus. and Instructions.
- Issue#39926- Form Sched. 8812 (Form 1040) Additional Child Tax Credit and Instructions.
- Issue 40132-1040 NR-EZ Instructions - U.S. Income Tax Return for certain Nonresident Aliens with No Dependents.
- Issue 40159-: 1040 NR-EZ Instructions - U.S. Income Tax Return for certain Nonresident Aliens with no dependents
- Issue#40358 - Form 5471, Information Return of U.S. Persons with respect to certain foreign corporations and instructions.

Taxpayer Assistance Center Improvements Chair – Tracy

Tracy stated that her committee is visiting TAC locations as “secret shoppers” on behalf of the taxpayers. There are good and bad things that they have seen however, they are working on making the TAC more accommodating to the taxpayer’s needs. Tracy also mentioned that there should be a google map added to find the TAC locations.

VITA/TCE Improvements are looking for members to participate- volunteers will work on Publications: 4491, 6744 and 4012. This will be a time commitment for those who want to volunteer. If interested, Tamikio Bohler will be contacted by TAP analyst with the list of those interested.

Toll Free Committee Chair - Kleiber

Kleiber mentioned that the Face to Face meeting in Albuquerque, NM on March 21, 2019 was a great meeting. He stated the following:

His committee received feedback from Debra Awalt from Wage and Investment on Issue# 40124 Call Back feature. The issue to be considered is that taxpayers should be given the opportunity to input a telephone number to receive a call back if they have been on hold for longer than 15 minutes.

Another subcommittee is working with the IRS to ascertain why they do not publish additional IRS toll free numbers to enable taxpayers to reach them. In addition, there are no toll-free numbers for international callers to reach the IRS. IRS should offer taxpayers a chance to provide feedback of their interactions. Expand voice messages on low volume lines added to 800 lines.

Special Projects Committee Chair - Williams

Williams mentioned that her subcommittees are working on the following:

Issue # 36969 – Guidance is not clear.

Issue# 36775- Power Attorney and E Services- Williams spoke to Awalt and this issue will be transferred to the Taxpayer Communications Committee.

Issue# 36671 EIN Request have not yet identified who this issue effects however, Williams will request a SME to get some guidance.

Taxpayer Communications Chair - Anthony

Anthony mentioned that her committee members have some questions regarding Online Authorization for Tamiko Bohler to provide clarification. Anthony stated that subcommittee-2 is putting together a survey and will vote on the webpage before it will be shared with the public. This survey is for CPAs and Tax Practitioners to provide feedback on Online Authorizations. A date for the survey will be set to share at future outreach events.

Round Table

No additional comments from members, staff or public participants.

Action Items:

- Send emails with what you want to see done to improve TAPSpace and www.improveirs.org. to Jeans.
- TAP newsletter contributions are due on the twenty-fifth day of each month.
- TAP Administrative call for Chair training teleconference is scheduled for April 30, 2019 @ 2:00-3:00 p.m. ET.

Closing

The next Joint Committee meeting is May 30, 2019 @ 1:30 - 3:00 p.m. ET.

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