

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
May 30, 2023**

Designated Federal Official (DFO)

- Cedric Jeans 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
- 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

- Steven Sklar Vice-Chair, Notices and Correspondence Committee

Staff

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

Members of The Public

None

Roll Call

Quorum was met for the meeting.

Welcome/Review Agenda/TAP Managers Update

Jeans welcomed everyone and opened the call at 2:00pm ET. Jeans reviewed the agenda and indicated he would be filling in as the DFO until Frank Bustos joins the call.

Jeans thanked the members for joining the face-to-face and all they offered for the success of the meetings. Jeans asked the members to please complete the survey, and encourage their committee members to do the same, for us to capture concerns or suggestions to make things better. Please do so until June 7, 2023.

Jeans reminded the members to work with the administrative staff and complete their travel vouchers as quickly as possible. Jeans also spoke of the preparations for the tax forums and who would be attending them. The members for each of the five tax forums have been selected.

During the face-to-face meetings an issue about the IRS response times or time frames for our referrals was discussed. The National Taxpayer Advocate (NTA) will be added this as part of her June Report to Congress to reduce the cycle time of the IRS to respond to our referrals. The staff is working on fixing glitches on the www.tapspace.org and this should be completed soon.

Approval of April 26, 2023 JC Meeting Minutes

Tabled until next month.

TAP Chair Report

Lillie and Madison spoke about social media special project to improve our social media presence. This project is still being worked on. Lillie was happy to see folks join in DC.

Vice Chair Report

Madison thanked veterans for making the ultimate sacrifice. We did not have an Outreach Committee meeting, but we spoke a bit about it at the face-to-face meeting. We will pick up the pace for social media posts. Madison encouraged members to share any future outreach planned that is open to the public so it can be posted.

Public Comments

N/A

Project Committee Review/Activities

Toll Free Lines

Kurita reported having a great face to face meeting and being able to screen numerous issues. As a result, 75 issues were closed, and they have 17 possible issues to work on. Of those 17, four were possible international taxpayer issues; seven were assigned to subcommittee 1 and six to subcommittee 2. Kurita indicated how much the face-to-face interactions helped the committee's work.

Tax Forms and Publications

Thompson reported having a great meeting in Washington D.C. and how great it was to meet personally with her committee. There are several issues that will be sent to the JC very soon to include Issue 62742 Form 8615 and instructions. There was a screening meeting done which added a few issues to the committee's working list. Review of the 1099K Form; Volunteer Income

Tax Assistance (VITA) Form 13614 review; several that related to the Form W-4; Form 1040NR; IP PINs for children; Form 1098T; and Pub. 970.

Subcommittee 1 was assigned two additional projects, one to do with adding a digital asset publication, feedback is welcomed from other committees. Form 8915 is the other issue for this subcommittee.

Subcommittee 2 is working on Form 3520 Foreign accounts and trusts. This project will probably be ready very soon. Form 2210 under payment of estimated tax by individuals, estates, and trusts and more guidance on descendants are the other issues being worked by subcommittee 2.

Patterson requested to attend Forms & Publications invite to work with them on a few projects.

Notices and Correspondence

White reported having a great face to face meeting. The committee focused on screening issues despite having lots of new members. They added a couple to their top 20 notices list, which will be divided amongst both subcommittees. Subcommittee 1 will meet with a Subject Matter Expert (SME) relating to the CP 2000.

Subcommittee 2 will work on the CP 2000 list and the Letter 3030C from last year. The committee is getting great experience working through this process. The Letter CP503 is being worked as part of the top 20 notices. The committee had a great session with the Office of Taxpayer Correspondence and will be meeting with them again soon.

Taxpayer Communications

Besson reported working on several issues from their Parking Lot. Taxpayers are looking for an easier way to update their banking information. This is being researched currently. The next issue is secure communication with the IRS for questions and problems, which would solve this whole problem. We know the IRS is working on some of these issues, it is just taking a while for them to be put in place. We want to stay involved so we can give feedback to the taxpayers who raised these issues.

