

2019 Current Fiscal Year Report: IRS Taxpayer Advocacy Panel

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1. Department or Agency

Department of the Treasury

2. Fiscal Year

2019

3. Committee or Subcommittee

IRS Taxpayer Advocacy Panel

3b. GSA Committee No.

5217

4. Is this New During Fiscal Year?

No

5. Current Charter

02/27/2018

6. Expected Renewal Date

02/27/2020

7. Expected Term Date

8a. Was Terminated During Fiscal Year?

No

8b. Specific Termination Authority

8c. Actual Term Date

9. Agency Recommendation for Next Fiscal Year

Continue

10a. Legislation Req to Terminate?

No

10b. Legislation Pending?

Not Applicable

11. Establishment Authority Agency Authority

12. Specific Establishment Authority

Agency Decision

13. Effective Date

10/10/1997

14. Committee Type

Continuing

14c. Presidential?

No

15. Description of Committee Non Scientific Program Advisory Board

16a. Total Number of Reports

No Reports for this Fiscal Year

17a. Open Meetings 19 17b. Closed Meetings 0 17c. Partially Closed Meetings 0 17d. Total Meetings 19

Meetings and Dates

Purpose	Start	End
Toll Free Project Committee Meeting	10/09/2018	- 10/09/2018
Tax Forms & Publications Project Committee	10/10/2018	- 10/10/2018
Notices & Correspondence Project Committee Meeting	10/11/2018	- 10/11/2018
Taxpayer Communications Committee Monthly Meeting	10/16/2018	- 10/16/2018
Taxpayer Assistance Center Committee Monthly Meeting	10/16/2018	- 10/16/2018
Special Projects Committee Monthly Meeting	10/17/2018	- 10/17/2018
Joint Committee Meeting	10/25/2018	- 10/25/2018
Tax Forms and Publications Project Committee Face to Face Meeting	03/18/2019	- 03/20/2019
Special Projects Face to Face Meeting	03/18/2019	- 03/20/2019
Toll Free Project Face to Face Meeting	03/20/2019	- 03/22/2019
Toll Free Project Committee Meeting	04/10/2019	- 04/10/2019
Tax Forms and Publications Project Committee Meeting	04/10/2019	- 04/10/2019
Special Projects Committee Meeting	04/11/2019	- 04/11/2019
Toll Free Project Committee Meeting	05/08/2019	- 05/08/2019
Tax Forms and Publications Project Committee Meeting	05/08/2019	- 05/08/2019
Special Project Committee	05/09/2019	- 05/09/2019
Tax Forms and Publications Project Committee Meeting	06/05/2019	- 06/12/2019
Toll Free Project Committee Meeting	06/12/2019	- 06/12/2019
Special Projects Committee Meeting	06/13/2019	- 06/13/2019

Number of Committee Meetings Listed: 19

	Current FY	Next FY
18a(1). Personnel Pmts to Non-Federal Members	\$0.00	\$0.00
18a(2). Personnel Pmts to Federal Members	\$0.00	\$0.00
18a(3). Personnel Pmts to Federal Staff	\$0.00	\$0.00
18a(4). Personnel Pmts to Non-Member Consultants	\$0.00	\$0.00
18b(1). Travel and Per Diem to Non-Federal Members	\$0.00	\$0.00
18b(2). Travel and Per Diem to Federal Members	\$0.00	\$0.00
18b(3). Travel and Per Diem to Federal Staff	\$0.00	\$0.00
18b(4). Travel and Per Diem to Non-member Consultants	\$0.00	\$0.00
18c. Other(rents,user charges, graphics, printing, mail, etc.)	\$0.00	\$0.00
18d. Total	\$0.00	\$0.00
19. Federal Staff Support Years (FTE)	0.00	0.00

20a. How does the Committee accomplish its purpose?

The mission of the Taxpayer Advocacy Panel (TAP) is to listen to taxpayers, identify taxpayers' issues and make suggestions for improving IRS service and customer satisfaction. The TAP works with the Taxpayer Advocate Service (TAS) and the IRS Wage & Investment and Small Business/Self Employed operating divisions to identify strategic initiatives, products, or services that need or will benefit from citizen input. The operating divisions utilize TAP to gain pre-decisional input on products, services or strategic initiatives or key program changes that impact taxpayers. The TAP works on topical projects and identifies and analyzes grass-root level issues received from taxpayers and elevates them to the IRS with recommendations for improvement. The focus of the TAP is identifying and working on service-wide issues. This aligns with the modernized IRS organization, which has moved to a more service-wide program focus. The TAP solicited and received direct taxpayer input through their committee web site, dedicated toll-free telephone line, member outreach and open meetings. The TAP has direct access to IRS operating divisions and the National Taxpayer Advocate. IRS liaisons serve as the TAP's link to the Operating Divisions.

