



**Special Projects
Taxpayer Advocacy Panel (TAP)
Monthly Meeting Minutes
Wednesday, June 8, 2022**

Designated Federal Officer (DFO)

- Cedric Jeans TAP East Chief

Attendance

- | | | |
|-------------------|----------------------|--------------------|
| • Michael Avery | San Juan, PR | Member |
| • Laurie Brock | Eugene, OR | Chair |
| • Aisha Earle | Alpharetta, GA | Member |
| • Kimberly fox | Panama City, FL | Member |
| • Rita Green | Memphis, TN | Member |
| • Susan LaBudde | Fox Point, WI | Member (Absent) |
| • Rebecca Lammers | International/London | Member |
| • CJ Mills | Glenside, PA | Member |
| • Donna Patterson | Bothell, WA | Vice-Chair |
| • Rene Tiongquico | Washington, D.C. | Member (Absent) |
| • Martha Lewis | Visiting | TAP National Chair |

Staff

- | | |
|--------------------------|--------------------------------------|
| • Kevin Brown | Administrative Assistant |
| • Terrie English | TAP Director |
| • Robert Rosalia | TAP Program Analyst |
| • Antoinette “Toni” Ross | TAP Program Analyst |
| • Fred Smith | TAP Program Analyst |
| • Suzanne Henderson | Tax Analyst Wage & Investments (W&I) |
| • Octavia Johnson | Program Analyst W&I |
| • Michael “Mike” Odom | Program Analyst W&I |
| • Schenita Thornton | Program Analyst W&I |

Welcome Announcements/Comments/Acknowledgements

Cedric Jeans welcomed all attendees and opened the meeting at 11:00am ET.

Roll Call

Quorum was met.

Members of the Public

None

Welcome/Announcements/Comments/Acknowledgement of Citizens

Brock welcomed everyone to the call. Patterson welcomed everyone to the call.

National Office Report

English welcomed members to join in the tax forums and encouraged members to accept invitations to outreach events with your Local Taxpayer Advocates (LTAs). English also reminded the committee to attend the TAP quarterly meeting where the National Taxpayer Advocate (NTA) will be speaking about a lot of issues that TAP has been working on. English reminded members that some of the issues that TAP works on can take years to be completed and adopted by the IRS. Because of this, members should be aware of how long their work can take but TAP still gets the credit eventually.

DFO Report

Jeans reminded the committee to review the June objectives report by the NTA, due to be released sometime this month. Jeans encouraged the committee to pay attention to this as we may be able to partner with TAS for some TAP issues. Talk to your LTA since they may have outreach events that members can attend to get public input on issues for TAP to work on.

Minutes Approval

May minutes had a correction to Rebecca Lammers comments on Issue 43807 regarding international taxpayers not being able to use the toll-free phone number meant for them to reach the IRS. Fox motioned; Lammers seconded.

Action: May minutes approved as corrected.

Outreach Report:

- Report out from the Outreach Meeting

Patterson reported the Outreach Committee is working on: social media outreach using animation and memes; outreach templates and tailor them to your audience; recruitment in underserved states; and internal outreach to members.

Patterson asked members to use the outreach toolkit. Patterson asked members to share outreach today so they can be shared with the outreach committee. Let Ross know if you want to attend the 2022 Tax Forums.

- Activity Reports

Activity reports are now completed on the www.tapspace.org. Patterson shared examples on how to complete this task. Brock added a reminder for members to include all work activities for TAP to include emails, calls, meetings, or research. In addition, Brock suggested adding reminders or place completing this task on your schedule to give yourself credit for TAP activities.

- TAP Newsletter (Future Newsletter Articles): Thanked Tiongquico for writing the May newsletter and asked for volunteers for June's newsletter article.

Chair Report Out

- Highlights of the Joint Committee (JC) Meeting



- Brock indicated there were no issues brought forward on the last JC meeting.
- Patterson will stand in for Brock on the June JC meeting.

IRS Responses:

- Issue 49525-Expand the Online Account

ID 2097 Recommended that an identifier be included with uploaded documents.

Mills motioned; Patterson seconded

Action: Response accepted

ID 2098 Already resolved. Brock motioned; Mills seconded

Action: Response accepted

ID 2099 Brock motioned; Mills seconded

Action: Response accepted

(The committee decided they want a timeline from IRS, so we know something is being done.)

ID 2100 Brock motioned; Mills seconded

Action: Response accepted

ID 2102

Brock indicated that there may be a new issue coming from this issue. Patterson reported that different phone applications may be an option to use these toll-free phone numbers and they may be free. Lammers will conduct the research trying to determine different options to resolve this issue and share it with the public. These calls can be very expensive for international taxpayers and should be resolved. Voice Over Internet Protocol (VoIP) update may be something the IRS considers implementing. Brock indicated this new issue will be setup for subcommittee 1.

Mills asked for an update to the rebuttal for ID 2095. Jeans indicated the rebuttal has not been sent to the IRS yet. Brock said this will be reviewed later.

- Issue 48702- Ensure Taxpayer Security When Using the IRS Free File Program

Fox indicated that using one of these programs was secure, but she did have to respond to an information usage request three times during this process, but the software is free for use otherwise. Brock motioned; Mills seconded

Action: Response accepted

- Issue 49802-Refund Payments to Couples

ID 2198- Mills motioned; Patterson seconded

ID 2197- Brock motioned; Patterson seconded



ID 2199 (Under consideration for implementation on January 30, 2023.)

Fox indicated Issue 43808 is also under consideration and they both should be reviewed in tandem. Fox motioned; Mills seconded

Action: Response accepted

- Issue 50545-Improve Where My Refund on IRS.gov

Mills recommended reviewing screened issues 19 and 27 from the March screening sheet in consideration with this issue. Patterson and Fox both agree that more research should be done for this issue. Issue tabled to next meeting. This issue will be assigned to subcommittee 2.

Subcommittee 1 Report

Fox reported:

- Project Referral Issue 51241-Form 1040-SS-U.S. Self-Employment Tax Return. (Referral Presented for approval to the Full Committee)

This recommendation is to extend access to this form 1040 SS, and have online access, to Puerto Rico and all US territories. Mills motioned; Patterson seconded

Action: Issue elevated to Joint Committee

- Project Proposal Issue 51824—Estate and Gift Tax Filing
- Issue 43808 (IRS Response Review)

Subcommittee 2 Report

- Project Referral Issue 51693—Estimated Tax Payments (Referral Presented for approval to the Full Committee)

Mills reported adding more justifications to allow taxpayers to make estimated tax payments using their own social security number and accurately credit the right taxpayer's account. Fox motioned; Brock seconded.

Action: Issue elevated to Joint Committee

- Issue 43867 (Second look at IRS Response)

Recommended this issue be closed as it includes two federal agencies and requires legislative action. Mills motioned; Brock seconded.

Action: Issue closed by committee

Internal Communications Committee Report Out

Tabled

Screening Report Out:

Tabled



Action Items

Toni Ross will do the following:

- May minutes posted.
- Issues 51241 and 51693 elevated to JC
- Ross and Lammers working review of possible new issue
- Subcommittee 2 to work issue 50545

Roundtable

Chair or Vice Chair of SP Committee Closing Comment

Brock thanked everyone for their time and participation.

Closing

Jeans closed the meeting at 12:02pm ET.

Next Meeting: July 13, 2022, at 11:00am ET

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