The Get My Refund app only works with Chrome is being researched. The CP80 issue being worked as this informs taxpayers that their return may have been lost. We are seeking to get more information into this form for the taxpayer. The committee continues to work Issue 52167 ID Me, and we are awaiting an IRS response. We also were able to screen issued last week.

Taxpayer Assistance Center Improvements

Mills reported five of the nine committee members joining the face-to-face meeting in person. Subcommittee 1 worked on issue 66142 VITA and Tax Counseling for the Elderly (TCE) annual review of training materials. The committee has requested and is awaiting further instructions on this project.

Issue 66143 Taxpayer Communication Record Keeping. This issue concerns the need for taxpayers to understand the need to maintain tax records and how doing so can help protect them from identity theft. This issue is being worked in conjunction with the Taxpayer

Communications and Special Projects committees. Issue 55966 and 59976 allows taxpayers not being able to schedule an appointment and TACs not accepting walk-ins. This issue is still being worked. Issue 54682 - TAC Prohibited items, made three recommendations. The first recommendation had been implemented and is resolved; the second recommendation was non-adopted and is being reviewed; and the third recommendations was adopted with an implementation date of June 23, 2023.

Kurita indicated they have issue 62716 that is related to identity theft and may need to be shared so we are not duplicating efforts of other committees. Mills shared that while screening issues, the committee closed 104 issues as individual issues and the screening process will continue tomorrow.

Screening report done.

Special Projects

Patterson reported the IRS response for Issue 59522 International Phone Apps was accepted because the accepted referral of creating an international call back feature. Issue 63760 Retrieval of ID PIN welcomes working with other committees relating to ID theft. The primary reason for this issue was helping taxpayers retrieving the ID PINs online. There is a pilot program working this issue. Kurita reported not getting an annual letter each year, instead having to go online to retrieve a new PIN each year. This will be added to the issue.

Issue 58722 will be moved to the JC next month regarding misleading words on the extension to file verses pay the tax. International taxpayers are the focus of this referral.

Estate gifts and tax is being reviewed from an international perspective and this committee will work with other committees to ensure we are not duplicating their efforts.

During the screening meeting, we closed 13 issues. The committee is working on the Form 1099K and is looking for a SME on this project. Rita Green is doing outreach in Puerto Rico and Lammers is working on international education outreach. Patterson did outreach on embracing diversity, engagement, and inclusion. Patterson spoke on her work with TAP and Stakeholder Partnerships, Education & Communication (SPEC). The discussion continued with several underserved communities in the Seattle, WA area.

Internal Communications Committee

Rodriguez reported the ICC is working on improving the Speak-Up brochure and hope to have this ready for the next JC meeting. The committee is taking on the www.tapspace.org review. The goal is to update it to make more connections; make the navigation easier, and make sure it is TAP member focused. The social media topic was discussed at the face to face and the social media topic will remain with his committee instead of being sent to the Outreach Committee.

Rodriguez asked members to send issue through their members instead of bringing them to the ICC to present issues please thus allowing members to step up and work the issues on the committee.

Action Items:

- Minutes from last month and this month for pre-reads for the next meeting.

Round Table

Please get pre-reads to JC in a timely manner so they can be reviewed prior to the meeting. Kurita inquired about how the Debt Limit deal calling for a reduction in the IRS budget would affect the TAP. Jeans indicated the staff will pass any information they receive about this topic. Lillie requested the JC to review the TAP bylaws for possible changes to this document. Mills sent a proposed change to the TAP Director to be considered several months ago.

Closing

Jeans commented on the committee recognizing the similarities in projects and promoting collaborations. Jeans suggested reaching out to chairs to join their subcommittee meetings if you are from another committee. Jeans asked for Outreach successes to be shared on improveirs.org to share with the public. Meeting closed at 12:54pm ET.

Next Joint Committee Meeting Date is June 26, 2023 at 3:00 PM ET

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