20b. How does the Committee balance its membership?

The Panel is demographically balanced with representation from each state, the District of Columbia, Puerto Rico and internationally. Recruitment strategies are designed to attract a diverse population. Efforts are made to balance the Panel by gender, ethnicity, socio-economic status and occupations ensuring representation from both wage earners and those who are self-employed. In an effort to maintain this balance and to ensure continuity, Panel members are appointed to staggered three-year terms with approximately one-third of the members being replaced annually.

20c. How frequent and relevant are the Committee Meetings?

Frequency: The Panel committees meet monthly via conference call. In addition, each committee has one face-to-face meeting annually, budget permitting. Relevance: Since there is a continuing need for taxpayer input on improving IRS service and customer satisfaction, the Panel serves as an advisory body to the IRS. As mentioned previously, the Panel provides a citizen voice regarding tax administration. The members have provided valuable input on a variety of issues facing the IRS such as IRS Future State, Taxpayer Assistance Centers, Toll-Free assistance, various tax forms and publications and IRS Notices and Correspondence.

20d. Why can't the advice or information this committee provides be obtained elsewhere?

The Panel is comprised of citizens from all walks of life, ethnically diverse, and each state has at least one representative. There are other groups such as tax attorneys; accountants and enrolled agents that are able to communicate with the IRS through their professional associations or other advisory committees. These groups provide valuable input and insight to tax administration but they are one perspective. The average citizen does not have a collective voice to communicate with the IRS. The Taxpayer Advocacy Panel fills that void. The Panel is structured so that individual panel members can raise grassroots issues from citizens to the IRS. Panel members are also part of committees working with various IRS operating divisions to address problems that affect the average taxpayer. Some of the issues being addressed by these committees are, Taxpayer Assistance Centers, Forms & Publications, Notices, Toll-Free lines, and Taxpayer Communications. The perspective these citizens bring could not be gained through any other means and is essential to improving IRS products and services and reducing the burden for America's taxpayers.

20e. Why is it necessary to close and/or partially closed committee meetings?

N/A.

21. Remarks

The mission of the Taxpayer Advocacy Panel (TAP) is to listen to taxpayers, identify taxpayers' issues, and make suggestions for improving IRS service and customer satisfaction. The Panel is comprised of citizens from all walks of life, demographically diverse with each state, the District of Columbia and the Territory of Puerto Rico having at least one representative. Beginning with the start of TAP 2012 year, the panel was divided into six Project Committees working with IRS program owners on specific issues that potentially affect all taxpayers. The projects were jointly identified by the IRS operating divisions based on strategic objectives and TAP Joint Committee based on grass-roots

issues. The recommendations that arise from the committees aid in improving IRS customer service and reducing taxpayer burden. The Project Committees were: • Taxpayer Communications Committee • Notices and Correspondence Committee • Tax Forms and Publications Committee • Taxpayer Assistance Centers Committee • Toll Free Committee • Special Projects Committee The Chairs of each committee along with the TAP Chair and Vice-Chair make up the TAP Joint Committee which acts on behalf of all TAP members to advance the TAP mission. TAP will continue to operate using the six committees structure.

Designated Federal Officer

Terrie English Director, Taxpayer Advocacy Panel

Committee Members	Start	End	Occupation	Member Designation
Ai, Lin	02/08/2019	11/30/2021	Project Production Controller	Representative Member
Ai, Lin	02/08/2019	11/30/2021	Project Production Controller	Representative Member
Anthony, Patricia	02/08/2019	11/30/2021	Retired USDOJ, Federal Bureau of Prisons	Representative Member
Azzaro, Alice	02/08/2017	11/30/2019	Management Accounting and Payroll Solutions	Representative Member
Bemis, Ellen	01/28/2016	11/30/2018	Aroostook County Action Program	Representative Member
Berlage, Paul	02/08/2019	11/30/2021	Self Employed	Representative Member
Bolin, Tim	12/01/2015	11/30/2018	McCormick JH Cheyenne, WY	Representative Member
Bowser, Shani	02/08/2019	11/30/2021	Senior Risk Analyst	Representative Member
Brookens, Michelle	02/08/2017	11/30/2019	Land of Lincoln Workforce Alliance	Representative Member
Brooks, Courtney	02/08/2019	11/30/2021	Workforce Specialist	Representative Member
Brown, Hodari	02/08/2019	11/30/2021	U.S. Small Business Administration Michigan District Office	Representative Member
Bunner, Tracy	12/01/2017	11/30/2020	H&R Block	Representative Member
Burrows, Alyssa	02/08/2017	11/30/2019	Navient, PA Army National Guard	Representative Member
Campbell, Sheila	12/01/2017	11/30/2020	ICC Enterprises, LLC	Representative Member
Clark-Robinson, Kimberly	12/01/2017	11/30/2020	Christiana Chrstiana Care Hospital System	Representative Member
Davis, Kathy	12/01/2015	11/30/2018	Department of Agriculture	Representative Member
Dixson, Felecia	02/08/2019	11/30/2021	Owner/Shareholder	Representative Member
Doak, Penny	02/03/2016	11/30/2018	US Bank Trust Officer	Representative Member
Dorsey, Tasheka	02/08/2017	11/30/2019	Blue Cross Blue Shield of Louisiana	Representative Member
Fitzherbert, Ronald	02/08/2019	11/30/2021	Risk Manager & Compliance Officer	Representative Member

