

**Special Projects
Taxpayer Advocacy Panel (TAP)
Monthly Meeting Minutes
Wednesday, August 9, 2023**

Designated Federal Officer (DFO)

- Robert Rosalia Acting TAP East Chief

Attendance

- | | | |
|----------------------|-----------------------|-----------------|
| • Shequeila Birdsong | Amherst, NY | Member (Absent) |
| • 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 |
| • Donna Patterson | Bothell, WA | Chair |
| • Rene Tionguico | Washington, D.C. | Member |

Staff

- | | |
|---------------------|--|
| • Cedric Jeans | Acting TAP Director |
| • Conchata Holloway | TAP Program Analyst |
| • Kelvin Johnson | TAP Program Analyst |
| • Rosalind Matherne | TAP Program Analyst |
| • Robert Rosalia | TAP Program Analyst |
| • Ann Tabat | TAP Program Analyst |
| • Mejbeen Balsara | Wage & Investments (W&I) Program Analyst |

Members of the Public

None

Welcome/Opening/Acknowledgment of Public Citizens

Robert Rosalia opened the call and welcome everyone who joined.

Roll Call

Quorum made.

Welcome Announcements/Comments/Acknowledgements

Patterson welcomed everyone to the call and thanked the members for having a great month. Patterson indicated we be voting on about five issues for this call. Green is excited we have quorum and able to move forward.

National Office Report

Cedric Jeans reported being the Acting TAP Director since Frank Bustos' detail ended last month. Robert Rosalia will be the Acting TAP East Chief and Ann Tabat will fill in behind Rosalia on the Tax Forms and Publications committee.

Jeans reported TAP being asked to work on a focus group regarding Individual Taxpayer Identification Number (ITIN)s and international taxpayers. A solicitation will be sent out soon for participants. Jeans expects this committee to be part a focal part of this task.

The Joint Committee (JC) planning meeting will happen this month to plan for the focus for the next TAP year. Please send any suggestions, ideas, or thoughts you want presented during this session to Patterson to be considered for next year. The IRS is in the news for trying to go almost paperless. They are trying to digitize all documents that are received. They are pushing taxpayers to establish an online account so they can see activity regarding their taxes in real time. We will put the news release on www.tapspace.org.

Jeans said now is a good time to push to get issues out so they can be included in the Annual Report to increase the TAP activity.

DFO Report

Rosalia asked the committee to help us expand our presence on www.improveirs.org by sharing any outreach events or projects that might be important to the public. This can also be shared on our social media site as well.

Rosalia reported that TAP was listed in the National Taxpayer Advocate's (NTA) June Objectives Report to Congress in objective six under the Systemic Advocacy section. The NTA spoke a bit about how TAP works with the IRS, specifically their response times and our workflow process. The Conversation With America is what the project is called with a focus on international taxpayers and a bit about topics like cryptocurrency.

Approval of Minutes

July 12, 2023 meeting minutes. Lammers motioned; Hall seconded.

Action: Minutes approved at submitted

Chair Report Out

- JC Meeting - Patterson reported on the two JC minutes on July 17, 2023, and July 24, 2023, and a few referrals that were reviewed. She reported that the Special Projects will be receiving consolidated feedback for 1099k project. Patterson, Tiongquico, and Ross will be heading this project. The Internal Communications Committee had the Speak up Brochure reviewed which was approved by the JC.
- Patterson thanked the Screening Committee for their hard work There were 267 items screened in these meetings.
- National Tax Forum - Tiongquico reported that 1099K is a big issue. Tiongquico asked for anyone getting responses from the field related to this issue

to bring it to his attention. There were some tax changes related to Secure 2.0, Tiongquico will share more with the committee later.

- Challenges with the Activity Record Input - We are still seeing some latency delays on the website. Another challenge is items input not saving and leaving blank lines. Send these issues and the ID numbers to Ross and Johnson. The activity reports can be emailed to your analyst as a last effort to record your activity.
- Issue 66194-1099-K Third Party Payment Networks - Patterson thanked Tiongquico for his efforts at the forum.

