

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
August 14, 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

- Cedric Jeans TAP East Chief
- Susan Jimerson TAP West Chief
- Matthew O'Sullivan Program Analyst
- Carolyn Duckworth Program Analyst
- Tamikio Bohler Program Analyst Wage & Investments (W&I)
- Caroline Ware Local Taxpayer Advocate (LTA) Phoenix
- Mark Hutchens Program Manager Systemic Advocacy (SA)
- Frank Brusto

Members of The Public

N/A

Roll Call/Attendance

Quorum was met for the meeting.

Welcome/Official Opening

English opened the meeting and immediately turned it over to Kevin Brown for the roll call. English asked for pluses and deltas from the August 13, 2019, meeting and O'Sullivan recapped the highlights. The committee shared their various concerns about the when's, where's, and how's of the meeting and both English and Jeans addressed each of those concerns and explained that the primary purpose of this meeting is to plan for the next TAP year.

Tracy brought up an issue she is having with opening Word or Google documents via Apple devices which Kevin Brown addressed and explained that there is an ongoing issue between Apple and Google as the reason she is unable to open documents. Tracy then read the agenda and turned the meeting over to English.

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

Ice Breaker

English led an ice breaker exercise where the members and staff learned the various characteristics that go along with a particular personality style which everyone enjoyed.

Systemic Advocacy Update

Mark Hutchens discussed the two-minute rule for tax practitioners to be placed on hold and solicited feedback from the tax practitioner members regarding any issues they may have had. He also educated the committee members on the role and duties of Systemic Advocacy. Hutchens advised the committee to reach out to Tamara Borland or Joceline Champagne, (through their TAP analyst), if they have particular concerns that need to be addressed by Systemic Advocacy. Hutchens also informed the members that there will be a summit next month that the committee members may want to attend. Susan Jimerson will get more information about that and send that information out to the members.

Wage and Investment Liaison Update

Tamiko Bohler introduced herself and explained what happens with referrals after she receives them from the committees and that there is a 60-day response time from the IRS. Bohler stated that Sheila Stevens and Debra Awalt are Subject Matter Experts (SMEs) that analysts can reach out to as contacts and that Gary Lindsey is her back-up. Bohler also sent additional resources that the members can use which O'Sullivan displayed for her on the overhead for the attendees to see.

Bohler addressed a concern that Kusiak had about the number of "under consideration" responses they have received from the IRS this year on submitted referrals. Bohler advised the committee that these responses should have follow up dates and if not she would do some research to find out why this process is not being followed. The committee added that that would be helpful.

Jimerson suggested that it would also be helpful if these responses included a "reason" the issue is still under consideration so the members would know why the extension is needed.

2020 Project Proposal

The afternoon session began with Jimerson leading the 2020 Project Proposal where the Chairs and Vice-Chairs broke up into two groups, (TAP East and TAP West), to review their individual reports and determine what issue(s) they want to work on as projects for the 2020 TAP year. The report outs per committee were as follows:

Taxpayer Communications: Anthony reported that the IRS does not aspire to meet the needs of the military and she felt that would be a good issue for her committee to work on

Special Projects: Williams selected an issue involving International quality access relative to Toll-Free for her committee. She wants to look into a comparison between regular access versus international access.

Taxpayer Assistance Centers: Tracy selected 6 possible issues (1) their ongoing issue with Stakeholder Partnerships, Education & Communication (SPEC) to continue the Volunteer Income Tax Assistance (VITA) reviews; (2) how to accommodate taxpayers without appointments; (3) follow up with taxpayers who make telephone appointments to ensure they receive follow-up. email confirmations; (4) investigate if centers have “down days” to accommodate walk-ins; and (5) a means for taxpayers to leave reviews via Google or some other method.

Internal Communications: Azzaro reported that the committee is still working on setting up a social media library so others can feed into it. She is also interested in developing a formal transition process for incoming members.

Tax Forms and Publications: Stratton wants this committee to focus on whatever they don't have completed by the end of the TAP year as he believes they will have projects that carry over into 2020.

Toll-Free: Kleiber wants the committee to focus on ways to improve the practitioner line to make it more efficient.

Notices and Correspondence: Frausto reported that the committee has issues currently in the Parking Lot that they will revisit and review their new submissions and decide which one(s) to work on.

Member Training

Kevin Brown, secretary to the director, called in and gave the committee specific instructions on how to properly complete their travel expense reports. Brown advised the committee members that any expense over \$75 requires a receipt and advised them to either mail, fax, or email the completed reports to him. He also addressed questions from the attendees and invited them to contact him directly if they had any questions or needed help.

All Member Training – Meeting Rules

Jimerson asked the committee for suggestions on what the TAP Staff could do to improve or make things better for them. Some of the suggestions were:

- Frausto would like videos on how to work on virtual teams and how to set deadlines shown during the Face-to-Face.
- Tracy suggested there be a skit or role-play done to “bring it home” for committee members; which would demonstrate the commitment and the time members will be required to put in as TAP members to help make them aware of what would be required of them.
- Williams mentioned that it would be a good idea to have a thorough demonstration of www.TAPSpace during the Face-to-Face instead of a video to allow them to practice hands on.

English advised the committee that she would look into their suggestions and Jimerson invited them to send any other suggestions to her and asked them to consider being a presenter or part of a training team at the next Face-to-Face. Jimerson also reminded the committee of the importance of being on www.TAPSpace and establishing their profiles there.

Local Taxpayer Advocate Collaborative Efforts

Caroline Ware, the Local Taxpayer Advocate in Phoenix, gave the history of Taxpayer Advocate Service (TAS) and discussed the role of the function and the duties of the Case Advocates (CAs). Ware addressed the high inventory levels of CAs and the efforts in place to reduce the burden. She also suggested that the members reach out to their local LTAs and attempt to collaborate with them on outreach opportunities.

Low Income Taxpayer Clinics

Frank Brusto from the Local Income Taxpayer Clinic (LITC) made a surprise appearance at the meeting. Brusto introduced himself and explained the role of the LITC and who qualifies for representation based on the income guidelines of the state where a taxpayer lives. Brusto suggested that members know where their LITCs are located and explained how to locate them on the website.

Tap Member Survey Results

Jeans displayed the 2018 TAP member survey results on the screen and also distributed hardcopies to the attendees and had each person identify what they felt TAP did well and where they felt TAP could improve. He then focused on the top responses. Overall the committee felt the staff was always very helpful and enthusiastic and do a great job keeping them on track. Alternatively, they felt their fellow team members do not put equal effort into getting things done to help reach committee goals.

Jimerson shared an idea she had about possibly giving the members progress reports showing the number of hours they contributed and remind them of their commitment of 200-300 hours per year to the TAP. The committee tossed around more ideas of how to honor participating and retiring members who go above and beyond.

Action Items

O'Sullivan read an extensive list of action items required of him on his end and Duckworth added a couple more.

PUBLIC INPUT/CLOSING

English thanked the committee for the hard work they do and closed the meeting. There were not attendees from the public at the meeting.

**Next Joint Committee Meeting is on Thursday, August 29, 2019
1:30 p.m. ET; 12:30 p.m. CT; 11:30 a.m. MT; 10:30 a.m. PT**