Flakes, Terrill	02/13/2019	11/30/2021	Clinical Data Support Analyst	Representative Member
Florence, Mary	01/11/2016	11/30/2018	Daystar West Consulting	Representative Member
Folta, Bradford	02/08/2019	11/30/2021	Owner/Geoscientist	Representative Member
Frausto, Victor	06/03/2016	11/30/2018	Retired	Representative Member
Gati, Michael	02/08/2019	11/30/2021	Criminal Investigator	Representative Member
Gray, Gina	02/08/2019	11/30/2021	Executive Vice President	Representative Member
Groff, Matthew	02/08/2019	11/30/2021	Firm Administrator & Paralegal	Representative Member
Hall, Scott	01/11/2016	11/30/2018	Revenue Manager	Representative Member
Hauer, Kathryn	02/08/2019	11/30/2021	Financial Literacy Educator; Certified Financial Planner	Representative Member
Haynie, Licia	02/08/2019	11/30/2021	Contract Specialist	Representative Member
Herman, Richard	02/08/2017	11/30/2019	Comcast	Representative Member
Hirschfeld, Heidi	02/08/2017	11/30/2019	St. John's University	Representative Member
Hoff, Gary	01/11/2016	11/30/2018	Retired	Representative Member
Hoffman, Holly	01/11/2016	11/30/2018	Wisconsin Dept of Revenue	Representative Member
Holley, Joseph	02/08/2017	10/31/2018	JABO Supply Corporation	Representative Member
Horton, Felicia	12/01/2015	11/30/2018	Advanced Correctional Healthcare	Representative Member
Hower, Angel	02/08/2017	11/30/2019	Businessolver, Inc	Representative Member
Hughes, John	02/08/2019	11/30/2021	Senior Associate Technology Recruiter	Representative Member
Hunter, Jeri	02/08/2017	11/30/2019	Self Employed Accounting, Bookkeeping	Representative Member
Hutchins, Micoya	12/01/2015	11/30/2018	Attorney	Representative Member
Illickal, Manoj	02/08/2017	11/30/2019	Professor	Representative Member
Johnson, Ryan	12/01/2017	10/15/2018	Ohio Army National Guard	Representative Member
Jones, David	12/01/2015	11/30/2018	AARP	Representative Member
Kasal, Millicent	02/08/2017	11/30/2019	Minnesota Information Technology Services	Representative Member
Kleiber, Phillip	12/01/2017	11/30/2020	The Coca-Cola Company (retired)	Representative Member
Kurth, Paul	01/11/2016	11/30/2018	Director Tax Clinic	Representative Member
Kusiak, Patrick	12/01/2017	11/30/2020	State of California-Franchise Tax Board-Legal Division	Representative Member
Manasa, Harold	02/21/2017	11/30/2019	PwC, Clemson Univ., Saudi Aramco	Representative Member
Martin, Joseph	02/08/2017	11/30/2019	Low Income Tax Clinic; Legal Services	Representative Member

