

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
September 22, 2022**

Designated Federal Official (DFO)

- Cedric Jeans Acting 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 (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
- Leigh Ann Wood Chair, Taxpayer Communications Committee

Visiting Members

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

Staff

- Kevin Brown TAP Management Assistant
- Terrie English TAP Director
- Conchata Holloway TAP Program Analyst
- 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)
- Edwin Ford Program Analyst W&I
- Leslie Henley Program Analyst W&I
- Michael Odom Program 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 that on October 1, 2022, will be the start the TAP 20-year anniversary. We will do a lot to celebrate this event including updating our web page and some of the successes we have had over these years. We will share the new logo for this event for the TAP members to include this in outreach and emails. Jeans asked the members to send comments to staff if you have any issues with the new logo.

Jeans indicated there are two more meetings left in the year so please try to get any referrals that are close to completion before the year ends. We want to get as many successes as possible so we can publish them in the Annual Report.

Jeans said Martinez will be going on a detail for the next four months and O'Sullivan will replace him as the lead analyst. Jeans congratulations to Martinez on this opportunity. Martinez reported that he will send out an email about the TAP election process, so members know what to expect. There will be an information session; nomination time; campaign statement; meet the candidate session; ballot submission; and results by November 1, 2022. O'Sullivan will take over after that.

TAP Managers Update

O'Sullivan will be sending a solicitation for the annual report committee. There will be a special 20-year issue lead by Jimerson and O'Sullivan. The 2023 mentorship program led by Matherne. Please encourage members to join this effort. Matherne will take over the ICC.

Approval of May 2022 JC Meeting Minutes

There were small corrections made. Rodriguez motioned; Madison seconded.

Action: Minutes approved as amended.

TAP Chair Report

Lewis reminded the committee to submit any comments on the new logo to the staff. Lewis encouraged everyone to finish up strong. Lewis encouraged members to seek TAP leadership for next year. Lewis asked members to work on the annual report.

Vice Chair Report

Lillie like the logo and gave a brief description of what outreach means as the Vice-Chair for those who would be interested in this position. Lillie reminded the committee that making referrals is the top priority for all that is done in TAP.

Public Comments

None

Project Committee Review/Activities

Taxpayer Communications

Lammers indicated the committee is working on a few issues they hope to send to the JC next month like ID.ME.

Issue 54248 Maximizing Outreach for Benefits

The purpose of this issue is to provide outreach to taxpayers to make them aware of the availability of refundable credits, such as the earned income tax credit and child tax credit. Taxpayers can qualify to receive tax benefits through refundable tax credits. Taxpayers need to be aware that these credits are available to them. Lammers asked to add an international aspect into the referral for credits that expats are eligible for. Odom reminded the committee of how to review the source of the referral if it was received from the IRS. Odom also reminded the committee of how the time frame may change depending on where the recommendations have to be considered.

Lammers' adjustment was added at the end of the meeting. Rodriguez motioned; Brock seconded.

Action: Issue 54248 elevated to the IRS for consideration as amended.

Issue 54250 IRS E-file and Online Adoption Rate Improvements

Lammers suggested including the international taxpayers to sign up for online accounts also. Gentile-White made suggestions to bring attention to this information being available online. The referral was adjusted to place this information in the referral to bring attention to taxpayers to hopefully alleviate phone calls or communications by taxpayers. Wood motioned; Rodriguez seconded.

Action: Issue elevated to the IRS for consideration as amended.

These issues were reviewed, and several adjustments were recommended. The issue will be tabled until the end of the meeting. The adjustments were added at the end of the meeting.

Notices and Correspondence

Jones reported the committee had three letters to be approved, but quorum was not made so it was delayed until the next meeting. They are working on CP 2000. Jones credited Gentile White for creating a "Red Line" for the committee to see changes made easier while creating referrals. Jones mentioned that Gentile-White suggested Ad Hoc meetings for returning members to help the newer people know the dos and don'ts.

Toll Free Lines

Rodriguez reported the Voice Bot referral feedback yet to be reviewed. Issue 60890 being worked and should be ready next month. Issue 59168 and 61226 both being worked, and we are looking to finish them by October of November. The outreach is focusing on the 20-year anniversary. Rodriguez is asking members to keep in mind the National Taxpayer Advocate Most Serious Problems (MSPs) while doing outreach.

Taxpayer Assistance Center Improvements

O'Sullivan reported having issues with the screening report and tabled this effort to next month.

The committee is almost finished with an issue about prohibited items and signage. The Oil and Gas royalties issue IRS response had to be accepted.

Tax Forms and Publications

Scott indicated the committee is currently working on three more issues. There will be two issues for October.

Special Projects

Brock reported reviewing two responses from IRS, Issue 51693 all three issues were already resolved. The response was accepted. Issue 44253 will be rebutted. We will be providing a formal comment regarding Rev 2020-17 to the IRS.

Internal Communications Committee

Madison reported complete handbook review with updating screenshots along with other recommendations. Social media posting is being worked on and the 20-year TAP celebration will be included in our branding efforts. We are establishing a protocol for social media postings so we can make them on a regular basis. Lammers worked on adding Facebook administrators to maintain access to the page. Jeans reported working on info graphs as part of the 20-year anniversary for TAP. Madison said want the social media posts to be engaging to keep the audiences interested.

Round Table

Lillie asked the committee to be mindful of the Puerto Rico member Michael Avery since they have no water or power. Rodriguez recommended a change to the 20-year banner. Odom will be on detail and Tamikio Bohler will cover for the next four months.

Action Items:

- Issues elevated, 54250, 54248
- Post July minutes
- Email about election
- TAP annual report messages to come

Closing

Jeans thanked the committee for good work on getting the referrals to the IRS. Congratulated Odom and Martinez for their details. Jeans closed the meeting at 2:49pm.

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

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