

**Joint Committee (JC)  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
October 27, 2022**

**Designated Federal Official (DFO)**

- Terrie English TAP Director

**Members Present**

- Laurie Brock Chair, Special Projects Committee
- Charles Jones Chair, Notices and Correspondence Committee
- Martha Lewis National TAP Chair
- Eugene “Gene” Lillie National TAP Vice-Chair
- Angela Madison Chair, Internal Communications Committee
- Richard “Rick” Rodriguez Chair, Toll-Free Phone Lines Committee
- Christine “Chris” Scott Chair, Tax Forms and Publications Committee
- Nina Tross Chair, Taxpayer Assistance Center Committee
- Leigh Ann Wood Chair, Taxpayer Communications Committee (Absent)

**Visiting Members**

- Anthony Earwood Member, Toll-Free Phone Lines Committee
- Rebecca Lammers Member, Special Projects Committee

**Staff**

- Kevin Brown TAP Management Assistant
- Conchata Holloway TAP Program Analyst
- Cedric Jeans TAP East Chief
- Susan Jimerson TAP West Chief
- Matthew O’Sullivan TAP Program Analyst
- Robert Rosalia TAP Program Analyst
- Antoinette “Toni” Ross TAP Program Analyst
- Fred Smith Program Analyst
- Rosemarie Rixey Policy Analyst Wage and Investments (W&I)
- Edwin Ford Program Analyst W&I
- Leslie Henley Program Analyst W&I
- James Bellinger Program Analyst W&I

**Welcome**

English welcomed everyone and opened the call at 1:30pm ET.

**Roll Call**

Quorum was met for the meeting.



### **Members of The Public**

None

### **Welcome/Review Agenda**

Lewis welcomed everyone and reviewed the agenda.

### **DFO/National Office Update**

English gave an update on Lillie's videos. They have to be reviewed before we can post them, and we are getting requests to change some content. Once this is done, the committee has to vote on these videos then they can be posted to our social media sites. We have been asked to do another Ad Hoc meeting concerning small businesses, which will be tentatively planned for November 2, 2022. English will get the final date once it has been confirmed. We have 10 spots for coverage.

### **TAP Managers Update**

Jimerson reported the 2022 Ad Hoc Annual Report Committee meeting. Donna Patterson was elected the lead of this committee and we will be working on an aggressive timeline to get this project completed as soon as possible. Jimerson said Patterson is doing a great job so far.

Jeans reported working to promote the TAP website and focus on the 20-Year anniversary. Jeans will send an email with this information to TAP so it can be used for outreach in all social media forums.

### **Approval of August and September JC Meeting Minutes**

Approval of August 25, 2022, JC Meeting Minutes. There were small corrections made. Brock added attendance changes to the minutes. Tross motioned; Lillie Seconded.

**Action: Minutes approved as amended**

Approval of September 22, 2022, JC Meeting Minutes. Brock added small changes and corrections. Lillie motioned; Madison seconded.

**Action: Minutes approved as amended**

### **TAP Chair Report**

Lewis reported today is the last day to vote for the National Chair and Vice-Chair, the winner will be announced on Tuesday, November 1, 2022. Lewis thanked Patterson for taking the lead on the annual report project. We are trying to get everything done by December. Lewis said the graduation will be on November 18, 2022, at 1:00pm ET. We have 13 third-year members, so please come and support this event.

### **Vice Chair Report**

Lillie asked everyone to continue doing outreach and asked the third years to remain ambassadors for TAP even after they graduate.

### Public Comments

None

### **Project Committee Review/Activities**

#### Toll-Free Phone Lines

Rodriguez reported:

Issue 60890- This issue was pertaining to the web chat from W&I and improving this feature. There were no ID numbers as this was more of a focus group request by the IRS and the response has already been forwarded to the IRS to respond.

Rodriguez motioned; Lillie seconded.

**Action:** Issue elevated to the IRS for consideration

Issue 59168 Make it Easier for Taxpayers to Contact the IRS- This is asking the IRS to expand the hours of the toll-free phone lines to evening hours and certain days of the week during tax season when taxpayers are not typically working. Thus, giving taxpayers the option to speak to the IRS about tax issues. Rodriguez motioned; Lillie seconded.

**Action:** Issue elevated to the IRS for consideration

Issue 61226- Where's My Refund extended to the last two prior year access. We are asking the phone line service to include service of the years that are available on the website. We are also asking for this information to be included on the My Account page. Rodriguez motioned; Lillie seconded.

