

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
August 28, 2023**

Designated Federal Official (DFO)

- Cedric Jeans Acting TAP Director

Members Present

- Denise Besson Chair, Taxpayer Communications Committee
- Debra “Debbie” Kurita Chair, Toll-Free Phone Lines Committee
- Eugene “Gene” Lillie National TAP Chair
- Angela Madison National TAP Vice-Chair
- CJ Mills Chair, Taxpayer Assistance Center Committee (TAC)
- Donna Patterson Chair, Special Projects Committee
- Patricia Thompson Chair, Tax Forms and Publications Committee
- Kristin Gentile White Chair, Notices and Correspondence Committee
- Melanie Almeida Internal Communications Committee (ICC)
- Richard “Rick” Rodriguez ICC Chair (Absent)

Staff

- Kevin Brown TAP Management Assistant
- Conchata Holloway TAP Program Analyst
- Susan Jimerson TAP West Chief
- Rosalind Matherne TAP Program Analyst
- Matthew O’Sullivan TAP Program Analyst
- Robert Rosalia TAP Program Analyst
- Antoinette “Toni” Ross TAP Program Analyst
- Fred Smith TAP Program Analyst
- Ann Tabat TAP Program Analyst
- Mejbeen Balsara Program Analyst Wage and Investments (W&I)

Members of The Public

None

Welcome

Jeans welcomed everyone and opened the call at 3:00pm ET.

Roll Call

Quorum was met for the meeting.

Welcome/Review Agenda/DFO/National Office Update

Lillie welcomed everyone and reviewed the agenda.

National Office Update

Jeans reminded the members of the JC Annual Planning meeting on tomorrow which these will be the topics:

- Committee activities and accomplishments.
- Challenges and ways to improve them in each committee.
- End of year strategies for committee work.
- Attendance strategies for end of the year work.
- Outreach strategies

Jeans suggested getting feedback from their committees before this meeting. Jeans acknowledged the work and effort for members attending the tax forums and thanked them for the issues they have brought to the TAP as a result. Jeans reminded everyone of the All TAP meeting this Friday and encouraged everyone to attend. We will have our Low-Income Taxpayer Clinic (LITC) partners; Stakeholder Partnerships, Education & Communications (SPEC) partners; and the Taxpayer Advocate Service (TAS) Communications partners at this meeting. This will be in an effort to promote outreach.

Jeans indicated that we will have two more Ad Hoc meetings next month with the TAP, and taxpayer perspective. Jeans thanked everyone for their participation in these meetings.

TAP Managers Update

Rosalia requested articles for outreach to be posted to the www.improveirs.org. The Tax Forms and Publications committee had continued trouble meeting quorum. Kim Pederzani resigned, and Joel Gelb will stay until the end of this year to help our efforts to make quorum for the committee.

The committee is working on digital assets and descendant issues. Notices and Correspondence committee is working on the 20 top problematic notices. Taxpayer Communications redesign project. Both committees are working together on these projects. They also had Sarah Berry and Eric Koo resign for various reasons.

Jimerson reported Hannah Jair moved on to a new position outside of TAP. O'Sullivan will head ICC committee as the analyst. The new Speak up brochure is in production and an electronic version is on www.tapSPACE.org today. There was a question about attrition and the staff indicated some resignations are normal, but we can discuss ways to address this at the planning session on tomorrow.

Approval of August and October JC Meeting Minutes

Approval of July 24, 2023, JC Meeting Minutes. Slight corrections were made to the wording. Kurita motioned; Patterson Seconded.

Action: Minutes approved as edited.

TAP Chair Report

Lillie spoke about working on a critique of TAP and recommendations on how to operate and improve in the future. The recruitment efforts was chief on this project. The position being on

www.usajobs.gov is confusing to applicants. Lillie reached out to members not attending meetings and was able to get them to participate more. The total count of TAP members today is 54 according to Jeans.

Vice Chair Report

Madison greeted everyone and celebrated the top five members up to date with their activity reports. There is some lag with the inputs but there should not be any duplicate entries at this time. Patterson inquired about blank lines after inputs have been made. Almeida spoke about deleting them and entering new rows manually. Jeans and Johnson will research this issue.

Madison reported 1520 hours of outreach this year, which is trending higher from last year. We are looking to maybe double last year's number. Madison challenged the Vice-Chair's to review each member's activity report and provide other resources that can be used to increase outreach efforts. Madison reported there are seven administrators for the Facebook page with six who post content. We need to start posting and Madison wants the information to be accurate.

White reported attending the San Diego tax forum with Almeida. The forum was sold out with thousands of participants. We tried to get applicants for future TAP years. Much of the time was spent explaining how to submit referrals on www.improveirs.org. Practitioners could not distinguish TAP from TAS. We spent time explaining who we are. Almeida reported repeat visitors asking more questions and engaged in conversations about TAP. Madison said we should make sure to know the difference between TAS and TAP and how we work with them during outreach like this. Madison thanked White and Almeida for attending the forum despite the threat of a hurricane. After speaking to the TAS staff, White suggested our table being next to TAS next year. We should also be allowed to at least introduce ourselves during any future events moving forward. Jeans asked this to be an action item.

Public Comments

N/A

Project Committee Review/Activities

Taxpayer Communications

Denise Besson reported Issue 66193- Effectively Measuring Outreach Defining the Indirect Outreach Measures.

