

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
August 13, 2019**

Designated Federal Official (DFO)

- Terrie English TAP Director

Members Present

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

Staff Present

- Sheila Andrews Deputy Executive Director, Communications, Stakeholder Liaison and Online Services (CSO)
- Maryclaire Ramsey Executive Director
- Cedric Jeans TAP East Chief
- Susan Jimerson TAP West Chief
- Matthew O'Sullivan Program Analyst
- Carolyn Duckworth Program Analyst

Members of The Public

None

Roll Call

Quorum was met for the meeting.

Welcome/Official Opening

English opened the meeting and addressed any problems or concerns the members had regarding travel and scheduling to attend this meeting. Andrews mentioned that many of the concerns were budget related and there is not much TAP can do about that but that she would look into trying to see if there was anything she could do to help make the experience better. She also thanked the members for their contributions to the TAP program. English then had the attendees introduce themselves prior to turning the meeting over to Hirschfeld to open the meeting and immediately turned it over to Ramsey.

Welcome/Announcements/Comments/Acknowledgments of Citizens/Review of Agenda

Hirschfeld welcomed everyone and reviewed the agenda. There were no members of the public at the meeting.

DFO/National Office Updates

Ramsey reported that Nina Olsen retired on July 31, 2019, and that she is still in touch with her via email. She also informed the members that a replacement has not yet been selected and that the Commissioner makes the final decision. She informed the members that Bridgett Roberts is currently acting for Olsen until a new National Taxpayer Advocate (NTA) is selected and then introduced Roberts who called in to the meeting.

Taxpayer Advocate Service Updates

Bridget Roberts thanked the members for their service to TAP and apologized that she was not physically present at the meeting. She further thanked them for attending the tax forums and getting the word out and sharing information about TAP and gave a special “thank you” to the Toll-Free committee for working so hard to improve the customer callback process. Roberts also addressed the overwhelming caseload of Case Advocates and explained that they are currently in the hiring process to bring additional Case Advocates on board. They are also working with the IRS to try and get them to do their job to prevent Taxpayer Advocate Services (TAS) from having to do the extra work. Roberts stated that her primary focus during this tenure is the Case Advocate hiring.

Roberts and Ramsey also addressed the following comments/concerns of the members:

- Kleiber: There is a lot of frustration out there from tax professionals
- Azzaro to Roberts: What will be your highest priority during your tenure?
- Kusiak: Will the two-year budget Congress is implementing assist with hiring?

Ramsey also reported that the “Taxpayer First Act” went from 20 issues to 10 Most Serious Problems. She will be leaving the meeting and heading to New Orleans to work on the Annual Report. The projected date for release is the second week of January 2020. The report is typically over 1,000 pages and she explained the many hands that touch the report before it is finalized. Ramsey mentioned that they conduct various studies prior to writing the report and that she is particularly proud of the study they are currently doing on the “underserved” community and thanked the panel again for the grassroots work they do with bringing issues back to the TAP.

Ramsey mentioned that she is also proud of the work they have done on the “Roadmap” which outlines the steps that a taxpayer’s return goes through from beginning to end. She brought a copy of the map to meeting and shared it with the attendees. She also explained that the map is currently available on the IRS website and gave the publication number (Publication 5341).

TAP Chair Report

Hirschfeld told the members to be careful about the information they are sharing on social media in the form of surveys, etc. and suggested that they have the Joint Committee review their information prior to them sharing it. She stressed that it is important that they do not send the wrong message or violate any confidentiality rules. English echoed this. Jeans reminded the members that reporters could be on the full committee calls and that members should always be mindful of this during their meetings.

Azzaro asked if the newsletter could be posted to www.Improveirs.org and Andrews advised her to discuss this with her DFO.

Kleiber told members to be cognizant of reviewing material listed as “classified” or “internal use only” and be careful not to share that with the public as these are for committee members use and awareness.

TAP Vice Chair Report

Kusiak reported that activity reports are being more “robust” and that those members reporting zero hours need to be addressed. Kusiak feels the committees have been doing a really good job overall and suggested that, when Local Taxpayer Advocates (LTAs) are doing presentations at the tax forms and other venues, they include TAP during their presentations. He attended an outreach event with the DC LTA where he explained the role of TAP during their joint presentation at the event and is looking to include TAP information in the tax forum registration packages. Kusiak is also looking for opportunities for TAP to give the short “elevator speech” during these presentations.

A discussion took place among at the meeting where the members feel that they should get more recognition at the TAS presentations since TAS has become more “frontline”. They feel TAS should mention TAP during their presentations and perhaps include us in their power point presentations to give TAP more visibility.

Taxpayer Assistance Center Improvements

Tracy reported that the committee was assigned by the IRS to work on updating Volunteer Income Tax Assistance (VITA) test products. The projects have been completed and the new text has been sent to the publisher. Issue 40698 concerning Health Savings Accounts (HAS) has been elevated to the IRS. Tracy stated that the IRS considers this a specialized issue and the committee suggested that it be included in the advanced training. Tracy also reported that the committee is working on a referral for issue 40699 where they are requesting that the IRS provide a document with a link which explains the various payment options for taxpayers who owe taxes.

Tracy reported that the committee is also working on an issue where taxpayers can get a direct link to a Google map for directions to TAC offices in various areas and a final issue where taxpayers who have appointments scheduled with the TAC office will receive confirmation email reminders of that appointment.

Toll-Free Lines

Kleiber reported they are making progress on the customer call back referral from 2018. The referral asks for additional toll-free numbers for specific issues to be listed on www.IRS.gov. The committee received a negative response last week and will be issuing a rebuttal. Referrals were also sent for improving service to international taxpayers as well as a referral to ask for a caller option to answer questions from a customer satisfaction survey at the beginning of each call. Kleiber also stated that the committee is working on a Public Service Announcement informing taxpayers about www.Improveirs.org. The committee is also working on adding a Public Service Announcement on the practitioner line concerning Form 2848 issues and they have also been working on conducting outreach with their LTAs.

