

**2013 Meeting Minutes  
Taxpayer Assistance Center (TAC) Improvements Project Committee**

- November 11, 2013
  - September 10, 2013
  - August 13, 2013
  - July 9, 2013
  - June 11, 2013
  - May 14, 2013
  - April 9, 2013
  - March 12, 2013
  - February 12, 2013
  - January 8, 2013
  - December 6-7, 2012
- 

**Taxpayer Assistance Center (TAC) Improvements Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
November 11, 2013**

**IRS Staff**

- Rose A. Babb – Management Assistant
- Laura Boyd – Program Analyst
- Sheila Stevens-Brown – Program Analyst
- Donna Powers – Program Analyst
- Louis Morizio (Absent) – Designated Federal Officer
- Sheila Andrews – TAP Director
- Bill Mezger – TAS Portfolio Manager

**TAP Members**

- Barbara Baldwin (Absent) – Auburn, CA
- Patricia Dosdall (Absent) – Huntsville, AL
- James Doty – Charleston, SC
- Aileen Fisher – Burlingame, CA
- Annette Fitzgerald (Absent) – Branson, MO
- Allan Goldberg – Montvale, NJ
- Eugene Goldfarb – Syosset, NY
- Robert Gross – Montpelier, VT
- Gerald Janci – Pittsboro, MS
- Robert Phillips (Absent) – Dallas, TX
- Alphonse Piard (Absent) – Miami, FL

- Michael Silva, (Absent) – North East, MD
- Toni Smith – Omaha, NE
- Edward Sykes – Rose Hill, KS

### **Welcome/Announcements**

Sykes welcomed everyone to the call. This was the last full committee meeting for the year. Quorum was not met and so proposals could not be approved by the members. Sykes thanked the member including those rotating off their third year membership for their hard work and dedication to the Taxpayer Advocacy Panel

### **DFO Report**

Knispel was the Designated Federal Officer on this teleconference; she welcomed everyone and turned the meeting over to the Chair.

### **TAP Director**

Andrews thanked all the members including those that are rotating off of TAP for their commitment and dedication to the TAP. Due to the furlough and government shutdown, the TAP Regional meetings will be rescheduled for the week of February 24, 2014. There will be an administrative meeting on December 9, 2013 for new members.

### **Public Participation**

None

### **Closing**

Sykes closed the meeting and thanked everyone for attending the call. This is the last meeting for the full committee.

Powers expressed her gratitude to the members for the extraordinary work they have done all years.

These minutes were approved on January 13, 2014.



**Taxpayer Assistance Center (TAC) Improvements Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
September 10, 2013**

**IRS Staff**

- Amy Albee – Policy Analyst
- Rose A. Babb – Management Assistant
- Laura Boyd – Program Analyst
- Sheila Stevens-Brown (Absent) – Program Analyst
- Bob Fett – Local Taxpayer Advocate
- Donna Powers – Program Analyst
- Louis Morizio (Absent) – Designated Federal Officer
- Beth Braddock (Absent) – Management & Program Analyst
- Sheila Andrews (Absent) – TAP Director
- Bill Mezger – TAS Portfolio Manager

**TAP Members**

- Barbara Baldwin – Auburn, CA
- Patricia Dosdall – Huntsville, AL
- James Doty – Charleston, SC
- Aileen Fisher (Absent) – Burlingame, CA
- Allan Goldberg (Absent) – Montvale, NJ
- Eugene Goldfarb – Syosset, NY
- Robert Gross – Montpelier, VT
- Gerald Janci – Pittsboro, MS
- Robert Phillips (Absent) – Dallas, TX
- Alphonse Piard (Absent) – Miami, FL
- Michael Silva (Absent) – North East, MD
- Toni Smith – Omaha, NE
- Edward Sykes – Rose Hill, KS

**Welcome/Announcements**

Sykes welcomed everyone to the call. Quorum was not met for this teleconference. The minutes for August will be approved via email by the full committee with some edits to be made before posting.

**DFO Report**

Powers was the Designated Federal Officer on this teleconference; she welcomed everyone and turned the meeting over to the Chair.

### **Program Owner**

Albee joined the call for Braddock. She did not have anything new to report to the members.

### **Subcommittee Report Out**

On Issue 28100 – *Individual taxpayer Identification*, Powers indicated that she has scheduled a call with ITIN Subject Matter Experts for next week to discuss the ITINs.

On Issue 28103 – *Virtual Service Delivery (VSD)*, Sykes mentioned that he has some Subject Matter contacts to speak with before he completes his draft report. Mezger mentioned that his office will be testing all VSD on Thursday.

On Issue 27968 – *Interns/Volunteers in the Taxpayer Assistance Centers, TACs*, Dosdall noted that there are some privacy issues to be considered including some additional discussions with Gross. They have reached out to Brian Picariello from the Human Capital Office and are waiting some guidance on this issue

On Issue 27922 – *Form 2290 Heavy Highway Vehicle Use*, Smith is waiting for some additional information from Goldberg and will subsequently proceed with a draft write up to submit by next week.

On Issue 28183 – *Cash Payments in the TACs*, Powers indicated that she is working on some statistics on cash payment options at TACs through Wage & Investment Division.

Boyd mentioned that cash payments in the TACs are number 17 on the National Taxpayer Advocate Nina Olson's Most Serious Problems on her Annual Report to Congress for 2013.

### **Outreach Reports**

Janci mentioned that there were a few issues gathered from the tax forums in August. He reminded the members that it is imperative that they send in their outreaches and hours spent on TAP business to receive credit for their work.

### **Public Participation**

Elizabeth Chaney, joined as a member of the public, she said that she enjoyed the discussion. Chaney stated that she plans to join the other project committee calls for the rest of September.

