

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
May 28, 2020**

Designated Federal Official (DFO)

- Terrie English TAP Director

Members Present

- Laurie Brock Chair, Internal Communications Committee (ICC)
- Lindsey Funair Chair, Taxpayer Communications Committee
- Philip “Phil” Kleiber National TAP Chair
- Robert “Bob” Moretti National TAP Vice-Chair
- Andrea Price Chair, Toll-Free Phone Lines Committee
- Stephen Selden Chair, Tax Forms and Publications Committee
- Nina Tross Chair, Taxpayer Assistant Centers Committee (TAC)
- Cheryl Williams Chair, Special Projects Committee
- Felecia Dixson Vice-Chair, Notices and Correspondence

Members Absent

- Tracy Bunner Chair, Notices and Correspondence

Visiting Members

- Patrick Kusiak Member, Tax Forms and Publications

Staff

- Lisa Billups Program Analyst
- Kevin Brown Management Assistant
- Cedric Jeans TAP East Chief
- Susan Jimerson TAP West Chief
- Antonia Keeling Program Analyst
- Gilbert Martinez Program Analyst
- Rosalind Matherne Program Analyst
- Matthew O’Sullivan Program Analyst
- Robert Rosalia Program Analyst
- Antoinette “Toni” Ross Program Analyst
- Fred Smith Program Analyst
- Sheila Andrews Deputy Executive Director, Communications, Stakeholder
Liaison and Online Services (CSO)
- Debra Awalt Program Analyst Wage and Investment (W&I)
- Tamikio Bohler Program Analyst W&I
- Cynthia “Cindy” Jones Manager W&I
- Alton Berger Supervisor, Public Affairs W&I
- Kathy Searcy Program Analyst W&I

Members of The Public

N/A



Welcome, Review Agenda

English welcomed everyone and opened the call. Kleiber reviewed the agenda.

Roll Call

Quorum was met for the meeting.

DFO/National Office Update

English informed the committee that the IRS sent out cards to taxpayers who were not able to receive their stimulus payments electronically. This is not a scam and the information about this can be found on www.irs.gov. There is also a legislative affairs mailbox on www.irs.gov for questions about the Earned Income Tax Credit (EITC) inquiries, but this is only for congressional inquiries and not the public.

English reported that the IRS has started reopening some offices, with limited staff, while states begin to reopen. The tax forums will be virtual this year, Fred Smith is the coordinator for these events. The issue with www.tapspace.org should be resolved at this time. English also reported that the business cards are on standby until the offices in Washington D.C. reopen.

TAP Managers Update

Jimerson thanked Antonia Keeling and all others for helping with the May newsletter and asked for reports for the June newsletter. Jimerson attended a virtual outreach event with the Washington State Local Taxpayer Advocate (LTA).

Jeans reported Jordan Bayless from Indiana resigned. We are developing the redesign of www.tapspace.org and progress is being made. The hope is to be done by September or October of this year.

Approval of April 23, 2020 JC Meeting Minutes

Williams motioned, Tross seconded.

Action: Minutes are approved as submitted.

TAP Chair Report

2019 annual report is available on www.tapspace.org. Kleiber encouraged chairs to have member review the reports. Kleiber indicated the annual report could help with knowing what the current committees worked on last year and may help with referrals being done this year. Kleiber reported that drafts are issues initiated by the IRS and have a shorter time frame for completion which is why they do not go through our normal referral process. English added that the final referral goes through the JC approval process.

Kleiber inquired about the recommendation approval process and English indicated that the version the JC uses will include a motion and second for all referrals.

TAP Vice Chair Report

Moretti said we will need to be more creative with outreach during the pandemic. Blogs, newspapers, magazines, journals, publications and periodicals will have to be used for outreach. Please encourage your members to use these in both electronic and written formats for outreach. This information will be in the next newsletter as a reminder. Moretti reminded the members to use the proper format when submitting reports: include year, committee and purpose or title.

Moretti reported the outreach committee is still updating the files in the outreach toolkit with eight out of twenty-three at this time. We are using a quote from the new National Taxpayer Advocate in these updates.

Public Comments

None

Project Committee Review/Activities

Tax Forms and Publications

Referral Issue 42292 TY 2018 F1040 Instructions Review- Kusiak recommendations made in respect to the CARES act. Selden motioned; Dixon seconded.

Action: Referral elevated to IRS for consideration

Notices and Correspondence

Dixon reported there were four draft referrals that will be finalized after the JC approved them. Drafts had already been submitted to the IRS due to the short time frame. Dixon reported that the committee has at least one more referral that should be ready for the JC in the near future.

Toll-Free Phone Lines

Price reported issue 40558 PSA is being reconsidered by the IRS. Price reported there are five issues related to international taxpayer concerns being worked at this time. There will be a Subject Matter Expert (SME) along with member Laura Snyder at their next meeting. Price reported the committee is considering issues related to calls being disconnected and for extremely long wait times, but no decision has been made at this time.

Special Projects

Williams reported they have three issues awaiting SMEs to be on their calls very soon to provide more information. These issues are still being considered. Issue 36969 has been accepted and will be implemented on 1040 instructions by December 31, 2020.

Taxpayer Communications

Funair reported that the committee is doing outreach to bring attention to the free file program since there may be as many as 25 million taxpayers eligible to use this program.

The committee would also like to promote the free online lookup tool and providers who will complete state tax returns for free. Excellent conversation starter for outreach. Funair reported that Jim Buttonow wrote an article in Accounting Today and encouraged the member to please read and share.

Taxpayer Assistance Center Improvements

Tross reporting the committee is working on a few issues but none which are ready to present at this time.

Internal Communications Committee

Brock spoke about the TAP Newsletter, Facebook and www.tapspace.org. Brock wanted to ensure articles are received on time so the newsletter can get out timely. Brock encouraged members to join the TAP Facebook page. The committee is working on some issues in www.tapspace.org and making Facebook more acceptable and easily used.

Round Table

None

Closing

English thanked everyone for their efforts on the call and closed the meeting. The Virtual All-TAP meeting will be held on June 18, 2020, with a training session and the National Taxpayer Advocate, Erin Collins, along with Maryclaire Ramsey will join the meeting.

Next Joint Committee Meeting is June 25, 2020 at 1:30 p.m. ET