

**Joint Committee (JC)  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
August 25, 2022**

**Designated Federal Official (DFO)**

- Cedric Jeans                      Acting TAP Director

**Members Present**

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

**Visiting Members**

- Anthony Earwood                Member Toll-Free Phone Lines Committee
- Rebecca Lammers               Member Special Projects Committee
- Donna Patterson                Vice-Chair- Special Projects Committee
- Patricia “Pat” Thompson Vice-Chair Tax Forms and Publications

**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
- Rosemarie Rixey                 Policy Analyst W&I
- Janet Hall                         Tax Analyst W&I

**Roll Call**

Quorum was met for the meeting.

### **Members of The Public**

None

### **Welcome**

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

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

Jeans reported the Most Serious Problems (MSPs) are still being worked through Ad Hoc meetings with TAS. Please sign up for these meetings so we can give our feedback about them. There will be a chat box added for screened issues from the Tax forums. The Commissioner just established new office for new act Inflation Reduction Act to set up and implementation of this law. This will develop new taxpayer services and tax compliance transformation. This will also help to deal with the misinformation going out about the IRS. Jeans reminded the committee that we only have three months left in the current TAP year so please start buttoning up as many issues as you can before the year ends.

### **TAP Managers Update**

O'Sullivan thanked Lammers from ICC for setting up the new TAP Facebook page. Lammers is working to add new page administrators. Charles Jones is a new member on the ICC. Today is the due date for newsletter articles.

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

Tabled until next month.

### **TAP Chair Report**

Lewis welcomed all on the call. Lewis said it was great meeting everyone in person for the JC planning meeting. They met the National Taxpayer Advocate (NTA) and asked lots of questions. The Annual report sessions have started, hopefully the chairs have started on this task. Think about who can be good leadership for TAP. We have 12 3<sup>rd</sup> year members graduating from TAP. We will do something different this year. Please share something in writing about each member from their Chair. Keep doing outreach and making a difference. Think about highlighting the 20<sup>th</sup> year of TAP. Lewis gave rules of engagement for report outs today.

### **Vice Chair Report**

Lillie spoke about misconceptions of this law that are completely wrong to correct the record while doing outreach. We will have National Taxpayer Appreciation Day on January 14, 2023.

### **Public Comments**

None

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

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

Scott presented Issue 52476 Employees to Complete the form correctly.

Most changes are clarification or expanded understanding for employers. Other changes are removing duplicate information that is already on the form somewhere else.

**Action: Issue sent back to committee for further review**

Issue 52596 HOPE credit and American Opportunity Credit changes from last month. Scott motioned; Brock seconded

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

Scott indicated the committee is currently working on two more issues.

### **Special Projects**

Brock reported that both subcommittees are currently working on issues. We had a screening committee meeting also.

Issue 48336 Electronic filing of Form 8621 Information Return by a Shareholder of a Passive Foreign Investment Company or Qualifying Election Fund. The Form 8621 should be able to be electronically filed, auto populated like other schedule forms, and consolidated if more than one is required to save time and money. We are asking that they get this in a format to be done as a free filing and/or fillable format. Brock motioned; Lillie seconded.

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

Issue 59255 Better or cheaper phone lines for international taxpayers. 10 countries were included as covered, but not other countries. Some of the 10 were not covered by this phone line. This referral seeks to make it cheaper and easier for overseas taxpayers to talk to IRS. Brock motioned; Lillie seconded.

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

### **Taxpayer Communications**

Wood indicated maximizing benefits with outreach issues for next month. The committee is seeking to increase of e-file rates issue. The committee is working on the ID.ME issue to get more taxpayers to use e-filing.

Issue 43684 seeks to improve awareness of amended tax period status. How long does it take to process these returns? We want to give more realistic and accurate time frames to taxpayers, so they know how and when to follow-up. We want the IRS to allow these to be done electronically instead of only via paper formats to speed the processing of these returns. Brock shared this is a good referral and needed. Wood motioned; Brock seconded.

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

### **Notices and Correspondence**

Jones reported the committee working on Issue 53484 Balance due and interest due. We want to make this more comprehensive and look better for taxpayers to understand. This referral also seeks to change the format to look more like the CP2000 format. We suggested every correspondence let taxpayers know they can go online to access balance and status. Brock appreciates the explanation about why the referral is a good thing for taxpayers. Brock mentioned the cancelled check may not be accessible giving those checks are processed electronically.

Jones motioned; Lillie seconded.

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

Jones spoke about new CP2000 being worked as a future project.

### **Toll Free Lines**

Rodriguez reported on Issue 57616 Certified Acceptance Agent program. Many people can't get approved so this issue seeks to expand the options for new members to get more coverage for taxpayers that need this service. Rixey reported sending responses to Odom tomorrow regarding this referral. Lillie indicated speaking with State department to expand this program for more people to qualify for my accounts. Rodriguez motioned; Wood seconded.

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

The committee is working to extend work hours for customer service. The committee dropped Issue 50367 already being handled by IRS. There were several outreach events with local tax preparers. This group invited Rodriguez to another outreach event.

Rodriguez gave a statement requesting the IRS to expand their ability to resolve issues now, teach customer service representatives to value customer service and expand the work for the IRS to the American taxpayer to be more helpful in the future.

### **Taxpayer Assistance Center Improvements**

Simineo reported working on several projects including the Volunteer Income Tax Assistance (VITA) materials update for 2023 year; prohibited items in the TAC; and how the IRS is publishing this information and improving it. They are working on an Issue dealing with pretax help being available. They are also working on oil and gas royalties.

### **Internal Communications Committee**

Madison reported reviewing the TAP handbook, completing chapters seven, eight and nine. Chapter 10 and 11 are being reviewed now. Madison reported Lammers is updating the Facebook page and looking for new administrators for the new Facebook page.

The committee has two new members; Cheryl Crow and Charles Jones. We are currently working on articles to submit to website.

### **Round Table**

Odom indicated appreciating the comments from today and looking towards the new referrals. The IRS has finished testing for the Chat Bot and are reviewing many recommendations submitted by the committee. Jones reported Issues 48326 Issue 43860 both were accepted based on budget constraints. Lillie asked for details on activity reports.

### **Action Items:**

- Issue elevated, 52596, 48336, 59255, 43684, 53484, 57616
- Issue 52476 going back to Committee
- Email notifications for elections, Jones will monitor this process.



- Email TAP annual report Ad Hoc committee for this project.
- TAP 20 in the Annual Report.
- Inflation reduction Act to share during outreach activities.

### **Closing**

Jeans thanked the committee for good discussions and closed the meeting at 2:52pm.

**Next Joint Committee Meeting September 22, 2022, at 1:30pm**

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