Notice and Correspondence

Frausto reported that the committee submitted five referrals on math error notices and that the IRS accepted most of them. Some items needed clarification. The committee dropped the nonprofit notices after they discovered the problem was not systemic. They were asked by the IRS to review a few notices and they also reviewed some Federal Payment Levy Program (FPLP) notices and are close to submitting those to the Joint Committee. Frausto also reported that they

are working on revising the CP2000 notices as it relates to charitable donations and pension accounts; and that Jeri Hunt accepted an LTA position which caused her to leave the committee.

Special Projects

Williams reported that the committee is working on the filing threshold for international taxpayers and a request to have a TAP member in the Virgin Islands because commonwealths and territories have different rules. They are also working on listing the complete social security number on check endorsements and the use of the Identity Protection PINs (IP-PIN) for ID Theft cases being mandatory. Williams also reported that the committee is working on having international taxpayers opting out of the direct deposit requirements and seeking to have interest and penalty charges computed on the return processing dates versus the actual received date of the return.

Tax Forms and Publications

Stratton reported that they currently have 14 issues awaiting responses from the IRS and six issues that will be elevated to the Joint Committee this month. The committee is working on simplifying instructions to the Form 2210 as well as issues involving the Forms 1040, 1040SR, and 1099 instructions.

Internal Communications

Azzaro mentioned that her goal is to establish an avenue through social media. She mentioned that they have hit some obstacles but hopes that by the end of November they can have something accomplished.

Taxpayer Communications

Anthony reported that Subcommittee 2 is on target with preparing a referral that they should have ready by October 1, 2019. They are going to have to restructure some things with Subcommittee 1 and, (as a result), are having two full committee meetings in September in an effort to get things accomplished. The notice will be sent to the Federal Register for the second meeting to be held on September 17, 2019.

Outreach Strategy

Kusiak reminded the committee that outreach is an important part of the TAP program and must be continually fed. He re-emphasized the importance of using social media and partnering with your local LTAs as suggestions for getting the word out.

Ramsey echoed Kusiak's words about continuing to feed social media. Azzaro mentioned that the committee has been doing just that and that there is a representative from each area.

Ramsey and Andrews threw out several suggestions on how the committee can utilize social media and gave guidelines surrounding its use. Ramsey mentioned that Instagram is the newest, safest platform for social media and that members should consider successor members when establishing and posting to a page. Andrews stated that members can set their own guidelines for establishing, reporting, and posting to a page and that TAP staff cannot be an administrator of any social sites. Jimerson suggested that these sites be used both to inform and educate the public.

Jeans suggested that members keep a record of their sources so that when they retire from the position that information can be forwarded and shared with TAP. He plans to request that information from members prior to their leaving.

Before leaving Ramsey committed to reaching back out to the members regarding questions they had about the website and the roadmap.

Chair and Vice-Chair Responsibilities

Jimerson and Jeans displayed a power point and led a discussion on the responsibilities of committee Chairs and Vice-Chairs. Jimerson opened it up to the members to talk about any concerns they have had regarding working with their committees. Azzaro just wants them to “show up”.

Jimerson suggested they keep new members engaged and use the mentoring process to help them along and get them acclimated with the TAP process. Jeans suggested that they look at www.TAPSpace to see skills the members have and give them something to do that utilizes those skills as a way to keep them interested. Jeans also suggested that the Chairs/Vice-Chairs attend different subcommittee calls to observe the various styles and possibly collaborate on assignments. Both Jeans and Jimerson thanked the attendees for the work they do and advised them not to take it all on themselves; involve others and delegate.

Chair Election Planning

O’Sullivan covered several events that the Joint Committee needed to go over and to vote on; including the relevant dates:

- Set a date for members to hold the initial informational Meeting – September 19, 2019
- Nomination process. Nominate yourself or another member – September 27, 2019
- Decide if they will accept the nominations – October 4, 2019
- Post to www.TAPSpace – October 10, 2019
- Meet the candidates session – October 17, 2019
- Ballots to be sent out – October 17, 2019
- Date for ballots to be received – October 25, 2019
- Notification of results – November 1, 2019

O’Sullivan mentioned that anyone who has completed their first year in TAP is eligible to run for Chair or Vice-Chair. He further stated that if you want to run and cannot attend the meet the candidates meeting, you should send your information to the Joint Committee analyst and copy Anthony.

Activity Reports Analysis

Jeans displayed activity reports on the overhead and pointed out areas of concern that members should look for when reviewing these reports. He also gave different scenarios and explained the different categories they should be reported in on the report. Jeans also demonstrated the proper way to report hours on the activity report and stated that members should have at least four hours of activity listed each month if they are attending the meetings. He urged members to ensure that they are reporting hours correctly and that final reports should be sent to Kudiratu (Kudi) Usman-Olugunna.

Elevated Referrals

Hirschfeld mentioned that referrals should go to her for approval. Jimerson suggested that at least a draft of the referral be completed and submitted by the end of September. O’Sullivan displayed a template of a referral and covered each section to show the committee how to



complete one correctly. He also included a hardcopy of the template in each of the folders for the members to use as a guide. O'Sullivan explained the entire process that a referral goes through once it is submitted including loading it on Systemic Advocacy Management System (SAMS).

Action Items

O'Sullivan reviewed the action items and Duckworth assisted.

Close Meeting

English closed the meeting

**Next Joint Committee Meeting is on Wednesday August 14, 2019
1:30 p.m. ET; 12:30 p.m. CT; 11:30 a.m. MT; 10:30 a.m. PT**