

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
September 26, 2019**

Designated Federal Official (DFO)

- Cedric Jeans TAP East Chief

Members Present

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

Visiting Members

- Robert "Bob" Moretti Vice-Chair, Internal Communications Committee (ICC)
- Paul Berlage Member, Notices and Correspondence
- Hodari Brown Vice-Chair, Taxpayer Communications Committee

Members Absent

- Victor Frausto Chair, Notices and Correspondence

Staff

- Lisa Billups Senior Program Analyst
- Kevin Brown Management Assistant
- Carolyn Duckworth Program Analyst
- Susan Jimerson TAP West Chief (Absent)
- Rosalind Matherne Program Analyst
- Matthew O'Sullivan Program Analyst
- Robert Rosalia Program Analyst
- Antoinette Ross Program Analyst
- Fred Smith Program Analyst
- Tamikio Bohler Program Analyst W&I

Members of The Public

N/A

Welcome, Review Agenda

Jeans opened the call and noted an agenda change. English and Jimerson will not be on the call and he will be giving reports for them. Hirschfeld welcomed everyone and reviewed the agenda.

Roll Call

Quorum was met for the meeting.

DFO/National Office Update

Jeans wants the committee chairs to decide if they need to set an extra meeting in November to ensure all referrals that are elevated to the JC are heard before this committee.

We are working on the Presidential awards, headed by Fred Smith, who may be asking for an updated picture and biography for retiring members. We are working on the face to face meetings for the beginning of the next TAP year. We are working on the training materials and looking for returning members to help with this project. Billups reported that the recruitment package is in the review and approval process.

Jeans reported that Gilbert Martinez and Otis Simpson are back from their work details and Carolyn Duckworth will be ending her work detail with us very soon. Jeans thanked her for her efforts and all she contributed to TAP. We are currently putting together a social media guide with the assistance of Communications, Stakeholder Liaison & Online Services (CSO). We appreciate their assistance with this process.

TAP Managers Update

N/A

Approval of 8-29-2019 JC Meeting Minutes

Stratton updated the Tax Forms and Publications committee report. After the four completed referrals for that month, there were two responses from the IRS for issues: 40101 and 38527, which are currently under review.

The committee is currently working on issues for Pub. 531 and Form 965 and related Forms A and B, to ensure the status of these issues were reflected accurately in the report. O'Sullivan made the corrections and the minutes were accepted as amended.

TAP Chair Report

Hirschfeld reported that members have to September 27, 2019, midnight to nominate or self-nominate for TAP leadership next year. There will be a "meet the candidates" session on Thursday, October 17, 2019, at 2:00 p.m. Ballots will be sent out on October 17, 2019 and due back by October 25, 2019. The results will be communicated on Friday, November 1, 2019.

Since there are only two more JC meetings, please complete any referrals you are working on so that they may be considered by the committee before the TAP year ends in November. Our last JC meeting will be November 21, 2019. In preparing for the Annual report, Hirschfeld would like to highlight one accomplishment for each committee and would like each chair to send it to her.

TAP Vice Chair Report

Kusiak reported that the tax forums ended last week, we expanded our awareness for recipients. The audience reached so far has exceeded 2018 totals.

2019 TAP Annual Report

Martinez solicited for members for the Annual Report committee. The first meeting will be on October 11, 2019, at 2 p.m. Hirschfeld will include a letter from the departing chair, Kusiak will

have an outreach summary. The committee chair reports will be used from each project committee, which the analysts will assist with.

Public Comments

None

Project Committee Review/Activities

Tax Forms and Publications

36545 Credit for Small Employer Health Insurance Premiums. Stratton motioned, Tracy seconded.

Action: Issue elevated to IRS for consideration.

36654 Form 1040-SR: U.S. Tax Return for Seniors. Stratton motioned, Williams seconded.

Action: Issue elevated to IRS for consideration.

40664 Schedule A & Instructions. Stratton motioned, Kleiber seconded.

Action: Issue elevated to IRS for consideration.

40751 2019 Form 1040: U.S. Individual Income Tax Return. Stratton motioned, Williams seconded.