Mason, Kimberly	02/08/2017	11/30/2019	Financial Director	Representative Member
Mason, William	01/11/2016	11/30/2018	Attorney	Representative Member
Medina, Loren	02/21/2017	11/30/2019	Buyer	Representative Member
Moretti, Robert	02/08/2019	11/30/2021	School Board Trustee/Deputy Civil Engineer/Adjunct College	Representative Member
Mosely, Tiffany	12/01/2017	11/30/2020	Tax Defense Partners, LLC (TDP)	Representative Member
Nelson, Diana	01/11/2016	11/30/2018	Chief Financial Officer/Owner	Representative Member
Oliver, Zanobia	02/21/2017	11/30/2019	Liberty Tax Service	Representative Member
Olsen, Sheila	01/11/2016	11/30/2018	Retired US Army	Representative Member
Peterson, Bernard	12/01/2017	11/30/2020	Capital Markets	Representative Member
Peterson, Kristen	02/08/2017	11/30/2019	University of Colorado	Representative Member
Pierre, Kimberly	02/08/2017	11/30/2019	HBU/GCU	Representative Member
Pinkney, Cynthia	02/08/2019	11/30/2021	Attorney	Representative Member
Price, Andrea	02/08/2019	11/30/2021	Healthcare Strategic Advisor	Representative Member
Rice, Lacy	02/08/2019	11/30/2021	President/Executive Director, Talent Pushers, Inc.	Representative Member
Sabio, Robin	12/01/2017	11/30/2020	Federal Deposit Insurance Corporation	Representative Member
Sachs, Kathy	01/16/2018	11/30/2020	State of Kansas	Representative Member
Sampson, Joseph	12/01/2017	11/30/2020	TMX Finance	Representative Member
Scott, Bryon	12/01/2017	11/30/2020	Federal Deposit Insurance Corporation	Representative Member
Selden, Stephen	12/01/2017	11/30/2020	Oneida Indian Nation	Representative Member
Shamgochian, Michael	12/01/2017	11/30/2020	Worcester State University	Representative Member
Smith, April	12/01/2017	11/30/2020	Department of Veteran Affairs Health Administration	Representative Member
Smith, Emmanuel	02/08/2019	11/30/2021	Partnership Spc	Representative Member
Smith, Leonard	02/08/2019	11/30/2021	Manager-Contract Compliance/Small Business Liaison	Representative Member
Smith, Leonard	02/08/2019	11/30/2021	Manager-Contract Compliance/Small Business Liaison	Representative Member
Smith, Thurston	12/01/2017	11/30/2020	Veterans Health Administration	Representative Member
Smolnik, Dan	02/08/2017	11/30/2019	Smolnik Law Offices	Representative Member
Snyder, Laura	02/08/2019	11/30/2021	Attorney (admitted New York and Illinois)	Representative Member
Snyder, Laura	02/08/2019	11/30/2021	Attorney (admitted New York and Illinois)	Representative Member
Sowell, James	02/08/2017	11/30/2019	Self Employed Finance	Representative Member

Stratton, Bruce	12/01/2017	11/30/2020	Stratton & Associates PLLC Partner / C.P.A.	Representative Member
Tessmer, April	12/01/2017	11/30/2020	U.S. Army Reserves/U.S. Army	Representative Member
Townsend, Patrick	02/08/2019	11/30/2021	Self-employed/sole proprietor of TNT Tax Solutions, LLC	Representative Member
Tracy, Kathryn	12/01/2017	11/30/2020	Kat & Bud Enterprises, LLC	Representative Member
Tsujimura, Ruth	12/01/2015	11/30/2018	Ass. VP for Legal Affairs and Deputy University	Representative Member
Vanderver, Stephen	12/01/2017	11/30/2020	US Air Force	Representative Member
Walrond, Carmela	12/01/2017	11/30/2020	Spar and Bernstein, PC	Representative Member
Weeks, Juliana	04/27/2016	11/30/2019	Healthnet Federal Services, Western Governor's University / US Air Force	Representative Member
Wennermark, Susan	01/11/2016	11/30/2018	Owner/Tax Professional	Representative Member
Whitemarsh, Anthony	02/08/2019	11/30/2021	Owner, Certified Real Estate Appraiser	Representative Member
Williams, Cheryl	01/09/2018	09/30/2020	Intuit	Representative Member

Number of Committee Members Listed: 89

Narrative Description

The TAP supports the mission of providing America's taxpayers with top quality service and helping them understand and meet their tax responsibilities by providing a taxpayer perspective to the IRS on critical tax administration programs. It does this by submitting recommendations to the IRS to address grass-root issues received from taxpayers. Prior to submission issues are prioritized, researched, documented and ultimately raised to the program owners for consideration. TAP members also work with IRS program owners on assigned tasks or projects and present recommendations for consideration. These processes directly support the mission and strategic plan of the IRS. The committee's operating procedures changed for the 2012 TAP year with the elimination of Area committees working individual issues.

What are the most significant program outcomes associated with this committee?

Checked if Applies

- Improvements to health or safety
- Trust in government
- Major policy changes
- Advance in scientific research
- Effective grant making
- Improved service delivery
- Increased customer satisfaction

- Implementation of laws or regulatory requirements
- Other

Outcome Comments

NA

What are the cost savings associated with this committee?