### **Closing**

Sykes closed the meeting and thanked everyone for attending the call. The next teleconference is scheduled for October 9, 2013.

These minutes were approved on January 13, 2014.

**Taxpayer Assistance Center (TAC) Improvements Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
August 13, 2013**

**IRS Staff**

- Rose A. Babb – Management Assistant
- Laura Boyd – Program Analyst
- Sheila Stevens-Brown – Program Analyst
- Bob Fett – Local Taxpayer Advocate, Portfolio Advisor
- Lashawne King – Program Analyst
- Donna Powers – Program Analyst
- Louis Morizio – Designated Federal Officer
- Beth Braddock – Management & Program Analyst
- Sheila Andrews – TAP Director
- Bill Mezger – Local Taxpayer Advocate, Portfolio Advisor

**TAP Members**

- Barbara Baldwin – Auburn, CA
- Patricia Dosdall – Huntsville, AL
- Aileen Fisher – Burlingame, CA
- Allan Goldberg – Montvale, NJ
- Eugene Goldfarb – Syosset, NY
- Robert Gross – Montpelier, VT
- Gerald Janci, (Absent) – Pittsboro, MS
- Robert Phillips – Dallas, TX
- Michael Silva, (Absent) – North East, MD
- Toni Smith – Omaha, NE
- Edward Sykes – Rose Hill, KS

**Welcome/Announcements**

**DFO Report**

Morizio stated that the Annual Joint Committee Meeting in Milwaukee, WI was productive. At the JC meeting, members reviewed the parking lot list of issues and eliminated those issues that were not workable. Most of those issues were in the parking lot since 2010, a few issues will be re-assigned. Based on the issues remaining, the chairs will come up with committee proposals for next year. Powers will be sending out the new issue referral form template to members via email. Morizio stated that if members join the teleconference late, they should announce themselves in order to be marked present.

Regarding additional questions for the Subject Matter Expert, Morizio asked members to send those follow-up or new questions to Powers who will send them to Momon-Townsend for answers. A deadline for the submission of those questions to Powers is this Friday, August 16, 2013. There are just 3 meetings left subsequent to this August meeting.

Fett and Metzger will be the contact persons that Sykes will work with to provide guidance on Virtual Service Delivery and Transcripts.

Morizio asked members to delete Fields as a contact in their address books, since she is no longer on the TAP Staff. All emails sent previously to Anita Fields should now be addressed to Powers with a copy to Morizio.

### **Subcommittee Report Out**

On Issue 28100 – *Individual taxpayer Identification*, there were 12 suggestions for improvements on the policies and procedures that impact wait time. Allan Goldberg gave an overview of the process. The subcommittee would like to meet with an ITIN employee to discuss TAP's suggestions. Powers will provide that contact information.

On Issue 28103 – *Virtual Service Delivery*, there is still some more work to be done, and the subcommittee is working on information from the VSD Report of 2012 to incorporate in their referral.

On Issue 27968 – *Interns/Volunteers in the TACS*, Powers is working on providing a contact person from the Human Capital Office to work with TAC members on this issue.

On Issue 27922 – *Form 2290 Heavy Highway Vehicle Use*, Smith received some information in addition to some information provided by a SME. Smith will do the write up and send to Powers by Friday, August 16, 2013.

On Issue 28183 – *Cash Payments in the TACs*, Goldfarb sent a draft proposal to his subcommittee and received some feedback from Piard, but Janci has not responded as of this teleconference. Goldfarb would like to include some information on Kiosk payments before completing the draft.

On Issue 28101 – *Tax Preparer Fraud*, this issue was rejected by the IRS will be placed in the Parking Lot list to be revisited in 2014.

### **Outreach Reports**

Piard had an outreach event that has been posted to TAP Space. Powers added that the members should continue reporting their outreach events to TAP Staff in a timely manner.

### **Public Participation**

There were no members from the public.

**Closing**

Sykes will send out a solicitation to ask for input on ideas for what to pursue next year.

Sykes closed the meeting and thanked everyone for attending the call. The next teleconference is scheduled for September 10, 2013.

These minutes were approved by the full committee on September 10, 2013.

**Taxpayer Assistance Center (TAC) Improvements Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
July 9, 2013**

**IRS Staff**

- Rose A. Babb – Management Assistant
- Donna Powers – Program Analyst
- Louis Morizio – Designated Federal Official
- Beth Braddock – Management & Program Analyst
- Sheila Andrews – TAP Director
- Laura Boyd – Program Analyst
- Bill Mezger – TAS Portfolio Manager
- Sheila Stevens-Brown – Program Analyst
- Michelle Burger – W & I Senior Advisor, Liaison

**TAP Members**

- Barbara Baldwin, Member – Auburn, CA
- Patricia Dosdall, Member – Huntsville, AL
- Aileen Fisher, Member – Burlingame, CA
- Allan Goldberg, Member – Montvale, NJ
- Robert Gross, Member – Montpelier, VT
- Gerald Janci, Member – Pittsboro, MS
- Michael Silva, Member – North East, MD
- Toni Smith, Member – Omaha, NE
- Edward Sykes, Member – Rose Hill, KS
- Robert Phillips – Dallas, TX

**Welcome/Announcements**

Sykes welcomed everyone to the call. A meeting with Sykes and Mezger will be set up to discuss improving VSD issues at the Taxpayer Assistance Centers. The meeting minutes for June teleconference were approved for posting by the full committee.

**DFO Report**

Morizio stated that the Joint Committee's Face to Face meeting has been approved for August in Milwaukee, WI. Hopefully, future meetings will be approved as well. Powers will be contacting subject matter expert Mark Johnson to join the next teleconference in August.

Morizio provided a follow up on the proposed elimination of the Joint Committee (JC) Quality Review Team. The JC agreed that going forward there will be only the Committee Quality Review Teams. The Committee Quality Review (CQR)

Teams will function to review all recommendations. In addition, the CQR Teams will be rewriting the proposals instead of "just reviewing" which is the purpose of the QR team.



