

**Joint Committee (JC)  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
April 28, 2022**

**Designated Federal Official (DFO)**

- Terrie English                      TAP Director

**Members Present**

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

**Visiting Members**

- Rebecca Lammers            Member, Special Projects Committee
- Donna Patterson              Vice-Chair, Special Projects Committee

**Staff**

- Kevin Brown                    Management Assistant
- Conchata Holloway        Program Analyst
- Cedric Jeans                    TAP East Chief
- Susan Jimerson                TAP West Chief
- Rosalind Matherne        Program Analyst
- Gilbert Martinez            Program Analyst
- Robert Rosalia                Program Analyst
- Antoinette “Toni” Ross    Program Analyst
- Fred Smith                      Program Analyst
- Ramona Bailey                Program Analyst Small Business/Self-Employed
- Elaine Christophe            Tax Analyst Wage and Investments (W&I) Customer Assistance Relationship and Education (CARE)
- Lesley Henley                Program Analyst W&I
- Aphillia “Lee” Hughes    Program Analyst W&I
- Gail Johnson                  Program Analyst W&I
- Michael Odom                Program Analyst W&I
- Rosemarie Rixey              Policy Analyst W&I
- Schenita Thornton         Program Analyst W&I

### **Members of The Public**

None

### **Welcome**

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

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

English wished Lewis a happy birthday. English reported Microsoft Teams (MS Teams) will be used for all of our meetings starting May 2, 2022, so we are trying to work all the kinks out moving forward. The Department of Treasury will remove travel restrictions on May 8, 2022, for its employees. In addition, there will be a travel training session for TAP members so they know how travel is done and what restrictions are in place for travel to complete outreach.

### **Roll Call**

Quorum was met for the meeting.

### **TAP Managers Update**

Jimerson reported committees and subcommittees are working on issues at this time. The ICC started their year by voting for their leadership and setting their meetings up for the year.

There was a Membership/Mentee meeting where the new members were helped to get familiar with [www.tapspace.org](http://www.tapspace.org) to input activity reports.

Jeans reminded everyone of the technical capabilities survey sent to determine who might need help getting on the MS teams. In addition, Toni Ross is the new Outreach Committee analyst.

### **Approval of November 18, 2021 JC Meeting Minutes**

There were minor edits and corrections made to the minutes. Brock motioned; Scott seconded.

**Action:** Minutes approved as amended.

### **Notices and Correspondence**

Charles Jones reported losing two members, Meagan Regina and Willis Keenan. They will replace Will next meeting. The committee closed one issue, and subcommittee 1 is working on three projects. Subcommittee 2 is working on five projects, one being the legitimacy of phone numbers, along with 48326, 51423, and 53484.

### **TAP Chair Report**

Thanked everyone for attending the call.

- Establish JC Meeting Date for the Year

Fourth Thursday at 1:30pm ET

- Please ask your committee to update their profile on [www.tapspace.org](http://www.tapspace.org).

### **Vice-Chair Report**

Lillie spoke of doing outreach differently by assigning a specific task to each Vice-Chair to bring back to their committees to get the word and message out. These will be similar to referrals for each member to go out to the public with. Information will be provided to get these topics out to the public to make outreach easier this year.

### **JC Training**

Martinez gave a small training session on how to vote on issues and how referrals are voted on and sent to the right IRS office. Martinez indicated that referrals could contain multiple recommendations. The IRS responds within 45 days and may ask for an extension if needed.

Martinez shared that voting is done by chairs or vice-chairs sitting in for the chair. Visiting members do not have a voting role, but they can come on call to support the chairs with referrals.

The November meeting will be a week before Thanksgiving at 1:30pm.

There was a discussion about when referrals have to be completed before the TAP year ends, and Scott told Rodriguez that issues can take time to be completed and even for the IRS to respond. Jimerson shared that the Analysts will be working with the committees to complete the referrals and be there to assist throughout this process.

English shared that there may be different timelines for referrals depending on which committee is working it and where they come from. The IRS gives TAP issues with specific timeframes, and others do not have timeframes to adhere to. Martinez shared that adopted referrals come with an implementation date that he helps the committee keep up with.

