

**Tax Forms & Publications Committee, (TFP)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, August 8, 2023**

Designated Federal Officer (DFO)

- Robert Rosalia Acting TAP East Chief

Members Present

- | | | |
|---------------------------|---------------------|---------------------|
| • Tor Daley | Anchorage, AK | Member |
| • Ellen Dickey | Dakota Dunes, SD | Member |
| • Joel Gelb | Brooklyn, NY | Member (Absent) |
| • Philip George | Saint George, UT | Member |
| • Kameelah Guthridge | Columbus, OH | Member (Absent) |
| • Charles Harvey | Albany, NY | Member (Absent) |
| • Jean Miller | Middletown, CT | Vice-Chair (Absent) |
| • Kimberly Pederzani | Barrington, IL | Member (Absent) |
| • Patricia "Pat" Thompson | Providence, RI | Chair |
| • Lucinda Weigel | Vienna, VA | Member |
| • Angela Madison | National Vice-Chair | Visiting Member |

Staff

- Kevin Brown TAP Management Assistant
- Cedric Jeans Acting TAP Director
- Kelvin Johnson TAP Program Analyst
- Ann Tabat TAP Program Analyst
- Mejbeen Balsara Program Analyst Wage & Investments (W&I)

Public Participants

None

Welcome/Opening– (DFO)

Rosalia opened the call and welcomed everyone on to the meeting.

Roll Call

Tabat completed roll and quorum was not met. All actions in the meeting were administrative and voting decisions were tabled until next month.

Welcome/Announcements/Comments/Acknowledgement of Citizens

Thompson welcomed everyone to the call.

National Office Report

Cedric Jeans reported he is the current Acting TAP Director since Frank Bustos' detail ended last month. Robert Rosalia will be the Acting TAP East Chief and Ann Tabat will be the analyst for the committee.

Jeans reported TAP has been asked to participate in a focus group regarding Individual Taxpayer Identification Numbers (ITIN)s and international taxpayers. A solicitation will be sent out soon for participants. The Joint Committee (JC) planning meeting will be held this month to work on the strategies for the next TAP year. Jeans advised to send any suggestions, ideas, or thoughts to be considered for the next TAP year to Thompson. The IRS has been recently in the news for its focus on transitioning to paperless. They are attempting to digitize all documents received by the public. The recent news release will be updated on www.tapspace.org.

DFO Report

Rosalia reported that TAP was listed in the National Taxpayer Advocate's (NTA) June report to Congress in objective six under the Systemic Advocacy section. The NTA discussed how TAP works with the IRS, specifically highlighting their response times and our workflow process. Rosalia asked the committee to help expand TAPs presence on www.improveirs.org by sharing any outreach events or projects that might be important to the public. This information can also be shared on TAPs social media site as well. Thompson indicated that the blurbs for our referrals can be used in the newsletter articles as well.

Committee News & Updates

TAP Committee Update

Awaiting IRS Responses

(With the JC for approval)

- **52664 – Form 3520 & F3520A (Foreign Trust) (LW)**
- **62742 – Form 8615 & Inst (Children Who Have Unearned Income)**

Thompson reported that the JC made a few edits to the referrals before approving and elevating them to the IRS for consideration. We are currently awaiting a response from the IRS. Thompson also reported that during the JC meeting the Notices and Correspondence committee had several issues returned to the committee with the suggestion to include additional notices that have similar language in the same referral. We might want to consider including forms that have similar language in our referrals moving forward.

Thompson inquired about the upcoming All TAP Quarterly meeting. Jeans indicated the meeting is still in planning stages and will be shared with the committee once it is

finalized. Thompson also indicated that we continue to be asked to reach out to our local Congress member as an option to find more outreach opportunities.

Approval of Minutes

June 13, 2023, minutes, no comments submitted. Tabled until next month.

July 11, 2023, minutes, no comments submitted. Tabled until next month.

Subcommittee 1

Daley reported:

- **55647** - Form 8915: Qualified Disaster Retirement Plan Distributions and Repayments

Daley thanked the subcommittee for all their work. The committee is making some last-minute edits and it should hopefully be ready for the JC next month.

- **57139** – Digital Assets/Crypto

This issue is currently being worked, we are including subcommittee 2 to review and add any additional suggestions. Our goal is to request that the IRS create a new publication and an updated section on the IRS website. The request for feedback, suggestions and recommendations will be sent to the entire TAP by the analyst via email. Rosalia advised the request needs to be presented in a clear and concise matter, so they fully understand what the committee is requesting.

Subcommittee 2

Weigel reported:

- **52596** - F1040 – (Rebuttal)

The IRS accepted several recommendations however a number were rejected. Thirteen rebuttals were prepared on rejected responses. The rebuttal is in the process of moving forward to the IRS having been previously approved by the committee according to Rosalia. Dickey inquired if the committee is expanding their review of this process. Thompson said not right now, but it can be included in a new project.

- **55265** - Form 2210: Underpayment of Estimated Tax by Individuals, Estates and Trusts

This issue is in working status to resolve taxpayer complaint, original grass roots issue indicated calculation on form was incorrect. We are proposing adding additional calculations to fix this issue.

- **64919** - Decedent

The committee is continuing work on this issue to make it easier for taxpayers who have loved ones who have died to communicate with the IRS. We are working on clarifying communication with tax compliance requirements and instructions.

2023 TAP Annual Report (Committee Check List)

Blurbs to be Assigned:

No additional blurb assignments at this time.

Screening Report

N/A

Parking Lot:

54759 - Form 8888 & Inst (Assigned to Subcommittee 1 as preparatory work)

Outreach Report

Thompson suggested everyone keep their activity report up to date, so our activity is accounted for. Please reach out to your Local Taxpayer Advocate (LTA) for outreach opportunities. Thompson asked members to contact the Outreach Committee members: Rick Rodriguez, Rebecca Lammers, Angela Madison, and provide a summary of your outreach activities that can be shared with the public via our Facebook page.

Thompson said the ICC is preparing letters to thank the public for offering suggestions. They are also looking to reach out to reporters and members of the public to let them know we are available to assist with matters concerning the IRS and about www.tapspace.org. They are also reviewing the media guide, the working at a booth, the one-minute TAP dance presentation.

ICC Updates/Newsletter

- Thompson reported the newsletter articles are due August 22, 2023.
- Updated Speak-Up brochure completed.
- Lammers provided Facebook administration training.
- They are working with the IRS on improvements to www.tapspace.org.

Action Items

- Approval of minutes tabled until next month.
- Subcommittee 2 digital assets issue will be sent as pre-reads.
- Subcommittee 1 will start prep work on Form 8888.
- Rebuttal Issue 52596 will be sent to IRS for reconsideration.

Chair Closing Comments & Round Table

Madison thanked Thompson for speaking about social media. Madison asked members to share any outreach events and note if they are public facing so we can properly identify the events and you may include a photo. Jeans advised to post images of individuals there is a photo release form once signed and submitted grants acceptance to use the photo in an IRS product. The form will be sent to the entire TAP by their committee analyst and posted to www.tapspace.org. Rosalia inquired about who would complete the newsletter. Daley will work with Weigel to complete this task.

Closing

Rosalia thanked everyone for joining and closed the meeting at 11:40am ET.



The next monthly meeting
September 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.