Morizio mentioned that the outreach spreadsheet has been revised. Starting with the July report, there will only be two columns for hours – one to record the outreach hours and the other for all hours spent on other TAP work. The hours reported for the first half of the year should be carried over to July when the committee members send their reports to Powers next month. If members have any questions, they should contact Powers.

### **Program Report**

Tina D'eredita was not present for this meeting and there were no new updates from the other staff members on the call.

### **Subcommittee Report Out**

The two subcommittees had a joint meeting on July 2, 2013, at 11 a.m. ET.

### **Wait Time**

Goldfarb is working on the cash payments at the TACS and Smith is working on Form 2290. Gross has done some research on the intern student volunteers and will provide his recommendations to Powers.

### **Publicity/ Marketing**

Mezger, Portfolio Advisor for TAC, has some useful information on VSDs; he has offered to help write the narrative for the recommendation.

### **Outreach Report**

Morizio mentioned that the outreach spreadsheet has been revised. Going forward, there will be only two columns one to record the hours and the other for all other hours spent on TAP work. The reports that were already submitted for June should be combined with July. Powers has already sent out the new spreadsheet to be used. If members have any questions, they should contact Powers.

Sykes reported that there were a total of 7 outreaches done with an audience of 300 for the month of June. The committee will continue to visit TAC sites.

### **Public Participation**

There were no members from the public.

### **Closing**

Sykes and Morizio thanked all for joining the call and closed the meeting. The next teleconference is scheduled for August 13, 2013, at 2 p.m. EST.

These minutes were approved by the full committee on August 13, 2013.



**Taxpayer Assistance Center (TAC) Improvements Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
June 11, 2013**

**Designated Federal Officer (DFO)**

- Morizio, Louis

**Members Present**

- Baldwin, Barbara
- Dosdall, Patricia
- Fisher, Aileen
- Fitzgerald, Annette
- Goldberg, Allan
- Goldfarb, Eugene
- Gross, Robert
- Janci, Gerald
- Phillips, Robert
- Smith, Toni
- Sykes, Edward

**Members Absent**

- Doty, James
- Piard, Alphonse
- Silva, Michael

**Staff Present- TAP/TAS**

- Powers, Donna – Program Analyst

**Program Owners**

- Braddock, Beth – Management & Program Analyst

**Other IRS Staff**

- Andrews, Sheila – TAP Director
- Mezger, Bill – TAS Portfolio Manager
- Scott, Betty – W & I Program Manager, MSP Coordinator
- Stevens-Brown, Sheila – Program Analyst
- Jones, Cindy – W & I CARE, HQ – SPEC-HQ
- Burger, Michelle – W & I Senior Advisor, Liaison
- King, La Shawne – W & I, Back-Up Sheila Stevens-Brown
- Momon-Townsend, De'borah – W & I Liaison
- Fett, Bob – LTA, TAS Portfolio Advisor Virtual Service Delivery, Transcripts, MSP Lead

**Public Participants**

- None



## **Welcome/Announcements**

Morizio welcomed everyone to the call.

After roll call, the visitors on the call were asked to identify themselves and their function.

## **National Office Update**

Morizio provided an update on the recruitment process. He will be making recommendations to the TAP Director for the selections for each state. Morizio will also be deciding on alternates who will possibly become TAP members. The Director will be making those recommendations to Rena Girinakis (EDSA), Nina Olson ((NTA), and then the recommendations will be rolled up to the IRS Commissioner & Secretary of the Treasury. Louis thanked those who helped on the interviews.

TAP Realignment – This committee has been affected. Donna Powers and Rose Babb will continue to support this committee as analyst and secretary. TAP East has lost three employees, which mean Powers will be assuming most of Anita Field's duties for the committee. All outreach should now be sent directly to Powers.

Tax Forums – Powers has reached out to the TAP members to solicit volunteers. The hand outs will be shipped to each location, with no assistance from the TAP employees. There should not be too much, because TAP is limited to three handouts, Speak-Up Brochures, Issue Tri-Folds, and business cards. There will be a conference call before each Forum with the members attending. Babb will be contacting the members concerning the call, as well as travel arrangements. There will be no CPE hours provided.

VITA – There were several issues received by Powers concerning Tax Wise, which have been sent through De'borah Momon-Townsend and transferred to the team. Phillips has asked for information on the software aspect of the products. Marisa Knispel is leading this team. Barbara Baldwin is on the Pub 4012, Allan Goldberg and Robert Phillips, Publication 4012, *Resource Guide*, Knispel was asked to send out all the information to the team.

## **Approval of Minutes**

The meeting minutes for May teleconference were approved, with corrections for posting by the full committee.

## **Chair Comments**

Sykes welcomed everyone to the call. He has asked the TAP Director to set up a meeting between himself and the NTA. If anyone has any input for this meeting, please email him.



### **Program Owners**

Beth Braddock indicated she had nothing to report. Powers indicated she has added a discussion thread on Tap Space looking for questions to ask subject matter experts. The deadline for those questions is June 13, 2013.

### **Subcommittee Report Out**

The two subcommittees will have a joint meeting on July 2, 2013 at 11 a.m. ET.

### **Wait Time**

Gene Goldfarb reported on the subcommittee call. He discussed payments and payment kiosks. He is waiting on a report from Powers on the other federal organizations concerning payments. IRS seems to be special in the way they handle cash payments. Toni Smith is working on the Form 2290 and is waiting on information. James Doty is working on the ITIN program and Ed is working on the VSDs. Bob Gross is working on the Intern/Volunteer program. He has made a good deal of progress on the subject.

