

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

**Designated Federal Official (DFO)**

- Terrie English TAP Director

**Members Present**

- Laurie Brock Chair, Special Projects Committee (Absent)
- Charles Jones Chair, Notices and Correspondence Committee (Absent)
- Martha Lewis National TAP Chair
- Eugene “Gene” Lillie National TAP Vice-Chair (Absent)
- Angela Madison Chair, Internal Communications Committee (Absent)
- Donna Patterson Vice-Chair, Special Projects Committee
- Richard “Rick” Rodriguez Chair, Toll-Free Phone Lines Committee
- Victoria Ramirez Vice-Chair, Taxpayer Communications Committee
- Christine “Chris” Scott Chair, Tax Forms and Publications Committee
- Patricia “Pat” Thompson Vice-Chair, Tax Forms and Publications
- Nina Tross Chair, Taxpayer Assistance Centers 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
- Kristen Gentile-White Member, Notices and Correspondence

**Staff**

- Kevin Brown TAP Management Assistant
- Conchata Holloway TAP Program Analyst
- Cedric Jeans TAP East Chief
- Rosalind Matherne TAP Program Analyst
- Gilbert Martinez TAP Program Analyst
- Robert Rosalia TAP Program Analyst
- Antoinette “Toni” Ross TAP Program Analyst
- Fred Smith Program Analyst
- Tamikio Bohler Program Analyst Wage and Investments (W&I)
- Aphillia Hughes Program Analyst W&I
- Michael Odom Program Analyst W&I
- Leslie Henley Program Analyst W&I

**Roll Call**

Quorum was met for the meeting.

## **Members of The Public**

Michelle Meador

## **Welcome**

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

## **DFO/National Office Update**

English reported we are in full swing of interviewing for the 2023 TAP year. This will continue for the next couple of weeks. We are looking forward to the JC planning meeting next month to plan for next year. There is a lot planned for this meeting.

## **TAP Managers Update**

Jimerson reported having an Ad Hoc new member training session for new members who just joined. The ICC meeting was yesterday, in which they are making progress on the Facebook page being reestablished, reviewing the member handbook, along with sections in improveirs.org being updated. The TAP West project committees are working to complete a number of referrals for the JC next month. Jeans noted Vivian Jin resigned, and we are trying to replace this position at this time.

## **Approval of May 2022 JC Meeting Minutes**

There were minor edits and corrections made to the minutes. Tross motioned; Rodriguez seconded.

**Action:** Minutes approved as amended.

## **TAP Chair Report**

Lewis thanked the TAP staff for all their hard work. She thanked the IRS personnel for all their assistance. Lewis indicated that airline and hotel reservations should already be made, contact admin if you do not have this done. Lewis told the committee to ask for suggestions from their committees to add to the agenda for the planning meeting.

## **Vice Chair Report**

N/A

## **Public Comments**

None

## **Project Committee Review/Activities**

### **Toll-Free Lines**

Rodriguez reported that Issue 50367 - ID verification via Phone required by Letter 4883C for incarcerated taxpayers. This issue is still being worked by the committee.

Issue 59168 - Extension of Customer Service Representative hours. Still being worked.

Issue 57616 - Certified Acceptance Agent Program. Still being worked.

Issue 59167 - TAP Website Enhancements is being transferred to the ICC.

Rodriguez raised Issue 55354 Voicebot Technology on the Toll-Free Lines and Telephone Assistance report on actions that were done. This was already elevated to the IRS.

Rodriguez motioned; Scott seconded.

**Action: Issue formally elevated to JC**

### **Tax Forms and Publications**

Scott reported:

Issue 56271 - Form 8863 Revision – Education Credits

The suggestions in this referral serve to add guidelines for taxpayers wishing to claim this credit in respect to other credits that may cause a choice to be made. This was made since you cannot claim the lifetime learning credit for any student if you claim the American opportunity credit for that student for the same tax year. Brock is suggesting that this issue be adjusted and not removed. The purpose for the change is to consider the fact that taxpayers who have used the Hope Credit should still have access to this in the instructions. After a detailed discussion, this issue will be sent back to the committee for more work.

Issue 52476 is still being worked by the committee.

The 1040 instructions review is still being worked by the committee.

### **Special Projects**

Brock reported the committee is still working on:

Issue 43808.

Issue 59255 - International Phone Applications.

Issue 51824 state and gift tax returns being done electronically.

There is a new issue being worked on to expand the definition of retirement accounts because of how cumbersome it is for taxpayers overseas who have accounts that have been classified in such a way to make it very expensive to report. The committee is working on E-filing Form 8621 and trying to reduce the required use of this is still being worked. There is Issue 50524 regarding overseas taxpayers being also worked.

Brock reminded the committee of the changes going on with the points system for the tax forums and that The Commissioner gave a keynote speech before them. English added, we will find out more about the points so TAP can offer them out for taxpayers speaking with our booth.

### **Taxpayer Assistance Center Improvements**

Tross reported the committee has identified several issues that will come up in the next couple of months. Tross thanked those who made doing the activity report updates simple and easy to use. Tross asked for the agenda for the upcoming planning meeting. English indicated the agenda is being finalized and will be shared with the committee once it has been completed.

### **Taxpayer Communications**

Holloway reported the committee is working on two new issues:

Issue 52167 - ID.Me

Issue 52421 - Email IRS and Facial Recognition

### **Internal Communications Committee**

Lammers reported working on setting up a new Facebook page since we cannot access the old page. Lammers will be working on making new administrators for the page.

The committee is updating the TAP member handbook and currently is reviewing Chapter 9.

O'Sullivan reported receiving Issue 59167 from the Toll-Free committee to enhance with improve.org website.

### **Notices and Correspondence**

Kristen Gentile-White spoke about Issue 53484 Letter 3030C Balance Due. There were 26 different recommendations so far, and this is still being worked. The committee is working on the Installment agreement letter. Lewis inquired about the project statement and goal statement being almost the same. There was a question in the justification section that needs to be reviewed. This issue will return back to the committee for further review. Brock indicated having the letter visible would be better for the committee to make some improvements. Lewis will join the next committee meeting to share her edits to this referral.

The committee is working on pushing individual accounts to offer things like reverse lookup options to avoid scams.

### **Round Table**

Michelle Meador asked about the member attendance, and Lewis indicated that quorum is what we strive to achieve working with everyone's schedule. Martinez indicated there is a vote needed for Issue 55354. Martinez thanked Ramona Bailey for all her help with SBSE referrals since she is retiring. Odom reported being up to date on referrals, with a few inquiries still being up in the air. Scott shared some of her outreach tactics and how some of them have worked for her.

Earwood shared how his TAP experience is going so far as a new member. Lammers shared receiving business cards a few weeks ago and how it took about 2 months, which adds to complaints from taxpayers overseas and how important this work is. We need to continue to modernize and improve for all taxpayers abroad. Tross spoke about making sure members understand the commitment they are making when joining TAP during the interviews. Rodriguez indicated that we should have a diversity of perspectives on this effort. Brock added that it may take even longer to get to countries aside from Great Britain. Lewis thanked everyone for all the work they do for TAP.

### **Action Items:**

- June 2022, minutes approved for posting.
- Issue elevated 55354
- 52476; 56271; and 53484 sent back to committee for further work.

- Suggesting the letter be included for the JC to review.

### **Closing**

English thanked the committee for all of their work and Scott for her outreach and what she shared. English thanked the member of the public for her questions. Closed meeting at 2:49pm.

**Next Joint Committee Meeting August 25, 2022, at 1:30pm**

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