

**Joint Committee (JC)  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
July 24, 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 (Absent)
- CJ Mills Chair, Taxpayer Assistance Center Committee
- Donna Patterson Chair, Special Projects Committee
- Richard “Rick” Rodriguez Chair, Internal Communications Committee
- Patricia Thompson Chair, Tax Forms and Publications Committee
- Kristin Gentile White Chair, Notices and Correspondence Committee

**Visiting Members**

- Rebecca Lammers Member, Special Projects Committee

**Staff**

- Kevin Brown TAP Management Assistant
- Conchata Holloway TAP Program Analyst
- Hannah Jair TAP Program Analyst
- Susan Jimerson TAP West Chief
- Rosalind Matherne TAP Program Analyst
- Matthew O’Sullivan TAP Program Analyst
- Robert Rosalia TAP East Chief
- 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)

**Members of The Public**

- Martha Lewis

**Welcome**

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

**Roll Call**

Quorum was met for the meeting.

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

Jeans spoke about the notice improvement tasks that have been going on. The IRS wants TAP to share a list of the top 20 notices and letters that have been causing confusion for the public. This task has been taken on by the Notices and Correspondence committee. Jeans indicated we are comparing this list with what Systemic Advocacy (SA) has on its' list. The intent in to improve, digitize and add Quick Response Codes (QR) to these documents. Jeans challenged the committee to share their suggestions of documents that need to be added to this list.

In addition, we have been asked to participate in two focus groups. One will be on August 11, 2023, involving the transparency of the IRS subject matter. We will send an email soliciting participants for this group soon. The second one will be in September; Jeans will get the information out once he receives it.

### **TAP Managers Update**

Rosalia spoke about adding more content to [www.improveirs.org](http://www.improveirs.org) website. Please share articles with your analyst that you think would be good to share including outreach stories. Patterson asked about an issue concerning artificial intelligence, Rosalia indicated we are still waiting for that response.

Jimerson spoke with Communications, Stakeholder Liaison & Online Services (CSO) looking at functionality or latency of [www.tapspace.org](http://www.tapspace.org). Some changes and improvements have been made and they continue with this. Discussions are ongoing for improving this website.

TAP West welcomed Jantel VanOrden to the Toll-Free Phone Lines Committee (TFPL). Matherne will transition back to Toll-Free and Holloway will take over JC.

### **Approval of August and October Joint Committee (JC) Meeting Minutes**

Approval of July 17, 2023, JC Meeting Minutes. Slight corrections were made to the wording. Kurita motioned; Patterson Seconded.

**Action:** Minutes approved as edited.

### **TAP Chair Report**

Lillie will attend a problem-solving day with the Local Taxpayer Advocate (LTA) the local congressman.

### **Vice Chair Report**

Madison reported the Facebook administrator meeting has been scheduled for tomorrow at 12:00 pm ET. There is an event on Friday in San Diego with Luis Tejeda, Los Angeles LTA.

### **Public Comments**

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

##### **Toll Free Phone Lines**

Kurita reported nothing new from last week.

### **Tax Forms and Publications (TF&P)**

Pat Thompson reported nothing new from last week.

### **Notices and Correspondence (NCC)**

Kristin Gentile White reported:

- NCC Referral Issue 53181- CP80

This is when IRS has not received your tax return. All of our referrals included adding that online accounts are available to taxpayers that will allow them access to this information electronically. This referral is specifically when a return and payment has been sent to the IRS and the return may have been misplaced. This referral seeks to clarify why the taxpayer is receiving this form and not accusing them of doing anything wrong. Changing the wording could also ease the taxpayer's stress level.

This referral seeks language that indicates that the return may not have been received and to soften up the language as the IRS just may not have it in the system yet. We would like to educate the taxpayer so they know if there is an action needed on their side since this could affect a pending refund. Thompson suggested clarifying language to make the letter flow better. Mills brought up this as being an issue called "missing paper tax returns" from her LTA, as she thought these issues might be related.

Lillie suggested reviewing CP 80, CP 080, and CP 081 to save some time since the verbiage is all the same. Mills suggested sending this back to consider reviewing all three notices also. Lammers suggested elevating the current referral and take the other notices into consideration as a separate project. Jeans agreed with Lammers. White requested more information about the notices that includes all the CP notices and all in their series. Matherne will send the list of notices for the committee members to review. Lillie suggested review the CP 503 series as a separate project.

Patterson asked the committee to consider online accounts with regard to this, but this was already included in the referral. Mills motioned; Madison seconded.

**Action:** Issue referred back to the committee for further research and follow-up.

- NCC Referral Issue 52479- CP503

White indicate this referral was to get taxpayer and option to use the QR code or a phone number and an option to have other payment options for this notice. Thompson suggested formatting changes and softening the tone of the IRS for the message going out to the taxpayer. Lammers suggested including the non-toll-free number be added along with "charges may apply" to inform international taxpayers who might be trying to call the number on the form.

Mills motioned that Issue be referred back to the committee for further research and follow-up and to be reported back for next month's meeting; Patterson seconded. Mills explained that the request of a report back did not mean the issue had to be resolved by the next meeting.

**Action:** Issue referred back to the committee for further research and follow-up. In addition, a report back at the next meeting.

### **Taxpayer Communications Committee (TCC)**

Denise Besson reported no changes since last week.

### **Taxpayer Assistance Center Improvements (TAC)**

CJ Mills reported awaiting information from the LTA regarding missing paper tax returns.

### **Special Projects (SP)**

Patterson reported Tiongquico heading the 1099K project. Lammers will head up Issue 48336 to covert Form 8620 a free fillable form.

Subcommittee 1 Issue 60604; 63676, and 64665

Sub 2 issue 51824. We hope to have a referral around estate and gift planning. They are also working issue 60606. The Screening committee will be meeting soon with a secondary meeting following as needed.

### **Internal Communications Committee (ICC)**

Rodriguez reported completed speak up brochure. They are now taking on [www.taxspace.org](http://www.taxspace.org). They are reviewing the Outreach Toolkit for outdated materials. The [www.Improveirs.org](http://www.Improveirs.org) is different from the [www.Tapspage.org](http://www.Tapspage.org). They met with a Subject Matter Expert (SME) met and explained the system cannot be improved, they are trying to tweak, but cannot fix the problems with these websites. There is nothing on the horizon to correct this issue, but we are work with CSO to make improvements that we can. Rodriguez is recommending the Chair and Vice-Chair meet with the NTA to see why we can't be supplied with what fits our needs. This platform is not fitting our needs and is not a good thing.

Please submit articles for the newsletter to Hannah Jair please.

### **Action Items:**

- Post July 17, 2023 minutes.
- Matherne will distribute the document list to everyone.
- Issue 61344 Issue 53181 sent back to the committee for further research and follow-up.

### **Round Table**

Mills and Lillie inquired about their recommendations to the bylaws since no responses have been received. Patterson asked to have this project be shared with the committees then come back to the JC to review this project. Jeans asked the members to send them to him.

### **Closing**

Jeans thanked everyone for joining and closed the meeting at 4:19pm

**Next Joint Committee Meeting August 28, 2023, at 3:00pm**

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