

**Special Projects  
Taxpayer Advocacy Panel (TAP)  
Monthly Meeting Minutes  
Wednesday, June 14, 2023**

**Designated Federal Officer (DFO)**

- Cedric Jeans TAP East Chief

**Attendance**

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

**Staff**

- |                           |  |
|---------------------------|--|
| • Kevin Brown             | TAP Management Assistant                 |
| • Frank Bustos            | Acting TAP Director                      |
| • Conchata Holloway       | TAP Program Analyst                      |
| • Kelvin Johnson          | TAP Program Analyst                      |
| • Rosalind Matherne       | TAP Program Analyst                      |
| • Robert Rosalia          | TAP Program Analyst                      |
| • Antoinette "Toni" Ross  | TAP Program Analyst                      |
| • Fred Smith              | TAP Program Analyst                      |
| • Ann Tabat               | TAP Program Analyst                      |
| • Kudiratu Usman-Olugunna | TAP Program Analyst                      |
| • Mejbeen Balsara         | Wage & Investments (W&I) Program Analyst |
| • Cynthia "Cindy" Jones   | W&I Supervisor Program Analyst           |

**Members of the Public**

None

**Welcome Announcements/Comments/Acknowledgements**

Jeans welcomed all attendees and opened the meeting at 11:00am ET. Patterson reported the June newsletter is due June 22, 2023. Patterson reminded the members to submit their travel documentation for their travel vouchers. Patterson reminded the members that we have members attending the tax forums starting next month.

### **Roll Call**

Ross called roll and quorum was met.

### **National Office Report**

Bustos welcomed Jared Lefevre to the call. Bustos spoke about working with the National Taxpayer Advocate on the July report to Congress to require that IRS respond to our submissions within 45 days.

Bustos also reported that California taxpayers had been issued a requirement to pay their taxes in 21 days, but they have been reassured that as part of the disaster declaration, they have an extension to file and pay their taxes. Bustos asked the committee to share this information to anyone affected by this.

Bustos reported seeing taxpayers imprisoned because of fraudulent claims by scam artist that taxpayers are able to claim the Employee Retention Credit, even if they don't qualify for it. This is resulting in taxpayers being charged, convicted, and even incarcerated. Bustos asked that members educate the public that there are specific qualifications required for these credits, so they are not falling victim to these scams. The IRS submitted a report to Congress evaluating the Direct File project for the 2024 filing season. It looks like it is going forward in "The Direct File Project", more information will be coming out about this project.

### **DFO Report**

Jeans thanked the members who took the survey as it is used to improve the process. Send email with any changes you have if you did not take the survey.

### **Approval of Minutes**

April 12, 2023 minutes. Hall motioned; Green seconded.

May 18, 2023 minutes. Hall motioned; Birdsong seconded.

**Action: April and May Minutes accepted as edited.**

### **Chair Report**

Patterson requested a meeting with Green and Ross to work on the parking lot.

Chair Outreach report- Patterson will be doing some outreach with the local Stakeholder Partnerships, Education and Communication (SPEC) coming up. This is the Urban League of Metropolitan Seattle partnership.

JCC Report Out- [www.tapspace.org](http://www.tapspace.org) was slow but his issue has been resolved. Patterson sends a reminder to member to load your activity information regularly. Send any pictures to Angela Madison for outreach. We have the IP PIN issues that two other committees are working out. Patterson indicated that we may want to work with other committees to avoid duplicating their efforts. We are sending an issue related to the CP01A to the Notices and Correspondence committee.

The ICC is working on updating the Speak-Up brochures in two phases, to review the content and updating it. Phase two is looking at other languages and considering those sighted and unsighted as well.

Patterson attended the Washington, Ohio, Alaska Liaison practitioner's meeting and will share the topics they covered during this meeting. Patterson thanked the committee for making quorum.

### **Outreach Report**

Green reported:

Green spoke about outreach in Puerto Rico- spoke at a Volunteer Income Tax Assistance (VITA) conference and will share more information about this outreach event. The IRS had SPEC leader, "Marianne Incenso" and the area director from Atlanta, David Alito attended this event. The conference was phenomenal, and Green learned a lot at this event. Green is attending another event in November.

Outreach information from the National Vice Chair- Jeans suggested sending write-ups and pictures during community outreach events to share.

TAP Newsletter (Future Newsletter Articles)

Update your Activity Record

### **Subcommittee 1: Report out- Donna Patterson (Acting for Subcommittee-1 Lead)**

Issue 59522-International Phone Apps- Creating an international phone call back feature, so response will be accepted. Birdsong motioned; Tiongquico seconded. (Lillie encouraged bringing up IRS responses concerning the lack of funds to our proposals in the upcoming meeting with the Strategic Planning committee coming soon.)

**Action: Response accepted**

- Issue 63760-Retrieve IP Pin

New proposal to be transferred to Notices and Correspondence regarding notices going out annually to taxpayers.

Issue 63760 (Under a new Issue Number) will continue to be worked regarding online retrieval of the IP PIN.

### **Subcommittee 2: Report Out- Steven Hall**

- Issue 58722- Misleading Wording on Website

IRS updated website so this will go to Parking Lot to be reviewed next year.

- Issue 67583- Provide Clarity on Free File Pricing Under IRS.gov

During the subcommittee meeting, we noticed there could be confusion on who qualifies for this. These two issues took most of the time during the meeting.

The CP01A being worked also coupled with Issue 63760.

- Issue 51824- Estate Gift Tax  
Tabled to next meeting  
Patterson would like to focus on Issue 51824 next month.

### **Screening Report**

Screening Report Meeting will be scheduled for the week after next.

### **Internal Communications Committee Report Out- Donna Patterson (Acting for Rebecca Lammers)**

- Speak Up Brochure Review  
Patterson reported having two Ad Hoc meetings. Identified several areas to improve: all four sides, outside, front, and back cover.
  - Phase 1- Review and refresh brochure and deploy Quick Response (QR) readers.
  - Phase 2- Having the capability to write notes as well as adding other languages.
  - This should be coming the JC very soon.
- Facebook Admins

Looking for additional Facebook administrators so we always maintain control of the page and not lose it like we did before. Bustos thanked Patterson for her help with the ICC meeting and reported that a mockup should be ready by close of business this Friday for the committee to review.

### **Roundtable**

Tiongquico shared being happy about Rita Green's information in Puerto Rico for underrepresented taxpayers. Green acknowledged underserved or overlooked taxpayers really need to be represented and she always looks for opportunities to let taxpayers know they have a voice, and we are that outlet for their concerns. Hall asked are we going to work on the TAP website? Patterson stated the ICC works this issue and accepts recommendations from any TAP member. Patterson reporting her Liaison Practitioner call meets monthly and anyone can join if they want the experience.

### **Action Items**

Ross will do the following:

- Post April and May minutes.
- Meeting with Green and Patterson on the Parking Lot.
- Screening Report Meeting.
- Hall will write the newsletter article by June 22, 2023.

**Roundtable**

Ross reported Hannah Jair is new analyst for ICC, send newsletters to her.

**Chair or Vice Chair of SP Committee Closing Comment**

Patterson thanked the members for joining and having a great meeting. Jeans shared the next JC meeting will be June 26, 2023, at 3pm ET. Members are invited to attend. Jeans encouraged members to speak on collaborative efforts. Jeans reminded the committee that other committee subcommittee meetings require that you reach out to the committee chair to get invited to them.

**Closing**

Jeans closed the meeting at 11:41pm ET.

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

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