

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
June 27, 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
- Andrea Price Vice-Chair, Taxpayer Assistant Centers Committee (TAC)
- Cynthia Pinkney Vice-Chair, Toll-Free Phone Line Committee
- Felecia Dixson Vice-Chair, Tax Forms and Publications Committee
- Robert "Bob" Moretti Vice-Chair, Internal Communications Committee (ICC)

Members Absent

- Kathryn Tracy Chair, Taxpayer Assistant Centers Committee
- Philip "Phil" Kleiber Chair, Toll-Free Phone Line Committee

Staff

- Sheila Andrews Deputy Executive Director, Communications, Stakeholder Liaison and Online Services (CSO)
- Lisa Billups Senior Program Analyst
- Cedric Jeans TAP East Chief
- Susan Jimerson TAP West Chief (Absent)
- Fred Smith Program Analyst
- Gilbert Martinez Program Analyst
- Matthew O'Sullivan Program Analyst
- Kudiratu Usman-Olugunna Program Analyst
- Rosalind Matherne Program Analyst
- Kevin Brown Management Assistant
- Antoinette Ross Program Analyst
- Carolyn Duckworth Program Analyst

Members of The Public

N/A

Welcome, Review Agenda

Hirschfeld welcomed everyone and reviewed the agenda.

Roll Call

Quorum was met for the meeting.

DFO/National Office Update

Terrie English reported:

- The Joint Committee annual face to face meeting being held on August 12-16, 2019.
- The Annual Report has been mailed out this week and should be received soon.
- The National Taxpayer Advocate (NTA) sends her apologies because she was not able to make the scheduled call with TAP.

TAP Managers Update

Jimerson reported:

- Matthew O'Sullivan is the new JC analyst while Gilbert Martinez is out.
- Carolyn Duckworth is the new analyst for the TAC committee.
- Jeri Hunter left to be the Local Taxpayer Advocate (LTA) for Alaska, Victor Frausto will chair the Notices and Correspondence committee.
- Hunter will stay with the committee for a short while during her transition period.

Jeans reported:

- Michael Gati resigned, and we are looking for a replacement for him.
- The upcoming tax forum will be in Washington, D.C. and we are furnishing TAP materials for that and each of the other sites.
- Reporting instructions will go out to all forum attendees very soon, according to Smith.
- Smith thanked everyone who has helped with the recruitment process and indicated it is almost completed.

Approval of November 5-30-2019 JC Meeting Minutes

Minutes accepted as amended. Forms and Pubs report corrected to issue 40077 changed to 40047.

TAP Chair Report

Hirschfeld welcomed Frausto as member of JC. Hirschfeld reminded the members attending the JC face to face meeting about making their travel arrangements. Hirschfeld indicated that she had sat in on other committee meetings learning a lot about each committee and finding out how they are similar. Each committee is slightly different as a result of what they are doing and the material they are covering. Hirschfeld applauded how good every committee is.

TAP Vice Chair Report

Kusiak reported that we have our Speak Up brochures in each packet for the tax forums and how hopefully this gives us an opportunity to get feedback during these events. Kusiak thanked all member who are attending these events.

Public Comments

None

Project Committee Review/Activities

Special Projects

Cheryl Williams reported:

35966- Taxpayer Authentication Options. The committee worked on how to get information from IRS using a landline. Our suggestion was to add “or a Landline” giving taxpayer options for those who only use landlines. Williams motioned Stratton seconded.

Action: Issue elevated to the IRS

40785- Filing Threshold for Married Filing Separately. The correct amount should be put on the forms since the amounts range from \$5; \$5000; or \$12,000 are on them. Hirschfeld suggested this should go through Systemic Advocacy (SA) or Attorney Advisors (AA) before it gets elevated. Kusiak explained that \$5 is accurate but individual taxpayers have to determine what the best way to file is for them.

Action: The referral will go through SA and AA before coming back to JC.

Taxpayer Assistance Center Improvements

40902 Add the option of a follow up telephone call for taxpayers who do not use email.

40699- Provide information summary sheet for Volunteer Income Tax Assistance and Tax Counseling for the Elderly (VITA/TCE) to include about offer and compromise. The members working on the VITA projects are working on Form 6744, Publication 4012 and the VITA 50-year anniversary.

40782- Include parking option.

Taxpayer Communications

Anthony said the committee is working on a survey to be sent out and they are working with Dallas LTA on this project.

Tax Forms and Publications

Stratton reported a number of ongoing projects. Subcommittee 1 has four issues plus two IRS responses they are reviewing. Subcommittee 2 has five issues plus two IRS responses being reviewed. Issue 37326 is awaiting internal review, and the committee reviewing 39926 Hard to read forms which may be ready for next month. Issue 36654 on the Form 1040 SR maybe ready for next month. Issue 40103 is on Publication 541 and Instructions regarding LLC partnerships. Issue 40077 is on Form 1099 Misc. according to Stratton.

Toll-Free Lines

Pinkney reported Issue 40558- Amend IVR script to include Public Service Announcement (PSA), taxpayers leave feedback improveirs.org. Pinkney spoke of issue 40704- leaving message option. This is the what the committee is currently working on.

Notices and Correspondence

Frausto reported that subcommittee 1 is working on notices 515 and 108 and they may be ready next month. Subcommittee 2 has two math error notices to be reviewed and more will be provided about this next month. Hirschfeld thanked Frausto for taking over.

Internal Communications Committee

Azzaro reported that guidelines on social media accounts and creating platforms for LinkedIn and Instagram are still being worked at this time.

Round Table

O’Sullivan thanked the Chair and Vice Chair along with management for all of the assistance they provided since this is a new position for him. English reminded the ICC we are awaiting

information/guidance for the social media accounts. We should have something to report by next week.

Closing

English closed the meeting.

**Next Joint Committee Meeting is on Thursday July 25, 2019
1:30 p.m. ET; 12:30 p.m. CT; 11:30 a.m. MT; 10:30 a.m. PT**

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