

**Special Projects
Taxpayer Advocacy Panel (TAP)
Monthly Meeting Minutes
Wednesday, July 12, 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 |
| • 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

- | | |
|---------------------------|--|
| • Frank Bustos | Acting TAP Director |
| • Kevin Brown | TAP Secretary |
| • Kelvin Johnson | TAP Program Analyst |
| • Rosalind Matherne | TAP Program Analyst |
| • Robert Rosalia | TAP Program Analyst |
| • Antoinette "Toni" Ross | 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

Roll Call

Quorum made.

Welcome Announcements/Comments/Acknowledgements

Patterson welcomed everyone to the call.

National Office Report

Bustos spoke about speakers from the tax forums being in process. Bustos indicated that TAP attendees would speak to each committee about the tax forums in the near future. The IRS submitted a report to Congress regarding the Direct File Operation. This will be a pilot project for the 2023 filing season. The

link to this report will be uploaded to www.tapspace.org. Bustos indicated that his detail as Acting TAP Director will be ending soon and thanked the committee for all that was done to help with this experience.

DFO Report

Jeans indicated our effort to try to brand TAP to more of a household name and make the website better at getting our message out. This starts with the news and events and outreach section. Please share stories, pictures, and a short report from outreach events to send this out to the public a lot more on the website. We also want to show some of the current work or active projects TAP is working on to increase public interest in TAP.

Approval of Minutes

June 14, 2023 meeting minutes. Lammers motioned; Green seconded.

Action: Minutes approved at submitted

Chair Report Out

- Chair Outreach report

Joint Committee (JC) meeting moved to July 17, 2023, no report yet.

- Members Leaning in

Patterson petitioned that members lean in and let someone know if you won't be able to complete tasks or attend meetings for coverage on these tasks.

- Extra JC Meeting on July 17 and 24, 2023 at 3:00 p.m. EST

Patterson asked could this be only one meeting. Bustos indicated that the referrals planned are rather large and this may mean the second meeting will be necessary. Jeans indicated that the bylaws normally call for monthly meetings and they are to comply with the National's Chair request to get as many referrals as possible out. The second meeting may not be very long.

- 1099-K Support

Please forward any feedback or additional information for this referral to Ross so this committee can consolidate for the TAP in respect to this project. Patterson requested assistance from Tiongquico and Ross with this matter.

- IP Pin Follow Up

Patterson indicated that research was done on how to retrieve the IP PIN online and this can be reviewed in subcommittee 2. Patterson indicated that the Issue 67718-Retrieve IP Pin pertaining to form CP01A was referred to Notices and Correspondence. Lammers will add anything else to this issue per Patterson's request.

Issue Assignments

Subcommittee 1 will be assigned the following issues to be worked:

- Issue 60604-Retirees Revealing Their SSN's
- Issue 63676-Video Conference Calls for US Taxpayers
- Issue 64665-Allow Amended Returns to have Direct Deposit

The subcommittee will attempt to work these issues for quick wins for these projects, per Patterson.

Subcommittee 2 will be assigned the following project to be worked:

- Issue 60606-Check Tracking System

Patterson suggested that the subcommittee do their due diligence before requesting a Subject Matter Expert (SME) for these issues.

Outreach Report

Green reported:

- IRS Tax Forums in New Orleans

Getting good feedback and traffic from attendees.

- TAP Newsletter (Future Newsletter Articles)

Green asked members to contribute to the newsletter and update your activity reports.

Subcommittee 1

- Issue 48336-Electronic filing of Form 8621 Information Return by a Shareholder of a Passive Foreign Investment Company or Qualifying Election Fund

Lammers reported the committee closed Issue 48336 the electronic filing for Form 8621. We are passing some international forms to Electronic Tax Administration Advisory Committee (ETAAC) to be made part of free filing as it is more suitable for them to handle.

- Issue 63760- IP Pin for Overseas Taxpayers

Will be worked soon, hopefully this month. Lammers will work with Patterson. Jeans will add an article to www.tapspace.org concerning this issue.

Subcommittee 2

Hall reported:

- Issue 51824- Estate Gift Tax

Issue will split in two. The current issue will focus on e-filing these forms and digitizing the instructions. Issue 68153 is the second issue will be about clarity on the Estate Gift Tax Form 706 and instructions and documents.

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

Green is finalizing the TAP referral for this issue.

- Issue 68153-Form 706 Estate Gift Tax Forms and Instructions
Patterson and Lammers will work this issue.

An email pertaining to the 1099K and instructions will be sent out to the committee, per Hall.

Screening Report

Ross will screen next week and is working on the next scheduled meeting.

Internal Communications Committee Report Out:

Patterson reported:

- Speak Up Brochure Review

Patterson reported this project has been overhauled all the way around. All four sides were updated including the picture on the front page. Phase two will have the Quick Response Code (QR) Code tying into the Taxpayer Bill of Rights (TBOR). This has made the brochure updated and more modern. Patterson praised the leadership of Richard Rodriguez and the committee and said this should be at the JC shortly.

- Facebook Admins

They are working to get administrators to maintain control of the page at all times. Lammers is working with Angela Madison to address these issues.

Roundtable

Patterson indicated we are looking for articles for outreach to be shared to the committee. Lammers spoke of the National Taxpayer Advocate (NTA) 2023 report to Congress. Part of this included the IRS' response to overseas taxpayer Most Serious Problems (MSPs). TAS recommended callback feature, and this was TAP Issue 59255 and the IRS is due to respond by August 31, 2023. The IRS exploring the callback feature in September according to the NTA's report.

Lammers had a call with practitioners and hearing their feedback was very useful. This research continues regarding the IRS not being concerned with reopening Tax attaches, embassies and consulates. Lammers attended a fourth of July event where she handed out lots of TBORs. Tiongquico will attend National Harbor Tax Forum. Tiongquico is disappointed with numerous issues affecting people and organizations with this pending 1099K issue and how many people will have their returns held up next filing season. There are more questions than answers and there will be more holdups next year.

Birdsong met with her Local Taxpayer Advocate (LTA) and will be visiting a Low-Income Taxpayer Clinic (LITC) soon. This is to get more acquainted with this organization. Tiongquico indicated that the Appropriations committee in Congress seems poised to slow down the free filing project with some of the requirement that they approve it first in the write up at this time.

Lillie spoke about tax issues from the tax forums:

1099K Series
1099Q Series
W-2 nonresident returns
Recent immigrant returns
How to become a certified acceptance agent (CAA)
ID protection and ID insurance
Send questions you want asked at the forums to Lillie

Patterson inquired about when the CAA program will come out of moratorium and Lillie will ask about this. Lammers asked when the Strategic Planning meeting will take place. Lillie does not know yet but will seek to find out.

Action Items

Ross will do the following:

- Post June 14, 2023 minutes.
- Screening Report Meeting set up for next week.
- Send new project proposals to subcommittees

Chair or Vice Chair of SP Committee Closing Comment

N/A

Closing

Jeans indicated we are working on the All TAP quarterly meeting; more information will come soon. The Joint Committee will meet on July 17, and 24, 2023. Jeans closed the meeting at 11:41pm ET.

**Next Meeting: August 10, 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.