

**Special Projects
Taxpayer Advocacy Panel (TAP)
Monthly Meeting Minutes
Wednesday, March 29, 2023**

Designated Federal Officer (DFO)

- Cedric Jeans TAP East Chief

Attendance

- | | | |
|------------------------|-----------------------|-----------------|
| • Shequeila Birdsong | Amherst, NY | Member |
| • Aisha Earle | Alpharetta, GA | Member (Absent) |
| • Kimberly fox | Panama City, FL | Member |
| • Rita Green | Memphis, TN | Member |
| • Steven Hall | Holbrook, NY | Member |
| • Rebecca Lammers | International/ London | Member |
| • Jared Lefevre | Billings, MT | Member (Absent) |
| • Aida Lopez-Quinones | Guaynabo, PR | Member (Absent) |
| • Donna Patterson | Bothell, WA | Member |
| • Rene Tionguico | Washington, D.C. | Member |
| • Eugene “Gene” Lillie | National Chair | Visitor |
| • Angela Madison | National Vice-Chair | Visitor |

Staff

- | | |
|--------------------------|---------------------|
| • Frank Bustos | Acting TAP Director |
| • Conchata Holloway | TAP Program Analyst |
| • Kelvin Johnson | TAP Program Analyst |
| • Robert Rosalia | TAP Program Analyst |
| • Antoinette “Toni” Ross | TAP Program Analyst |
| • Fred Smith | TAP Program Analyst |
| • Ann Tabat | TAP Program Analyst |

Members of the Public

None

Welcome Announcements/Comments/Acknowledgements

Cedric Jeans welcomed all attendees and opened the meeting at 11:00am ET.

Roll Call

Brown called roll and quorum was met.

Welcome/Announcements/Comments/Acknowledgement of Citizens

Jeans opened the call and welcomed everyone and reviewed the agenda for today.



Roll Call

Brown completed roll and quorum was met.

Self-Introductions

The TAP staff and TAP members introduced themselves and shared a small bit about themselves as a self-introduction.

Fred Smith reported that the TAP recruitment period has been extended until April 14, 2023.

TAP Mission

Cedric Jeans reviewed the TAP mission and reviewed the basic functions of TAP. The TAP listens to taxpayers, identifies taxpayers' issues, and makes suggestions for improving IRS service and customer satisfaction.

TAP Members

Commit to volunteer time; Identify grass root issues; and Prepare Annual Report. This is done under the Taxpayer Advocated Services (TAS) which provides the funding, support services and the Designated Federal Officers (DFO).

According to the TAP Charter

TAP Objectives

Provide a taxpayer perspective on critical tax administrative programs.
Provide listening opportunities for independent taxpayer comments.
Have direct access to the appropriate operating division.

TAP Success Stories

Longer extension of time to file tax returns.
Improvement recommendations to numerous forms and instructions.
Updated filing requirement verbiage on form 7004.
Customer callback feature for toll-free phone lines.

Project Committees

Work issues assigned from the TAS of the IRS
Work with IRS program Owners and Subject Matter Experts
Screen new issues.

Recommendations

Work issues assigned from TAS or the IRS.
Work with IRS program owners and subject matter experts.
Screen new issues.

Committee decides whether to pursue the issue or drop it.
Should focus on Customer service improvement.
Should be fully developed, clearly written and significant for the taxpaying public.

Staff Support

Appoint DFO for the project committees.

Work with the panel and IRS to promote efficient project efficient project committee.

Facilitate communication among all parties involved in the committee.

Final review of recommendations referrals to ensure that all information matches the database.

Research and analysis of issues

Facilitate communication between IRS and TAP

Review or recommendation referrals

Assist members in meetings.

Consolidate outreach reports.

Prepare travel documents/reimbursements.

TAP Meeting Procedures (Presented by Toni Ross)

- Ground Rules

Listen to the ideas and opinions of your fellow panel members and give everyone the time to speak their minds. Above all, be respectful of one another.