### **Publicity/ Marketing**

Jerry Janci reported that as the Wait Time subcommittee comes up with ideas on the reasons why people are having long wait times, the Publicity/Marketing subcommittee will use those as a basis for publications to market on how to avoid the wait times. Community partnerships, VITA, Extension offices are some of the places to promote the information. Social Security offices were mentioned, as well as community partnerships who are involved with the Affordable Health Act.

During the joint meeting in July, the two subcommittees will be working on the recommendations. Baldwin would like to see an outline for the recommendations the committee will be making in the coming weeks.

### **Outreach**

Janci reminded members to send in their outreach reports monthly. Another reminder all outreach should now be sent directly to Powers. The June report should be sent in by July 1, 2013. All meetings, including the committee meeting and subcommittee reports should be included on the report. Morizio indicated, after consultation with the Outreach team, the report has been changed. The report has been consolidated into two columns, the hours column and the second column, which is all other hours spent on other TAP related work. This report will be discussed at the next JC call. Fisher discussed her outreach for the month, which included a web seminar, where she shared the Outreach tool kit, which she had modified.

After a lengthy discussion about sending and receiving the outreach, it was decided that the analyst will send a copy of the consolidated monthly report to each of the members of the committee, so that they can see if there information has been received and input into the database.



### **Round Robin**

Sykes asked Baldwin to give a short tutorial/email on the recommendation process on the next subcommittee call.

### **Public**

None

### **Closing**

Sykes and Morizio thanked all for joining the call and closed the meeting.

The next teleconference is scheduled for July 9, 2013 2 p.m. EST.

These minutes were approved by the full committee on July 9, 2013.



**Taxpayer Assistance Center (TAC) Improvements Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
May 14, 2013**

**Designated Federal Official (DFO)**

- Morizio, Louis

**Members Present**

- Dosdall, Patricia
- Fisher, Aileen
- Fitzgerald, Annette
- Goldberg, Allan
- Goldfarb, Eugene
- Gross, Robert
- Janci, Gerald, Vice Chair
- Phillips, Robert
- Smith, Toni
- Sykes, Edward, Chair

**Members Absent**

- Baldwin, Barbara
- Piard, Alphonse
- Silva, Michael

**Staff Present- TAP/TAS**

- Babb, Rose A – Management Assistant
- Fields, Anita – Program Analyst
- Powers, Donna – Program Analyst

**Program Owners**

- D'eredita, Tina – Wage & Investment (Absent)
- Braddock, Beth

**Other IRS Staff**

- Mezger, Bill – TAS Portfolio Manager
- Stevens Brown, Sheila – Program Analyst

**Public Participants**

- None

**Welcome/Announcements**

Powers acted as the Designated Federal Official and welcomed everyone to the call. Morizio was conducting interviews for 2013 TAP membership.

### **Approval of Minutes**

The meeting minutes for April teleconference were approved for posting by the full committee.

### **Chair Comments**

Sykes welcomed everyone to the call; he stated that the news on the IRS lately has been very frustrating. However, he mentioned that members must remind themselves about what the TAP's mission is about.

### **Program Owner Report**

D'eredita was not present and so, there was no report presented.

### **Subcommittee Report Out Publicity**

Janci mentioned that during the last subcommittee meeting, there were some suggestions for publicizing TAC sites. Janci stated that his subcommittee has not determined what they want to be publicized. The Wait Time subcommittee will make the final decision on their suggestions.

### **Wait Time**

Powers reported that the Wait Time Subcommittee is still working on the following recommendations:

- Virtual Service Delivery Systems
- Form 2290, *Heavy Highway Vehicle Use Tax Return*
- Individual Taxpayer Identification Numbers, ITIN
- Payment Kiosks
- Volunteer Interns / Work Study Programs.

### **Outreach**

Janci mentioned that so far this year, there have been 19 members that have not turned in outreach. As of April 29 there were 13 outreaches with an audience of 239. Janci mentioned that the hourly report is very important; it shows the IRS what TAP members are doing.

Goldberg attended an outreach "Law Day" in the Downtown Financial District of New York City with his Local Taxpayer Advocate; he shared what TAP does and how they can help as well.

### **Feedback on Wait time**

1. Gross stated that there are cases where taxpayers travel long distances to get to a Taxpayer Assistance Center. He also noted that some TAC offices have one employee assisting taxpayers.
2. A member referenced that NTA, Olson had suggested that appointments should be offered for specific issues only.
3. Braddock mentioned that if appointments are set up it should be for the specific topic and for specific time frames for those appointments issues only.

4. Sykes stated that he will make inquiries to find out if the IRS supports work study programs and volunteer interns to assist the TAC.
5. Momon-Townsend suggested that members first write up their issue regarding the IRS funding for work study program/volunteer interns and then submit to her office to research it and provide feedback.

### **Round Table**

There were no additional comments.

Powers mentioned that TAP must be on the same page with the objective of the NTA, Olson and, if there are contradictions, TAP members can bring to a discussion.

Sykes stated that TAP should recommend opening more TAC sites within reasonable distances for taxpayers to visit.

### **Public Participation**

None.

### **Closing**

Sykes and Powers thanked all for joining the call and closed the meeting.

The next teleconference is scheduled for June 11, 2 p.m. EST.

These minutes were approved by the full committee on June 11, 2013.





