

**Special Projects
Taxpayer Advocacy Panel (TAP)
Monthly Meeting Minutes
Wednesday, April 12, 2023**

Designated Federal Officer (DFO)

- Robert Rosalia Acting TAP East Chief

Attendance

- | | | |
|------------------------|-----------------------|-----------------|
| • Shequeila Birdsong | Amherst, NY | Member |
| • Kimberly fox | Panama City, FL | Member (Absent) |
| • 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 Tiongquico | Washington, D.C. | Member |
| • Eugene "Gene" Lillie | National Chair | Visitor |

Staff

- | | |
|--------------------------|-------------------------|
| • Frank Bustos | Acting TAP Director |
| • Kelvin Johnson | TAP Program Analyst |
| • Robert Rosalia | TAP Program Analyst |
| • Antoinette "Toni" Ross | TAP Program Analyst |
| • Fred Smith | TAP Program Analyst |
| • Roz Matherne | TAP Program Analyst |
| • Ann Tabat | TAP Program Analyst |
| • Cindy Jones | IRS Program Owner (W&I) |
| • Mejbeen Balsara | IRS Analyst (W&I) |

Members of the Public

None

Welcome Announcements/Comments/Acknowledgements

Acting DFO Rosalia 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

Frank Bustos opened the call and welcomed everyone and reviewed the agenda for today.

Roll Call

Brown completed roll and quorum was met.

Chair Welcome

Patterson welcomed everyone to the call.

Director Report Out

Bustos spoke on the filing season, Face to Face Meeting in Washington DC in May. Noting that Patterson and Lammers will provide training at the F2F meeting in May 2023.

Acting DFO Report Out

Rosalia spoke about the focus group meeting coming up regarding the Form 1099-K regarding third party payments; Tax Forums coming soon.

Fred Smith reported that the TAP recruitment period has been extended until April 30, 2023. Fred also spoke out about the Outreach committee. They will be setting up the next Outreach meeting in a couple of days.

Approval of Minutes

March 29, 2023, minutes up for approval.

Action: Minutes approved as revised.

Chair Report out

Patterson reported that Rita Green will be the Special Projects Vice Chair for 2023. She thanked Green for stepping up to the task.

Subcommittee-1 Report Out (Lammers, Chair)

- Issue 48336-Electronic Filing for Form 8621: Fox will write a blurb to be sent to the ETAC regarding forms being electronic filed.
- Issue 59722-International Phone Apps: Rebuttal will be discussed for this issue. Lammers to do a little more research regarding what technical availability to help international caller to the IRS.

Subcommittee-2 Report Out (Hall, Chair)

- Issue 58722-Misleading Wording on IRS Website; Members are working on the referral for this issue.
- Issue 51824-Estate Gift Tax Filing: Members were assigned homework regarding estate gift tax forms.

Action Items

Ross will do the following:

- Post March 29, 2023 minutes

Roundtable

Matherne spoke about the focus group for 1099-K; there will be nine members on the focus group and invites will be sent out early next week. There was a request made for questions from the member and the deadline for feedback is due by April 19, 2023.

Chair SP Committee Closing Comment

Closing

Rosalia closed the meeting at 1:00pm ET.

Next Meeting: May 18, 2023 at the Face to Face Meeting at 2:00 p.m.

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