Checked if Applies

- None
- Unable to Determine
- Under \$100,000
- \$100,000 - \$500,000
- \$500,001 - \$1,000,000
- \$1,000,001 - \$5,000,000
- \$5,000,001 - \$10,000,000
- Over \$10,000,000
- Cost Savings Other

Cost Savings Comments

While actual dollar savings have not been determined, the program places emphasis on improving customer service, increasing satisfaction, and reducing taxpayer burden. The TAP recommendations encourage the IRS to take actions to improve these areas in the most cost efficient manner. While cost savings for taxpayers or the government is not a concrete figure, we continue to explore measures to assess the value of the panel's recommendations to the IRS and taxpayers.

What is the approximate Number of recommendations produced by this committee for the life of the committee?

1,631

Number of Recommendations Comments

For recommendation purposes the TAP operates on a calendar year ending in December, not a fiscal year. Since the 2018 TAP year is not complete when the FACA database reports for FY 2018 are due, the report includes recommendations through December 2017, which is the most current TAP year data available. This is consistent with the TAP Annual Report for 2017 which is the last report available at the time the FACA reports are closed for FY 2018. From its creation in 2002, TAP has forwarded a total of 1631 recommendations to the IRS. The IRS seriously considers the TAP recommendations, however at times it is limited in its ability to implement them due to the cost of

implementation, legislative or regulatory restrictions, a difference on philosophy or the honest trade-off between easing the taxpayer's burden to understand and meet their tax responsibilities while efficiently collecting the proper tax revenues owed. Information on these recommendations is contained in the TAP Annual Reports. You can find the detailed reports of TAP's accomplishments on the TAP website.

What is the approximate Percentage of these recommendations that have been or will be Fully implemented by the agency?

18%

% of Recommendations Fully Implemented Comments

This calculation includes responses from IRS indicating the recommendation has been accepted or implemented. Until 2011 the TAP did not have a system in place to follow up on the recommendations accepted or partially accepted by the IRS to determine if they were implemented. The majority of the accepted recommendations were elevated to the IRS from Area committees via the formal recommendation elevation process. Note: Project committees provide input from TAP members to IRS program owners on projects, products or services assigned to the committee. This process provides immediate input to the IRS for consideration. Since TAP may be one of many stakeholders, IRS often considered TAP's recommendations without providing a formal acceptance or rejection. Approximately 25 percent of TAP's recommendations would fall into this category in which TAP's recommendations were considered by the IRS but a determination of the outcome attributed to the TAP recommendation is not known.

What is the approximate Percentage of these recommendations that have been or will be Partially implemented by the agency?

12%

% of Recommendations Partially Implemented Comments

This calculation includes responses from the IRS indicating the recommendation has been partially accepted. This includes recommendations consisting of more than one suggestion of which not all were accepted. As stated regarding the percentage of recommendations fully implemented, the ultimate determination of the outcome attributed to the TAP recommendation may not be known for all TAP recommendations.

Does the agency provide the committee with feedback regarding actions taken to implement recommendations or advice offered?

Yes No Not Applicable

Agency Feedback Comments

The agency continues to provide feedback through both oral and written communications. In 2010 the TAP added response comments and accepted/rejected fields to the TAP Recommendation Referral Form to make it easier for the IRS to provide feedback on TAP recommendations.

What other actions has the agency taken as a result of the committee's advice or recommendation?

	Checked if Applies
Reorganized Priorities	<input checked="" type="checkbox"/>
Reallocated resources	<input checked="" type="checkbox"/>
Issued new regulation	<input checked="" type="checkbox"/>
Proposed legislation	<input type="checkbox"/>
Approved grants or other payments	<input type="checkbox"/>
Other	<input checked="" type="checkbox"/>

Action Comments

The agency has taken action based on input and recommendations from the TAP in various ways. Most of the IRS actions taken in response to TAP's recommendations relate to improved tax products, forms, publications, notices and correspondence.

Is the Committee engaged in the review of applications for grants?

No

Grant Review Comments

NA

How is access provided to the information for the Committee's documentation?

	Checked if Applies
Contact DFO	<input checked="" type="checkbox"/>
Online Agency Web Site	<input checked="" type="checkbox"/>
Online Committee Web Site	<input checked="" type="checkbox"/>
Online GSA FACA Web Site	<input checked="" type="checkbox"/>
Publications	<input checked="" type="checkbox"/>
Other	<input checked="" type="checkbox"/>

Access Comments

Toll-Free phone line 1-888-912-1227