**Taxpayer Assistance Center (TAC) Improvements Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
April 9, 2013**

**Designated Federal Official (DFO)**

- Morizio, Louis

**Members Present**

- Dosdall, Patricia
- Fisher, Aileen
- Fitzgerald, Annette
- Goldberg, Allan
- Goldfarb, Eugene
- Gross, Robert
- Janci, Gerald
- Silva, Michael
- Smith, Toni
- Sykes, Edward

**Members Absent**

- Baldwin, Barbara
- Phillips, Robert
- Piard, Alphonse

**Staff Present – TAP/TAS**

- Babb, Rose A – Management Assistant
- Powers, Donna – Program Analyst

**Program Owners**

- D'eredita, Tina – Wage & Investment

**Other IRS Staff**

- Andrews, Sheila – TAP Director
- Braddock, Beth – Management & Program Analyst
- Mezger, Bill – TAS Portfolio Manager
- Scott, Betty – Program Manager
- Stevens Brown, Sheila – Program Analyst

**Public Participants**

- None

**Welcome/Announcements**

Morizio welcomed everyone to the call and provided an update on the recruitment process. The recruitment period ended last Tuesday morning. Managers and National

Office Staff will be ranking the packages to determine those applicants that will be selected for interviews. Members are asked to volunteer their time to assist the managers and Local Taxpayer Advocate to conduct interviews. Those members who wish to participate should contact Fields in the Plantation office with their available schedules.

Morizio asked members to send all questions or inquiries to Powers, with a CC to him. Powers will forward their inquiries to the appropriate staff in the IRS.

### **Approval of Minutes**

The meeting minutes for March teleconference were approved for posting by the full committee.

### **Chair Comments**

Sykes welcomed everyone to the call; he did not have anything new to report.

### **Office Report**

D'eredita welcomed everyone to the call; she did not have anything new to report. However D'eredita also mentioned that it would be beneficial to keep the members inquiries centralized through Powers and Morizio only.

### **VSD Report**

Mezger mentioned that he is very impressed with the Virtual Service Delivery System that is installed at the TAC walk in centers. He highlighted some of the special features of the VSD System; the scanner is very clear. The IRS will keep records of employees that were assigned to the machine to assist taxpayers. Mezger also stated that the machines are fairly simple to use.

### **Recommendations for 2012**

Powers presented the 2012 responses received from the IRS in reference to the 2012 Recommendations. There were six recommendations sent to the IRS, one was fully accepted, two partially accepted and three were rejected.

The current TAC panel is looking at some of the same issues the 2012 panel looked at; alternatives for visiting the TAC sites.

Members suggested that there be an alternative for taxpayers. Using the TAC walk in centers will reduce long lines.

### **Subcommittee Report Out**

#### **Wait Time**

Goldfarb suggested that his subcommittee should refine and consolidate their suggestions. There is not enough time on the teleconferences to discuss solutions to the issues that they are working on.



### Publicity/ Marketing

Fischer mentioned that there is an increase of notices sent to taxpayers from the IRS. These notices are sent to have Taxpayers come in to the TAC centers to claim their refund. Fischer noted that this adds to the traffic at the IRS Centers.

### Outreach

Janci reminded members to send in their outreach reports monthly. Always indicate the time spend on TAP business this includes the teleconference calls as well.

### Round Robin

Powers requested a lead for the Publicity Subcommittee. Members are asked to send Powers an email if interested. This subcommittee will change the time of its meeting from at 12 p.m. EST to 1 p.m. EST on the first Tuesday of each month.

### Public

None.

### Closing

Sykes and Morizio thanked all for joining the call and closed the meeting.

The next teleconference is scheduled for May 14 at 2 p.m. EST.



**Taxpayer Assistance Center (TAC) Improvements Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
March 12, 2013**

**Designated Federal Official (DFO)**

- Knispel, Marisa

**Members Present**

- Baldwin, Barbara
- Fisher, Aileen
- Fitzgerald, Annette
- Goldfarb, Eugene
- Silva, Michael
- Smith, Toni

**Members Absent**

- Dosdall, Patricia
- Goldberg, Allan
- Gross, Robert
- Janci Gerald, Vice Chair
- Piard, Alphonse
- Sykes, Edward, Chair

**Staff Present – TAP/TAS**

- Babb, Rose A. – Management Assistant
- Fields, Anita – Program Analyst
- Jenkins, Audrey – Program Analyst

**Program Owners**

- D'eredita, Tina – Wage & Investment

**Other IRS Staff**

- Braddock, Beth – Management & Program Analyst
- King, Lashawne – Program Analyst
- Stevens Brown, Sheila – Management & Program Analyst

**Public Participants**

- None

**Welcome/Announcements**

Knispel was the acting DFO; she welcomed everyone to the call and provided an update on the status of the recruitment applicants. As of today; there are 51 completed applicants and 191 in the process to be completed. The recruitment period ends April 1, 2013.

### **Approval of Minutes**

The meeting minutes for February's teleconference were approved by consensus for posting by the full committee.

### **Chair Comments**

The chair and vice chair were absent. Therefore, there were no announcements. Jenkins provided an update on members requesting TAC visits. Members were informed that lists of the Taxpayer Assistance Centers (TAC) they wish to visit were provided to IRS program owners. The program owners will be in contact with the analyst of the project committee who will in turn contact the members with an update.

### **Subcommittee Report Out**

#### **Wait Time**

- 1) There was some discussion on the issue of volunteers, what exactly would be their role, and what if any role the union might have in TAC Project Committee considerations. Also there was a brief mention as to cash payments and cash handling procedures, and whether we had received a report on this from the program analysts.
- 2) There were requests by committee members for the outstanding surveys and reports on TAC priorities, practices, and findings that were not previously produced. These were finally produced and emailed to us after the meeting.
- 3) There was also some discussion on finding out how TAC eventual proposals would make real contributions to the overall TAP effort to advise the IRS that would mesh with other proposals being developed and elevated by the other TAP committees. To this end it was expressed that we get at least some kind of interim report or advisory on the work of the other committees.

#### **Publicity/ Marketing**

Fisher reported that her subcommittee had a discussion on dedicating phone lines to answer taxpayer questions, using the media/television to get the word out on ID theft, and developing workshops to discuss educating the public.

