

**Special Projects
Taxpayer Advocacy Panel (TAP)
Monthly Meeting Minutes
Thursday, May 18, 2023**

Designated Federal Officer (DFO)

- Frank Bustos 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 (Via Teams) |

Staff

- | | |
|--------------------------|-------------------------|
| • Frank Bustos | Acting TAP Director |
| • Antoinette “Toni” Ross | TAP Program Analyst |
| • Fred Smith | TAP Program Analyst |
| • Rosalind Matherne | TAP Program Analyst |
| • Sheila Andrews | TAS Executive Assistant |
| • Erin Collins | TAS NTA |
| • Kurt VanMatre | TAS SA Executive |
| • Mejbeen Balsara | IRS Analyst (W&I) |

Members of the Public

None

Welcome Announcements/Comments/Acknowledgements

Acting DFO Bustos welcomed all attendees and opened the meeting at 2:00pm ET.

Roll Call

Ross called roll and quorum was met.

Chair Welcome

Patterson welcomed everyone to the call.

Director and DFO Report Out

Bustos thanked everyone who was in DC for the Face-to-Face Meeting.

Thanking Patterson and Lammers who provided training at the F2F meeting on Wednesday, May 17, 2023.

Approval of Minutes

April 12, 2023, minutes for approval

Action: Minutes were not received in time for this meeting. Minutes will be approved at the June 14, 2023, full committee meeting

Chair Report Out

Patterson spoke about a lot of outreach events are going on at time. Partner with someone in your region; your area; LITC Director, Local Taxpayer Advocates and see if there are events that you could attend on TAP's behalf. It is also great to do some virtual outreach

Vice Chair Report Out

Green said to let her know if you need help in doing outreach. There are several ways you can conduct outreach: volunteer to write newsletters in your community; go to public events and do some TAP outreach, etc. Green also reminded members to go onto TAPSpace and record your activity on the activity record.

Subcommittee-1 Report Out (Lammers, Lead)

- Issue 59522- International Phone Apps: The members were going to do a rebuttal for this issue. Lammers reported, that after some research there was little TAP could do. She suggested that TAP should accept IRS response in its entirety.

Subcommittee-2 Report Out (Hall, Lead)

- 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.

Screening Report Out

The screening report was discussed in full during the Face-to-Face meeting before the Special Projects Full committee meeting. Each issues was discussed fully and below are the results for the **28** issues that were screened:

- Drop – 14 Issues
- Parking Lot – 22 Issues
- Associate – 1 Issue
- Transfer – 1 Issue

Action Items

Ross will do the following:

- Ensure that April 2023 meeting minutes are completed for review

Roundtable



Chair SP Committee Closing Comment

Closing

Bustos closed the meeting at 3:00pm ET.

Next Meeting: Wednesday, June 14, 2023 at 11:00 a.m.

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