Outreach Report

Patterson reported meeting with the Seattle Metropolitan Urban League Service Community Day coming up on August 19, 2023. Rosalia reminded Patterson to get pictures and write something for the newsletter about this event.

Green reported:

- IRS Tax Forums in New Orleans

Will have pictures from the events and will share with the committee.

- TAP Newsletter (Future Newsletter Articles)

Green asked members to share articles to be used for the newsletter.

- Update your Activity Report

Have the old spreadsheet that can share with new members.

Subcommittee 1

- DRAFT TAP Referral for **Issue 64665**-Allow Amended Returns to have Direct Deposit - Lammers will be adding feedback before this referral is pushed forward.
- DRAFT TAP Referral for **Issue 68153**-Expand Volunteer Income Tax Assistance (VITA) Programs that Service International Taxpayers - Green worked on the draft and Lammers will add feedback before next meeting.
- **Issue 63676**-Video Conference Calls for US Taxpayers - Lammers reported this issue being expanded to include an inquiry on reopening tax attaches offices. We will share this with subcommittee 2 once we are done.
- **Issue 63760**-IP Pin and Number for Overseas Taxpayers - Members added the international number, and this should be ready for draft before the next subcommittee meeting.
- **Issue 60604**-Retirees Filing Tax Return to Prevent Fraud (Dropped by Committee) - Not a systemic issue, Lammers motioned to drop; Green seconded.

Action: Issue dropped due to being non-actionable

Subcommittee 2

Hall reported:

- DRAFT TAP Referral for **Issue 67583**-Provide Clarity on Free File Pricing Under www.irs.gov.

Green motioned; Hall and Lammers seconded.

Action: Issue will be elevated to JC for consideration after review from the Attorney Advisors and Systemic Advocacy

- DRAFT TAP Referral for **Issue 68153**-Form 706 Estate Gift Tax Forms and Instructions

The goal is to ensure the form and the instructions are easily understandable to taxpayers. Green motioned; Hall and Lammers seconded.

Action: Issue will be elevated to JC for consideration after review from the Attorney Advisors and Systemic Advocacy

- DRAFT TAP Referral for **Issue 41535**-Tax Practitioners Revealing Their PII

The goal is eliminating Personally Identifiable Information from being required by practitioners. Green motioned; Hall and Lammers seconded.

Action: Issue will be elevated to JC for consideration after review from the Attorney Advisors and Systemic Advocacy

- **Issue 51824**- Estate Gift Tax (Committee still working issue)

The committee is still working this issue.

- **Issue 60606**-Check Tracking System (Dropped by Committee)

Hall motioned; Lammers seconded.

Action: Issue dropped due to being non-actionable

Screening Report

Patterson reported 169 issues screened: 16 parking lot; 153 dropped; 41 TAS as individual issues.

Internal Communications Committee Report Out:

Lammers reported hosting a Facebook social media administrator training session on July 25, 2023. We are organizing a posting schedule for the page.

Patterson added that Rick Rodriguez reported there was no budget to approve behind the scenes functions for www.tapspace.org, which makes this not suitable product for TAP to do its job on. The JC will be making recommendations about this during the JC meeting.

Roundtable

Tiongquico reported TAP continues to be confused with Taxpayer Advocate Services (TAS). Hall spoke about the Pacific Northwest Action meeting. They spoke about the need for modernization for IRS website. They plan to make it easier do some basic functions like name or address changes. They were vague about when these changes will take place. Patterson can set anyone else up to attend this meeting if they'd like to attend. Lammers going to a Taxes in A Pub



event for this week and will take pictures. Patterson is honored, excited, and thrilled for all the work members are getting done. Green shared that the confusion between TAP and TAS gave an opportunity to speak to taxpayers about TAP and an opportunity to join the committee next year.

Action Items

Johnson will do the following:

- Post minutes from July 12, 2023.
- Send Issues **67583**; **68153**; and **415350** to JC. (Pending Review AA and SA Review)
- Dropped Issues 60604 and 60606.

Chair or Vice Chair of SP Committee Closing Comment

N/A

Closing

Rosalia closed the meeting at 11:59pm ET.

Next Meeting: September 13, 2023

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