### **Outreach**

There was no outreach activities presented at this teleconference.

### **Round Robin**

Fisher mentioned that she had requested some statistics from a TAC manager and received an email explaining that what she was requesting it is being handled at the National level. Since TAP has not been included in this request, she will be forwarding those emails to Jenkins for follow up.

### **Round Table**

Goldfarb mentioned that the 2012 TAC Questionnaire for TAC may not be very effective if there are few participants. He stated that with few participants taking the survey, it is difficult to gauge the validity if one does not know how many questions were not



answered. Goldfarb also stated that the Instructions to complete the survey were not useful.

**Public**

None.

**Closing**

Knispel and Jenkins thanked the members for joining the call.

The next teleconference is scheduled for April, 9 2013 at 2 p.m. EST.



**Taxpayer Assistance Center (TAC) Improvements Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
February 12, 2013**

**Designated Federal Official (DFO)**

- Morizio, Louis, TAP Program Manager

**Members Present**

- Dosdall, Patricia
- Fisher, Aileen
- Fitzgerald, Annette
- Goldberg, Allan
- Goldfarb, Eugene
- Gross, Robert
- Janci, Gerald, Vice Chair
- Phillips, Robert
- Silva, Michael
- Smith, Toni
- Sykes, Edward, Chair

**Members Absent**

- Baldwin, Barbara
- Piard, Alphonse

**Staff Present – TAP/TAS**

- Babb, Rose A. – Management Assistant
- Jenkins, Audrey – Program Analyst

**Program Owners**

- D'eredita, Tina – W&I
- Braddock, Beth, W&I
- Momon – Townsend, Deborah, W&I

**Public Participants**

- None

**Welcome/Announcements**

Morizio opened the meeting and welcomed everyone. He thanked Goldfarb for his work on EITC Awareness Day and his efforts in distributing the TAC Survey.

All Local Taxpayer Advocates are attending a Congressional Affairs Program Conference meeting this week in Washington, DC to discuss issues in TAS. Subsequent to the CAP Conference, The Taxpayer Assistance Service LTAs will be visiting Congressional Representatives to discuss the Most Serious Problems, MSPs

facing taxpayers – part of Olson’s Annual Report to Congress. A copy of the executive summary of the Annual Report is available in TAP Space for the members’ review.

### **Approval of Minutes**

The meeting minutes for January’s teleconference were approved for posting by the full committee.

### **Chair Comments**

Sykes welcomed the members; he had a brief discussion about his visit to a Taxpayer Assistance Center which was arranged by his Local Taxpayer Advocate in Wichita, KS. He mentioned that the TAC was much more regimented than he had expected. He made one observation that there was not an adequate supply of tax forms available to the public; otherwise he was very impressed with their level of service.

### **TAC Questions**

Fisher reviewed the TAC Questionnaire with the full committee and came up with some suggestions to improve the questions. The suggested changes will be sent to the analyst of the committee who will send it to Momon – Townsend subsequently. Morizio added that if members are unable to arrange visits through their LTAs in their home state, they should contact analyst Jenkins with a list of the TACs they wish to visit. Both Momon – Townsend and Morizio mentioned that these visits will be coordinated and scheduled by the TAC Staff.

### **Screening Report**

Fisher reported on the status of four issues:

#### *Issue 26305 – Freedom Information Act*

This issue is a duplicate that was worked by Systemic Advocacy and it was determined that TIGTA is the appropriate venue for this issue. This issue is now closed and will be associated with the other issues.

#### *Issue 26279 – Forms not being mailed*

There were several issues worked on by Systemic Advocacy and it was determined that there are several other options to obtain forms. The National Taxpayer Advocacy is aware and is also monitoring this process. The TAC Project Committee will keep this issue in the Publicity Subcommittee.

#### *Issue 26296 – Training Agents on the Power Of Attorney process*

A Task Force (22514 – CAF and POA Flaws) has been developed to work on this issue. The TAC Project Committee will check with Tax Forms and Pubs Project Committee to see if this fits into their scope or will send this issue to the Toll-Free Project Committee.

#### *Issue 26179 – Individual Taxpayer Identification Numbers*

TIGTA and NTA have already addressed this issue. It has been included in the NTA Most Serious Problems. Aliens are no longer required to produce original documents.

### **Program Owners**

D’eredita welcomed everyone but stated that she did not have anything new to report on.



## **Subcommittee Report Out**

### **Wait Time**

Goldfarb provided feedback on his subcommittee's work. He stated that cash payments are not be accepted at local offices. Cash payments should be kept as an accommodation. He also mentioned that the subcommittee should study the size and nature of the problem. With respect to using volunteers, Goldfarb mentioned that there can be union opposition to volunteers performing tasks that local office personnel do.

### **Publicity/ Marketing**

Dosdall mentioned her subcommittee met last month and that she wants to touch base with each subcommittee member. Dosdall will have something to present at the next teleconference in March.

### **Outreach**

Janci mentioned that for the month of December, there were 7 members who submitted outreach reports with an audience of 398 participants. For the month of January, there were 17 outreach events with a total audience of 2,507 from various channels. Janci will contact those members who have not submitted outreach activities to Fields; he will also remind members that their reports are due to Analyst Fields on the second of each month.

### **Closing**

Sykes thanked all for joining the call. The next teleconference is scheduled for March 12 2013 at 2 p.m. EST.