### **Public Comments**

None

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

#### **Tax Forms and Publications**

Scott reported working on four new issues:

Subcommittee 1

Issue 52441 Form 990 Instructions

Issue 52617 Form 8812

Subcommittee 2

Issue 52476 Form 1095C

Issue 52596 1040 Instructions on Schedule 1, 2, and 3

The committee also reviewed and voted on a number of issues:

Issue 44396- Schedule LEP Notice 1445 (Two responses were rebutted)

Issue 48321- Section 218 Agreement SSA (Accepted)

Issue 48596- Form 1040 SR, line 38 "Estimated Tax Penalty" (Accepted)

Issue 49976- Misclassification of Bonus Money (Accepted)

Issue 49996- Form 1099R (Accepted)



Issue 51076- Instructions for Schedule SE (Form 1040) (Accepted)  
Issue 51077- Instructions for Schedule C (Form 1040) (Accepted)

Issues being reviewed for possible rebuttal:

Issue 50226- Ad-Hoc Joint Project - Form 944  
Issue 50439- Form W4, Employee's Withholding Certificate

Older responses for the committee to review:

Issue 50966 - F1040 Review for 2021 Filing Season  
Issue 50487 - Form 8857 Review-  
Issue 43953 - Publication 502-Medical Expenses  
Issue 42825 - Form 1040 Schedule 1

### **Toll-Free Lines**

Rodriguez reported working issues:

Issue 44245  
Issue 48550  
Issue 50678

Issue 55354 - Voicebot technology is being checked for bugs and issues. This issue is currently being worked. The committee is working on various virtual and in-person outreach events and remaining in contact with the public.

### **Taxpayer Communications**

Wood reported closing  
Issue 44163 - Refundable Credits  
Issue 44227 - Fresno site closure  
Issue 43838 - Third-party authorization

There are two issues waiting for responses from last year. Two carryover issues from last year are still being worked: Issue 36435 - Penalty Relief Awareness. We are awaiting a Subject Matter Expert (SME) response. Issue 41768 - Acceleration for online for taxpayers and tax professionals.

Three new issues are being worked on:

Issue 43684 - Amended Returns  
Issue 54248 - Outreach for underserved communities.  
Issue 54250 - Increase of e-filing

### **Special Projects**

Brock reported international and identity theft issues or issues otherwise outside the scope of other committees. Internal taxpayers often deal with mail issues delaying correspondence; getting help via toll-free lines; no access to TACs. Many international taxpayers need Individual Taxpayer Identification Numbers (ITINs) for their family members, which is very difficult to get and renew. They have a difficult time getting online accounts because US based products are required, making it even harder to do, so workarounds are being explored. Checks are difficult to

use, and debit cards are being reviewed to help. Free file is challenging to use. The committee is going through responses right now. One upcoming issue is good and easy access to Identity Protection PIN (IP PIN), plus ID PINs for dependents. Estimated tax payment for married couples is another issue currently being worked.

### **Taxpayer Assistance Center Improvements**

Simineo reported working on the Volunteer Income Taxpayer Assistance (VITA) training material review. The committee is working on prohibited items in the TAC offices and people not seeing the signs and making it easier for taxpayers to notice them. Oil and Gas royalties is being appealed with SMEs for assistance. We are working on outreach activities and working with the Local Taxpayer Advocates (LTA) to get outreach activities going for us.

### **Internal Communications Committee**

Madison reported that there were no specific projects to report. They established leadership and meeting dates. Several ideas were discussed to improve some internal documents and social media.

### **Round Table**

Lewis reported the voting process will be reviewed again next month. Lewis reminded everyone that the Ad Hoc Chair committee will meet on May 18, 2022, at 2:30pm ET.

Lillie said to keep trying to reach your LTA or contact them for assistance. Odom reported the IRS is looking forward to getting referrals and improving stuff. About 65 percent of referrals are approved and also implemented with his follow-up. We are interested in working with TAP, and we appreciate what TAP does. We enjoy getting SMEs to help get good referrals to IRS so they can be considered and even approved.

### **Action Items:**

- November 18, 2021, minutes approved for posting.
- Fourth Thursday at 1:30pm ET.
- Moving to MS Teams.
- November 17, 2022 will be the November meeting date.

### **Closing**

English thanked everyone for a great meeting. English said she would be watching the work and reporting out on TAP to TAS on our work. We hope our referrals are implemented. English closed the meeting at 2:46pm ET.

**Next Joint Committee Meeting May 26, 2022, at 1:30pm**

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