- Telephone & E-Mail Etiquette

Please arrive five minutes ahead of your call.

Identify yourself.

Limit the side bar conversations.

Mute yourself when not speaking.

Participate and don't get discouraged.

Do not reply all or cc everyone unless necessary.

Consider others time and feelings during these meetings.

- Minutes/Minutes Approval

Please review the meeting minutes, agendas and pre-reads prior to each meeting.

The Chair, DFO and analyst will work on some pre-reads.

- Establish Quorum & Consensus

Quorum is 50 percent plus one.

- Agenda & Pre-Read Information

This information will be shared during the meeting via MS TEAMS.

Pre-reads and other meeting materials will be available on www.TAPspace.org; www.irs.gov; and www.improveirs.org.

- Activity Reports/Time Reporting

Complete on the www.tapspace.org site. Document all TAP time to include meetings, subcommittee meetings and outreach.

- Methods of Communication

The primary means of communications will be by email; telephone; fax; and MS TEAMS

So You want to Be A Chair?

Ross explained the responsibilities for the Chair and Vice-Chair positions.

Nominations and Election process (Chair/Vice-Chair)

- Nominate Candidates

Rene Tiongquico nominated Donna Patterson nominated for Chair.

Patterson running unopposed and was voted unanimously as committee Chair.

Vice-Chair nominations will be tabled until the next full committee meeting.

Subcommittee- self-nominated

Subcommittee- self-nominated

- Self-Introduction/Bios

Quorum will remain 50 percent plus one.

Thompson motioned; Weigel seconded

Action: Quorum decided by committee

Approval of Minutes

November 8, 2022, minutes up for approval. Fox, (Tiongquico or Green) and Patterson made edits for clarification for the minutes. Fox motioned; Tiongquico seconded.

Action: Minutes approved as revised.

TAP Screening Process

Ross reviewed the screening process in detail. The Screening committee, made up of at least three members, review issues submitted via outreach, calls to the toll-free line or from the IRS. They then determine if it is a TAP issue and decide if it stays with this committee or should be transferred to another TAP committee. If appropriate, the issue is routed to the correct TAP committee. The issue is dropped if it does not meet the TAP criteria. Some issue may require more research and can be placed into the “Parking Lot.”

Establishment of Subcommittees and Meeting Dates:

Full committee meeting- Second Wednesday at 11am ET.

Subcommittee 1(International Issues) Meeting- First Thursday 11am ET.

Kimberly Fox

Rebecca Lammers

Aida Lopez-Quinones

Donna Patterson

Rene Tiongquico

Subcommittee 2 Meeting- First Thursday 2pm ET

Shequeila Birdsong

Jared Lefevre

Rita Green

Steven Hall

Outreach (Vice-Vacant)

Screening Members (Shequeila Birdsong; Rita Green; Rebecca Lammers)



Quality (QR) (Rene Tiongquico; Steven Hall)
Internal Communications (Rebecca Lammers)

2023 Project Committee Work

- Issues 51824-Estate Gift Tax Filing
- Issue 58722-Misleading Wording on IRS Website
- Issues 65214-US Citizens Abroad with Retirement Income- Sub. 1
- Rebuttals for Issues: Issue 48336-Electronic Filing for 8621; and Issue 59522-International Phone Apps

Action Items

Ross will do the following:

- Post November 9, 2022 minutes
- Vice-Chair election on April 12 Full Committee Meeting
- Rebuttals for Issues: Issue 48336-Electronic Filing for 8621; and Issue 59522-International Phone Apps- Assigned to Subcommittee-1
- Issues 51824-Estate Gift Tax Filing and Issue 58722-Misleading Wording on IRS Website- Assigned by Subcommittee- 2

Roundtable

Chair SP Committee Closing Comment

Closing

Jeans closed the meeting at 1:00pm ET.

**Next Meeting: April 12, 2023 at 11:00am EST/12:00pm CST/1:00pm
MST/2:00pm PST/7:00am AST/6:00am HST**

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