

**Joint Committee (JC)  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
April 26, 2023**

**Designated Federal Official (DFO)**

- Frank Bustos                      Acting TAP Director

**Members Present**

- Denise Besson                      Chair, Taxpayer Communications Committee
- Debra “Debbie” Kurita              Chair, Toll-Free Phone Lines Committee
- Eugene “Gene” Lillie              National TAP Chair
- Angela Madison                      National TAP Vice-Chair (Absent)
- CJ Mills                              Chair, Taxpayer Assistance Center Committee (TAC)
- Donna Patterson                      Chair, Special Projects Committee
- Richard “Rick” Rodriguez              Chair, Internal Communications Committee (ICC)
- Patricia Thompson                      Chair, Tax Forms and Publications Committee
- Kristin Gentile White                      Chair, Notices and Correspondence Committee

**Visiting Members**

- Anthony Earwood                      Member, Toll-Free Phone Lines Committee
- Kristen Gentile-White                      Member, Notices and Correspondence
- Rebecca Lammers                      Member, Special Projects Committee

**Staff**

- Kevin Brown                              TAP Management Assistant
- Conchata Holloway                      TAP Program Analyst
- Hannah Jair                              TAP Program Analyst
- Cedric Jeans                              TAP East Chief
- Susan Jimerson                              TAP West Chief
- Rosalind Matherne                      TAP Program Analyst
- Matthew O’Sullivan                      TAP Program Analyst
- Robert Rosalia                              TAP Program Analyst
- Antoinette “Toni” Ross                      TAP Program Analyst
- Fred Smith                              TAP Program Analyst
- Ann Tabat                              TAP Program Analyst
- Mejbeen Balsara                              Program Analyst Wage and Investments (W&I)
- Kim Stewart                              Deputy National Taxpayer Advocate

**Members of The Public**

- Martha Lewis
- Scott Rogers

## **Welcome**

Bustos welcomed everyone and opened the call at 2:00pm ET.

## **Roll Call**

Quorum was met for the meeting.

## **Welcome/Review Agenda/DFO/National Office Update**

Bustos welcomed everyone, reviewed the agenda, and explained how the meeting would be conducted. Lillie acknowledged the talent on the committee and how this energizes the effort to fix IRS issues.

## **TAP Managers Update**

Jeans indicated that we are working on outreach efforts for the year. Fred Smith reported the recruitment period is being extended through next month. We want applications from states not received yet. Smith will send a message with states where no applications have been received.

Jimerson reported recent changes to TAP West:

1. Hannah Jair was added to the staff and will lead the ICC Lead and the Annual Report
2. Let us know if you have not received your 2022 Annual Report
3. First ICC meeting, Rodriguez will report out.

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

Approval of November 17, 2022, JC Meeting Minutes. Slight amendments were made. Patterson motioned; Rodriguez Seconded.

**Action:** Minutes approved as amended

## **TAP Chair Report**

Lillie reported E-Services transitioning to using the ID ME technology. Lillie reported on an upcoming interview on May 2, 2023, with Kristi Moquin to talk about the Local Taxpayer Advocates (LTAs). Lillie spoke about the activity that is going on and how members are seeking outreach efforts. These efforts are greatly appreciated. Lillie is also looking forward the face to face meetings next month.

## **Vice Chair Report**

Kurita reported on behalf of Madison that TAP should be in full swing with outreach efforts. We are encouraging members to do outreach and complete their outreach reports. We want to promote TAP on social media for taxpayer issues and for the recruitment efforts. Kurita is very active in California and working with her LTA and doing a number of community events. Kurita indicated that her most recent local event was very productive.

## **Public Comments**

Scott Rogers presented an issue regarding the Tax Practitioner phone line. There is inconsistent assistance from the line. The public should be able to get tax account assistance on this line. It should be a lot easier to get information, but it is not. Rogers continued that the call wait times are a big issue and this adds to delays in processing returns. Bustos gave information about the LTA for assistance with some of the issues and will get this to the taxpayer.

### **Set Recurring Meeting Date**

Fourth Monday at 3pm ET

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

#### **Toll Free Lines**

Kurita reported the committee leadership being picked at this time. The committee is working issues and IRS responses:

- IRS Response Issue 61226 Update Service for Where's My Refund- Being Reviewed
- IRS Response Issue 57616 Certified Acceptance program- Non adopted. Accepted and closed.
- Issue 66029- being worked
- Issue 52598- being worked
- Screening committee meeting soon.

### **Tax Forms and Publications**

Pat Thompson reported:

Subcommittee 1

IRS Response Issue 61996 Pub. 929- IRS response accepted.

Issue 62742 Form 8615- Being worked

Subcommittee 2

Issue 52664 Form 3520 and instructions- Streamline and improve documents- Still being worked.

Thompson indicated that leadership has been set up for both subcommittees.

### **Notices and Correspondence**

Kristin Gentile White reported:

Subcommittee 1

- Working on CP2000, meeting with a Subject Matter Expert (SME) soon.
- Picking 20 most confusing letters, which are being worked now.

Subcommittee 2

- Issue 52479 CP503 individual balance due- being worked
- Letter 3030c response from IRS- rebuttal being worked.

### **Taxpayer Communications**

Denise Besson reported the committee leadership has been established.

- IRS Response to Issue 43684- Accepted
- Issue 54250- Tabled
- Issue 48294 Entities with multiple TINs- tabled for more research
- Issue 66193- Being reviewed
- Issue 51229 IRS Pro Tool (PPP)- Closed for lack of relevance.

### **Taxpayer Assistance Center Improvements**

CJ Mills reported the committee leadership has been established.

Issue 66143 Taxpayer communications record keeping- being worked with collaboration with the Taxpayer Communications and Special Projects committees.

Issue 55988 and Issue 58876 being combined and worked.

Issue concerning the most common request and reasons taxpayers visit TAC is being worked.

IRS Response to Issue 51205 Being reviewed

IRS Response to Issue 54682 TAC prohibited items-Response received is being reviewed.

Mills met with both LTAs and has set up meetings fir every other month. An issue concerning financial hardship refund request being reviewed by the committee. Patterson wants to work with the committee on an issue.

### **Special Projects**

Patterson reported the committee leadership has been established. The Screening committee will be meeting tomorrow. The committee is currently reviewing Form 8621 E-Filing passive foreign income forms. The committee is working on Issue 48366 pertaining to international taxpayer inability to call to get tax help. The committee is working with the Forms and Publications committee on some tax forms.

Patterson reported that several members are interviewing their LTAs to find out more about the TAS intake process. Issue 58722 Misleading information on the IRS website is being worked. They are also looking to update the language to make sure they are all saying the same things with their language.

### **Internal Communications Committee**

Rodriguez reported that committee leadership has been established and the Speak-Up brochure is being updated. We hope to have this project finalized by June. We are looking to increase our social media audience and we are working on a guide for Instagram and Facebook and all social media formats. We are looking to get TAP member pictures on the next Annual report.

### **Action Items:**

- Post November Minutes as amended.
- Clarify Issue 61344
- Bustos will reach out to Mr. Rogers

### **Round Table**

N/A

### **Closing**

Bustos said we will give the committee a heads up on the agenda for the face-to-face meeting soon. Bustos closed the meeting at 3:30pm.

**Next Joint Committee Meeting Date and Time to be Determined**

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