Action: Issue elevated to IRS for consideration.

Stratton reported they reviewed IRS responses to issues 40163 and 40304. They accepted the responses and closed the issues. We are currently working on six issues:

Subcommittee 1

- **41347** - Form 965 & Related Schedules
- **41167** – Retirement 401K Contribution limits – Pub 7001
- **41505** – F8867 and Sch EIC

Subcommittee 2

- **41402** - Pub 531
- **41504** - F8993
- **41382** – Sch C & Sch E

Special Projects

41230 Clarification of Due Date of Substitute Form 3520-A. The referral was updated for formatting accuracy. Williams motioned, Tracy seconded.

Action: Issue elevated to IRS for consideration.

37026 Prevention of Identity Theft Relating To Refunds. Williams motioned, Folta seconded.

Action: Issue elevated to IRS for consideration.

40164 Request for USVI Taxpayer Advocacy Panel Member.

Issue elevated to the NTA office.

Williams reported working:

41296 Electronic Withdrawals on POAs on E-Services

41405 Different ways to prove ID

41411 New Zealand Phone identification.

Taxpayer Assistance Center Improvements

40699 VITA/TCE Payment Options, Including Offer-In-Compromise. Tracy motioned, Stratton seconded.

Action: Issue elevated to IRS for consideration.

40902 Telephone Appointment Confirmation to Taxpayers. Tracy motioned, Williams seconded.

Action: Issue elevated to IRS for consideration.

Tracy reported the committee working hot topics. The current issue is having readily accessible listing of tax professionals on IRS and OPR websites. Tracy highlighted their rewrite of the test for the Volunteer Income Tax Assistance (VITA) with Stakeholder Partnerships, Education & Communication (SPEC) as their best accomplishment for this year. They are awaiting an IRS response for a recently elevated issue.

Toll-Free Lines

40558 Public Service Announcement for improveirs.org on Toll-Free Phone Lines. Kleiber motioned, Williams seconded.

Action: Issue elevated to the IRS for consideration.

Kleiber reported the committee working on an issue to add a Public Service Announcement on the practitioner line to help find the status of Power of Attorney forms. They had a screening meeting that covered a lot of referrals received from the tax forums with a lot of them about the practitioner line. They will focus on this line a lot more now. Kleiber highlighted the IRS adding budget for callback technology based on a 2018 referral from this committee.

Notices and Correspondence

Folta presented issue 38667 CP90 Federal Payment Levy Program (FPLP)/Final Notice of Intent to Levy. Berlage spoke about the details of the referral and highlighted the need to allow for temporarily uncollectible status be more available for taxpayers. Folta motioned, Stratton seconded.

Action: Issue elevated to IRS for consideration.

Folta expects issues 40907 and 40908 to be for October hopefully. It has been awesome how the committee and IRS staff has been during these changes, according to Folta.

Taxpayer Communications

Duckworth reported two referrals being reviewed by Quality Review (QR), 40723 and 41392. The committee hopes to have them ready by the end of the TAP. We had a screening call and dropped two issues and left some in our Parking Lot.

Internal Communications Committee

Azzaro said they are working on social media library in www.tapspace.org. Azzaro asked each of her members to create three post to be uploaded in the library. Azzaro is asking this committee to solicit voluntary posts from their members to add to this library as well. They are working on continuation guidelines for the committee for future committees. Ross reported Chamille Houston, from CSO, is the Subject Matter Expert who will be helping on this guide. Azzaro said the Social media post library list is the biggest accomplishment this year for the committee.

Round Table

Williams was published in the EA Magazine. She will send it to Jeans. Williams did a radio interview and will give a presentation about TAP later this month. Martinez will send an invite and timeline for the Annual Report contributions. O'Sullivan thanked Jeans and Duckworth and the JC for helping him with his role as the committee analyst.

Action Items

- Approved minutes.
- Elevating referrals to IRS. (11 in total).
- O'Sullivan will be sending information regarding nominees for the TAP elections.

Closing

Jeans thanked everyone for their efforts on the call and closed the meeting.

**Next Joint Committee Meeting is on Thursday, October 31, 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.