**Taxpayer Assistance Center (TAC) Improvements Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
January 8, 2013**

**Designated Federal Official (DFO)**

- Morizio, Louis

**Members Present**

- Dosdall, Patricia
- Fisher, Aileen
- Fitzgerald, Annette
- Goldberg, Allan
- Goldfarb, Eugene
- Gross, Robert
- Janci, Gerald
- Phillips, Robert
- Piard, Alphonse
- Silva, Michael
- Smith, Toni
- Sykes, Edward

**Members Absent**

- Baldwin, Barbara

**Staff Present- TAP/TAS**

- Babb, Rose A. – Management Assistant
- Boyd, Laura – Program Analyst (Absent)
- Jenkins, Audrey – Program Analyst
- Powers, Donna – Program Analyst

**Program Owners**

- Albee, Amy – Supervisor, Tax Advisory
- D'eredita, Tina – W&I
- Braddock, Beth – W & I

**Public Participants**

- None

**Welcome/Announcements**

Morizio opened the meeting and welcomed everyone. He stated that the Annual Report to Congress was released. A web link will be provided via TAP Space to all panel members to access the report. Members were reminded to continue with their outreach efforts. Members should contact Morizio to get approval prior to local travel for outreach activities. At this time, TAP cannot approve any overnight outreach activities.



Morizio directed members' attention to a thank you email sent out to all panel members by Tiffany Todaro, former TAP Acting Director. He stated that he will be the Acting Director for TAP until January 27, 2013. After that date, there will be someone else assigned as the Acting Director until the position is permanently filled.

### **Approval of Minutes**

The meeting minutes from the Face to Face meeting in Plantation, Florida were reviewed with some minor edits; it was approved for posting by the full committee.

### **Chair Comments**

Sykes welcomed the members to the first teleconference of the year. He discussed the subcommittee assignments and how they will be worked by the members. There was a discussion regarding members visiting the TAC locations of Virtual Service Delivery (VSD) to test their performance for the public. Sykes mentioned that he asked his local taxpayer advocate in the state of Wichita, KS to assist in setting this up.

D'eredita suggested as well that the manager of the VSD, TAC Centers be made aware of prospective visits from panel members. This also enables the managers to reach out and set this up as a formal visit with other IRS Staff members at the respective locations. D'eredita did not have anything new, but mentioned that she likes the question and answer and the discussions. She mentioned that Amy Albee, Tax Advisory Supervisor- Wage and Investment will be off her detail in the coming weeks. Beth Braddock will be rejoining the calls to provide assistance to the TAC Committee

### **Subcommittee Report Out**

#### **Wait Time**

Goldfarb mentioned that his subcommittee will be following up to see if there is anything specific to do with respect to minimizing the wait time for taxpayers' services. In addition, he mentioned that he needs to know more on how IRS works. This subcommittee meets the first Tuesday of each month at 11:00 a.m. to 12:00 p.m. EST.

#### **Publicity/ Marketing**

Dosdall mentioned her subcommittee's assignments; this subcommittee meets the first Tuesday of each month from 12:00 p.m. to 1:00 p.m. EST.

### **Outreach**

Fields mentioned that there were 19 outreach events with a total audience of 286 for December 2012. Some additional outreach reports were submitted subsequent to January 4, 2013. The outreach report will be posted to TAPSpace each month for members to view. Fitzgerald mentioned that this is a good time to contact their local taxpayer advocate to partner with and make presentations at various events. She also mentioned that members should take a look at the templates from TAPSpace. Members should think about outreach via their local newspapers and on local radio stations.

**Powers made the following announcements:**

- Baldwin, Dosdall, Gross and Silva must review their selections in TAPSpace – make TAC their committee in order to receive notifications via email.
- Dosdall needs to complete her biography in TAPSpace.
- Piard must review his Spam folder for TAP's email with link to TAPSpace.
- Fisher, Baldwin, and Goldberg will set up a time for the screening committee to meet next week.
- SBSE Calendars were mailed to all members; Speak Up brochures will be mailed out soon. Publication 910 Free Tax Service was ordered and will be sent out when it is available.
- Mentors should have made contact with their mentees already.
- TAC Survey – 2012 will be sent out to members.
- James and Piard will be contacted by Powers to discuss the face to face meeting.

As of January 28, 2013, Powers will be going on a Detail in Systemic Advocacy for 60 days. Analyst, Audrey Jenkins will be the analyst for the TAC Project Committee until Powers returns.

**Closing**

Sykes thanked all for joining the teleconference. The next teleconference is scheduled for February 12, 2013 at 2 p.m. EST.



**Taxpayer Advocacy Panel (TAP)  
Taxpayer Assistance Center (TAC) Improvements Project Committee  
Meeting Minutes  
December 6 – 7, 2012**

**Designated Federal Official (DFO)**

- Steve Berkey, DFO

**Members Present**

- Baldwin, Barbara
- Dosdall, Patricia
- Fisher, Aileen
- Fitzgerald, Annette
- Goldberg, Allan
- Goldfarb, Eugene
- Gross, Robert
- Janci, Gerald
- Phillips, Robert
- Silva, Michael
- Smith, Toni
- Sykes, Edward

**Members Absent**

- Doty, James
- Piard, Alphonse

**Staff Present – TAP/TAS**

- Boyd, Laura – Program Analyst
- Mezger, Bill – TAS Portfolio Manager
- Powers, Donna – Program Analyst

**Program Owners**

- D'eredita, Tina – W&I
- Albee, Amy – Supervisor, Tax Advisory

**Public Participants**

- None

**Welcome/Announcements**

Steve Berkey opened the meeting and welcomed everyone to the meeting.

**Self-Introductions**

The group went around the room, introduced themselves and gave a brief recap of their volunteer experience.



## **Approval of Minutes**

The meeting minutes for November were reviewed and approved.

## **Elections**

Berkey directed the committee to look at Chapter 8 of the Volunteer Handbook, which discusses the leadership of TAP. He also summarized what the duties of a Chair and Vice-Chair are. The following people volunteered for chair: Jerry Janci, Aileen Fisher, Ed Sykes, and Patricia Dosdall. The following people volunteered for vice-chair: Jerry Janci and Patricia Dosdall (if not selected for chair). Each nominee had the opportunity to give a speech

Ed Sykes was selected as Chair.