This referral aims to assess the reach of activities that lack measurable indicators such as distributing flyers and posting on social media. We are suggesting Quick Response Codes (QR) and survey links for such cases. Patterson suggested paper surveys as a way to measure participation. Mills indicated that TAC approached this from an opposite perspective. Mills thought we should have known two committees had the same issue. Kurita noted that this committee was asked how to measure outreach while the TAC was asked what to measure.

Besson said they also suggested website, social media analytics or Uniform Resource Locator (URL) tagging to better understand the frequency and types of interactions with outreach materials. Patterson suggested video views also. Patterson motioned; Kurita seconded.

Action: Issue elevated as edited to IRS for consideration

Almeida said they are working on a referral for the IRS to set up a process for an easier way to update bank account and mailing address for direct deposited refunds that have been rejected.

Toll Free Lines

Kurita reported eight active issues being worked, with one or more that should be ready for next month. Hold time complaints have gone down significantly over the last several months which Kurita thanked the IRS for their efforts. Kurita said that they are doing outreach in a target rich environment with a Senior Resource Day completed with TAS recently.

Tax Forms and Publications

Thompson reported working an issue regarding digital assets, where the committee is recommending a publication be made for this topic. They are working on Form 8915- *Qualified Disaster Retirement Plan Distributions*. Both of these, hopefully, will be ready next month. The committee is working on form 2210- *Underpayment of Estimated Tax by Individuals*. They are looking at issues related to a decedent. They are working on Form 8888- *Allocation of Refund (Including Savings Bond Purchases)*. Patterson would like to work on the descendant issue since both committees are working on this topic. White offered to assist with this issue also.

White suggested reviewing IRS Issue 2023-08, titled Not All Powers are the same.

Notices and Correspondence

Kristin Gentile White reported almost being done working on CP80 and CP503. We have been reviewing what is a series of forms or not and will respond accordingly to this committee. We are almost done with Letter 4883C; Letter 5071C; and CP14. We are almost done with Letter 4314C; CP13; and CP12. After reviewing a response for Letter 3030C, we will be issuing rebuttals for several of the issues. We are working on CP2000 series and five other letters. The IRS approached us about excessive stuffers, which we will work on the top 10 of these to be worked in the near future. Johnson provided an amazing workflow spreadsheet, which allows us to be effective with all of our work. Lillie asked to share the Spreadsheet with TAP. This committee has about nine active referrals being worked.

Taxpayer Assistance Center Improvements

CJ Mills reported four new issues being worked:

1. Limited Volunteer Income Tax Assistance (VITA) locations for international taxpayers.
2. American with Disability Act (ADA) accessibility to TACs.
3. VITA site parameters of income limits for free tax help for persons with disabilities.
4. Longer TAC hours.

Mills noted the similarity they have to Issue 66193 and how this committee took a different approach to it. Our recommendations focus on taxpayer education and accessibility of information. We will take a different perspective and bring that forward to the JC soon.

We will be sending two issues to ICC, one concerning the public's accessibility to TAP meetings, and the other outreach materials being provide to VITA sites. Mills reported an issue from 2021

about accessibility to TAC offices, which is awaiting a response. We are pushing for this delayed response. This committee has about six active referrals being worked.

Lillie asked for an extension of 15 minutes for this meeting to get everything covered.

Action: By unanimous consent, the committee agreed to a 15-minute extension.

Special Projects

Patterson thanked all members who gave feedback on the 1099K project. Rene Tiongquico reported this plus Secure 2.0 were big topics at the National Harbor tax forum. Patterson reported subcommittee 1 working the following issues:

- Issue 60604 Retiree Revealing Social Security Numbers
- Issue 63676 Extending Video Conferences for International Taxpayers
- Issue 64665 Allowing Amended Returns to Have a Direct Deposit

Subcommittee 2 has several issues that are currently being reviewed:

- Issue 41535 TAC Practitioners Revealing Personally Identifiable Information (PII)
- Issue 51824 now 68153- Estate Gift taxing
- Issue 67583 Provide Clarity on Free Filing Pricing
- 68581 Expand VITA programs and services.
- 60606 Check Cashing- dropped.

We have five to eight issues in September. Patterson got 10 recommendations at a recent outreach event.

Internal Communications Committee

Almeida reported the committee is discussing the two issues the Mill and TAC sent. For any content recommendations, please send them to Rick Rodriguez and Angela Madison. Almeida noted that members can now share their email address and phone on www.tapspace.org site.

Action Items:

- Post Speak-Up Brochure to www.tapspace.org.
- Post July 24, 2023 minutes.
- Ask members to check the weather before attending tax forums.
- Include paper survey added to Issue 66193.
- Ask the tax forum event planner to have TAP next to TAS next year.
- Consider an Ad Hoc JC meeting for October or November.

Round Table

Lillie wants members to be prepared for having two meetings at the end of the year because of all the referrals that may be ready at the end of the year. Mills shared a PowerPoint to form a TAP Ad Hoc Bylaws committee. Mills explained the purpose and all the details of this proposal for the committee to be formed. The committee will review proposed amendments and forward to the TAP director. Mills moved for the formation of a TAP Bylaws committee; Patterson seconded the motion.

Action: By unanimous consent the TAP Ad Hoc Bylaws committee has been formed.



Lillie suggested everyone be safe with the turmoil going on all around the nation.

Closing

Jeans thanked everyone for joining and closed the meeting at 4:45pm

Next Joint Committee Meeting September 25, 2023, at 3:00pm

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