**Action:** Issue elevated to the IRS for consideration

Rodriguez reported accountability is well with the team with good communication. The committee is working on a number of new issues for the next TAP year. Rodriguez asked when the 2023 year will start, and English indicated we intend to start the 2023 year once we get the new members onboarded. English stated this process is long and will be completed as soon as possible. February is the anticipated start for the 2023 year, according to English. Lewis and Lillie indicated that outreach can be conducted during the downtime for returning TAP members.

#### Tax Forms and Publications

Scott reported:

Issue 52476- Employers Filling out the Form 1095C Properly. There were seven recommendations. Six are clarifications for the instructions for applicable large employers filling out Forms 1095 and 1095C. There is no recourse for employees who think this form was not properly completed. Scott motioned; Lillie seconded.

**Action:** Issue elevated to the IRS for consideration

Issue 52596- Review of Form 1040 Schedules (1,2 and 3) primarily the instructions. Scott motioned; Lillie seconded.

**Action:** Issue elevated to the IRS for consideration

Issue 61996- Review of Publication 529 Related to Children and Definitions Related Children for Various Credits. There are three recommendations; two are to move the table closer to the requirements section for the credits being discussed. The third recommendation is to make a caution statement to bring it more in focus. Scott motioned; Rodriguez seconded.

**Action:** Issue elevated to the IRS for consideration

Scott indicated the committee is currently working on a number of issues in the 60000 range to try and get them out to subcommittees or to the graveyard.

### **Notices and Correspondence**

Jones started by encouraging everyone to cast their vote in the election. Jones continued by asking the Chairs to record their time and to encourage their committee members to record their time as well.

Issue 58801- Reinstatement of Installment Agreement Letter.  
Jones motioned; Rodriguez seconded.

**Action:** Issue elevated to the IRS for consideration

Issue 57391- Installment Agreement Letter. Jones motioned; Rodriguez seconded.

**Action:** Issue elevated to the IRS for consideration

Jones reported CP2000 letter project that is being worked and should be ready next month. Jones indicated that some of the previous suggestions have been implemented. Jones said Letter 2273C is currently being worked.

### **Special Projects**

Brock indicated the committee has made quorum the entire year. The committee completed their rebuttal for Issue 44253- Providing forms and publications at community-based places such as libraries and post offices. The committee is currently looking at alerting international taxpayers to the Windfall Elimination Provision, WEP. International taxpayers may have thought they earned a certain amount in social security benefits, but found it was reduced because they worked and earned a similar benefit in a foreign country. This will hopefully be ready for next month. Brock thanked everyone for working on the Annual Report and the election for all of their time.

### **Taxpayer Assistance Center Improvements**

Tross reported not making quorum but will have one issue once they do.

### **Taxpayer Communications**

Holloway reported Issue 52167- ID.ME will be voted on at the next meeting for the JC to consider. The screening committee screened 150 issues and placed four in the parking lot; seven were transferred to other committees, and the remaining issues will be closed.

### **Internal Communications Committee**

Madison thanked Lammers for getting the Facebook administrators and that the committee recently made two posts to the page. One of the postings was of the TAP 20-Year celebration.



Madison encouraged everyone to go to the page to like and share these posts for outreach. The committee is currently working on getting more posts approved to be posted during the downtime before next year. The TAP member handbook has been reviewed and O'Sullivan will share the results with the entire TAP.

#### **Action Items:**

- Post August and September minutes as amended.
- Toll-Free- Issues 60890, 59168, 61226 elevated to the IRS.
- Tax Forms & Pubs. Issues 52476, 52596, 61996 elevated to the IRS.
- Notices & Correspondence- Issues 58801, 57391 elevated to the IRS.

#### **Round Table**

Lewis reminded the committee that the next JC meeting is November 17, 2022, so members can attend. Lewis ensured all members were accounted who joined the meeting. English loved the enthusiasm from the committee and indicated she wanted to honor the committees who made quorum the entire year. Lillie asked everyone to add more detail to their activity reports for accuracy. Lillie indicated there will be activities in New Orleans and Las Vegas that are expecting large groups, so please include them on your activity reports if you attend them.

Jones asked members voting today to add "Ballot" to the title line, please. Lillie indicated there may be an issue from a client he sent to [www.irs.gov](http://www.irs.gov). Rosalia asked Lillie to send that issue to him for record keeping purposes. Lewis is looking forward to the last meeting of the year.

#### **Closing**

English thanked the committee for a great meeting and closed the meeting at 2:42pm.

**Next Joint Committee Meeting November 17, 2022, at 1:30pm**

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