

**Special Projects
Taxpayer Advocacy Panel (TAP)
Monthly Meeting Minutes
Wednesday, September 13, 2023**

Designated Federal Officer (DFO)

- Antoinette “Toni” Ross Acting 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 (Absent) |
| • Rebecca Lammers | International/ London | Member |
| • Jared Lefevre | Billings, MT | Member |
| • Donna Patterson | Bothell, WA | Chair |
| • Rene Tiongquico | Washington, D.C. | Member (Absent) |
| • Eugene Lillie | National Chair | Visiting Member |

Staff

- Fred Smith Acting TAP Director
- Kelvin Johnson TAP Program Analyst
- Fred Smith TAP Program Analyst
- Ann Tabat TAP Program Analyst
- Kudiratu Usman-Olugunna TAP Program Analyst

Members of the Public

None

Welcome/Opening/Acknowledgment of Public Citizens

Toni Ross opened the call and welcome everyone who joined.

Roll Call

Quorum not made. This meeting will be administrative in nature.
At approximately 11:37am a fifth member of the committee joined the meeting and quorum was met.

Welcome Announcements/Comments/Acknowledgements

Patterson welcomed everyone to the call and thanked the members for having a great and productive month.

National Office Report

Fred Smith thanked everyone who joined the call. Smith reported a new Most Serious Problem (MSP) focus group focused on appeals and possibly set to take place on September 26, 2023, at 2:00pm ET. Susan Jimerson emailed a solicitation for members to the Annual Report committee. Please respond to that

email if you are interested in joining that committee. Smith noted that most of the staff will be in training next week and there will be delays in responding most of next week. Smith reminded the committee to make a push to get as much done as possible since we only have two meetings left. Smith reminded everyone to properly complete their activity reports especially for the graduating members.

DFO Report

Ross indicated that the MSP appeals solicitation will come from Ann Tabat and the Annual Report solicitation will come from Jimerson.

Approval of Minutes

The August 9, 2023 meeting minutes are tabled to next month.

Lammers motioned; Birdsong seconded. Minutes approved as submitted.

Action: Minutes approved as submitted.

Chair Report Out

- JC Meeting

CJ Mills soliciting one person from each committee to join the bylaws review committee. Please send a note to Patterson if you are interested in joining this committee.

- Thank the screening Committee for their hard work

We reviewed 267 issues and Patterson thanked the members who helped push this through. Several issues were sent to the Taxpayers Assistance Center Improvements committee and the Internal Communications committee as a result.

- National Tax Forum

Patterson indicated there were numerous items to be reviewed as possible tax issues as the voice of the taxpayer.

- By Laws Ad Hoc Committee

Patterson reminded everyone that one person from each committee can join.

- Annual Report Committee

Patterson mentioned that anyone can join this meeting and it is a great project to work on.

- TAP Referral Issue 66194-1099-K Third Party Payment Networks

Patterson encouraged all who can attend this meeting tomorrow to attend. This form will be issued on payments that are received and not payments that are made. The focus of this will be business to business and personal to business payments and will not include payments to or from personal accounts. Patterson indicated that it is too late for us to make any suggestions to changes to the form for this upcoming tax year. There will be three blogs that the attorneys will put out as a result of this work.

Patterson submitted 10 projects proposals for next year at the JC planning meeting as a result of the work this committee has done this year. Patterson also

spoke of several outreach events she will be participating with both in person and virtually.

Patterson spoke of several different outreach. Articles will be provided for each of these events after they occur.

Outreach Report

- Please continue to do Outreach

Green encouraged members to keep doing outreach as it is important for taxpayers who could use free tax preparation for Volunteer Income Tax Assistance (VITA) and other free services. Green will attend a workshop next week to talk about tax and IRS stuff that consumers can take advantage of.

- Update your Activity Record

Please update your activity records to show all the TAP work you have done.

- TAP Newsletter (Future Newsletter Articles)

Please submit newsletter articles that you have and any pictures you have for these events.

Subcommittee 1

- DRAFT TAP Referral for **Issue 68581**-Expand VITA Programs that Service International Taxpayers

This referral seeks to Expand VITA/Tax Counseling for the Elderly (TCE)/Low Income Taxpayer Clinics (LITC) to include international taxpayers.

Lammers motioned; Green seconded.

Action: Issue elevated to JC for consideration pending SA/AA Review

- DRAFT TAP Referral for **Issue 63676**-Provide IRS Customer Service Options at Embassies and Consulates

Lammers acknowledged this as being tabled but encouraged any additions or changes from the committee to make them better. Ross will send these to Systemic Advocacy (SA) and Attorney Advisors (AA) for review.

This referral seeks to expand in-person or virtual coverage for international taxpayers and their families and to expand the number of international TAP members to two. Lammers motioned; Birdsong seconded.

Action: Issue elevated to JC for consideration pending SA/AA Review

- DRAFT TAP Referral for **Issue 64665**-Allow Amended Returns to have Direct Deposit
- Project Proposal for **Issue 63760**-IP Pin Letter for Overseas Taxpayers
- Project Proposal for **Issue 68951**-Increase Program Project Transparency per SOP

- Project Proposal **Issue 68956**-Amended Tax Returns for Qualifying Surviving Spouses
- Project Proposal **Issue 68958**-Delay in 1099 K Changes

Lammers indicated that these will be reviewed in the next subcommittee meeting.

Subcommittee 2

Patterson reported:

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

This is in review by SA and AA.

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

We are awaiting response from IRS.

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

This is tabled for October meeting.

- Project Proposal for **Issue 51824**- Estate Gift Tax

This issue was closed and associated with Issue 68153 Per Patterson.

- Project Proposal for **Issue 68952**-Consolidate 1099-Misc and 1099-NEC

This is a new issue that will be worked in October.

- Project Proposal for **Issue 68955**-Remove IP Pin Income Limit

This is a new issue that will be worked in October.

Screening Report

Birdsong reported we have completed 85 issues (18- Parking Lot and 65 Dropped, out of the dropped issues-19 submitters were sent TAS information); 1 referral to Notices and Correspondence; and 1 issue associated with an active issue.

Internal Communications Committee Report Out:

Lammers reported ICC Meeting

- www.TAPSpace.org Content/the Outreach Toolkit

This work is ongoing.

- Facebook Content

This work is ongoing. Lammers reported working on listing TAP meetings on this site for public access to these meetings. Lammers has worked with members that may have needed assistance regarding posting on the Facebook page.

Patterson added the committee is reviewing the outreach toolkit for improvements.

Roundtable

Green asked for the status of the recruitment period. Smith indicated we are doing background checks and approvals and expect an announcement by January or February of next year. Green spoke of several local outreach events

that she recently completed where she should be able to speak on what TAP can do for the public. Birdsong is looking to work with her Local Taxpayer Advocate (LTA) soon.

Lammers shared an outreach in Montreal Canada outreach where the online IRS account and paperless correspondence was the topics discussed. Lammers worked with the Puerto Rico LTA for online problem-solving day for October 25, 2023. Lammers is speaking with the Hawaii LTA the same type of event, but no date has been determined yet. Lillie spoke of the importance of the Appeals MSP project. This process opens a lot to taxpayers. Lillie thanked the entire committee for all the great work they are doing this year.

Action Items

Ross will do the following:

- Post minutes from August 9, 2023.
- Issue 68581 elevated to JC.
- Issue 63676 elevated to JC.

Chair or Vice Chair of SP Committee Closing Comment

Patterson solicited volunteers for the newsletter.

Closing

Ross closed the meeting at 11:53am ET.

**Next Meeting: September 13, 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.