Jerry Janci was selected as Vice-Chair.

## **Wage and Investment**

Michael Beebee, called into the meeting to introduce himself and welcomed the members of the committee.

Beebee mentioned that ITIN applications for dependents will have the new requirement. The dependent will be required to be present so an IRS employee can certify the application.

Beebee informed everyone that Virtual Service Delivery machines will be located in alternate locations (such as churches, library). The reason for this is to reach taxpayers that are not able to visit a Taxpayer Assistance Center because it is too far away for them to travel.

## **Outreach**

Powers informed everyone that the Vice-Chair is responsible for encouraging the committee to do outreach and to ensure that each member of the committee send their outreach report to the Analyst.

## **Screening Team**

The following members will be the Screening Team:

- Aileen Fisher
- Allen Goldberg
- Barbara Baldwin

## **Internal TAP Communications Committee**

Patricia Dosdall will be this committee's representative on the TAP Communications Committee.

## **Quality Review**

The following members will be the Quality Review Team:

- Patricia Dosdall
- Eugene Goldfarb



### **Joint Committee Quality Review**

Aileen Fisher will be the QR representative on the Joint Committee team.

### **Mentoring Program**

#### **Mentees:**

Patricia Dosdall  
James Doty  
Eugene Goldfarb  
Alphonse Piard  
Robert Phillips

#### **Mentors:**

Aileen Fisher  
Toni Smith  
Robert Gross  
Allen Goldberg  
Annette Fitzgerald

### **TAP Member Procedures**

Ground Rules were reviewed.

Telephone & E-Mail Etiquette were reviewed.

#### **Agenda & Pre-Read Information (Tap Space)**

TapSpace – members will be getting information on TapSpace passwords, etc. Members should go in as soon as possible to update their bio information, and add the committees, etc.

#### **Methods of Communication**

Powers informed everyone that the methods of communication were TapSpace, email, telephone, and conference call.

#### **Establish Conference Call Meeting Dates**

The members reached consensus on meeting every second Tuesday at 2 p.m. ET. The first meeting is on January 8, 2013 at 2 p.m. ET.

#### **Establish New Meeting Quorum**

The members reached consensus on a quorum of 50% plus one. This committee has 14 members, so quorum is 8.

Powers clarified the definition of Consensus.

Powers asked everyone to sign and turn in their Volunteer Ethics Agreement and Position Description.

### **Travel Procedures**

Fields gave a short presentation on the travel procedures, and passed out the travel vouchers.

### **Outreach**

Fields gave a presentation on Outreach, and discussed the importance of the monthly report.



Powers informed everyone that although there are outreach materials available, we cannot pass it out to the public until authorization is granted. She did show everyone what leftover materials are in stock.

### **Review of 2012 Recommendations**

Powers and D'eredita reviewed the 2012 recommendations for TAC.

### **Introduction to Projects for 2013**

Face-to-face assistance is essential to effective tax administration. Certain segments of the taxpaying population will always require face-to-face assistance. The Taxpayer Advocacy Panel (TAP) would like to partner with the Internal Revenue Service (IRS) to provide input from the taxpayer's perspective on improving services and the customer's experience at TAC offices.

The 2013 TAC Committee will focus on two main areas. After discussion with the W & I Program Owner, it is apparent that the Field Assistance main focus continues to be alternative methods of reaching the IRS, without physically going into a TAC. One avenue is to promote irs.gov and/or other manners of service, looking at how the IRS information is advertised. The TAC will look at better ways to market irs.gov.

Secondly, the majority of any issues coming into the TACs are related to wait times. The one way to remedy the wait time in lieu of hiring is to divert the traffic to other alternative methods for those tasks that can be handled in another fashion. The TAC Committee will continue to look at how to promote payment kiosks or market the alternative payment methods.

### **Systemic Advocacy**

Laura Boyd made a presentation on the overview of the office of Systemic Advocacy via speaker phone and Power point. She tied in the Most Serious Problems TACs are facing with the committee's work.

### **Project Committee Work**

The committee decided to have two subcommittees, Marketing/Publicity and Wait Time Issues. The subcommittee members are:

#### **Subcommittee – Wait Time**

Gene Goldfarb (Lead)  
Barbara Baldwin  
Bob Gross  
Toni Smith  
Robert Phillips  
Ed Sykes  
James Doty

#### **Subcommittee – Publicity/Marketing**

Pat Dosdall (Lead)  
Annette FitzGerald  
Mike Silva  
Aileen Fisher  
Allen Goldberg  
Alphonse Piard  
Jerry Janci





## **Meeting Assessment/Round Table/Closing**

### **Day Two of TAC Face-to-Face Meeting December 7, 2012**

#### **Welcome/Announcements**

The new chair Ed Sykes welcomed everyone back to the meeting. Due to illness, he turned the meeting over to the Vice Chair Jerry Janci.

#### **TAC Assistance Center Visit**

The W & I, Field Assistant Chief, Policy, Technology and Measures, Tina D'eredita was in attendance at the meeting and was invaluable in answering the questions directed to her. Christine Cooley, W&I, Area 3, Acting Territory 1 Manager also attended part of the meeting to answer questions and provide information on the walk in center operations. Cooley and her staff arranged a before hours tour of the local TAC office and the staff members provided an overview of their services, as well as discussing the problems the TACs were facing. The panel agreed this provided much needed background information for the committee. Some of the panel members had never been to a TAC office.

#### **Project Committee Work**

Both subcommittees began discussing and working on their issues.

#### **Closing**

Each member gave brief remarks concerning the meeting. All agreed the face to face meeting was helpful in receiving valuable training, forming teams and working issues.

**These minutes were voted on and accepted by the full committee on January 8, 2013.**