

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
October 23, 2023**

Designated Federal Official (DFO)

- Shawn Collins 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
- Richard “Rick” Rodriguez Chair, Internal Communications Committee (ICC)
- Cheryl Crowe Member, Notices and Correspondence Committee (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 Acting TAP East Chief
- Antoinette “Toni” Ross TAP Program Analyst
- Ann Tabat TAP Program Analyst
- Mejbeen Balsara Program Analyst Wage and Investments (W&I)
- Becky Noble Program Manager Systemic Advocacy (SA)

Members of The Public

Michael Stewart

Welcome

Jeans welcomed everyone and opened the call at 3:00pm ET. Jeans introduced Shawn Collins as the new Acting TAP Director.

Roll Call

Quorum was met for the meeting.

National Office/DFO Update

Jeans noted the agenda would be changed to address the volume of issues being presented in today’s meeting to allow us to prioritize the referrals. Collins introduced herself as a former TAP

Director and in numerous positions throughout TAS and the IRS. Collins looks forward to ensuring TAP is committing good recommendations to the IRS, improve recruitment, outreach, and other important TAP issues.

Welcome/Review Agenda/DFO/National Office Update

Lillie welcomed everyone and recognized the need to get to the issues for approval before any other committee business. Lillie recognized Mr. Stewart from the public on the call.

Project Committee Review/Activities

Tax Forms and Publications

Thompson presented Issue 57139 Digital Assets/Cryptocurrency for consideration. This issue seeks to have a publication related to digital assets be made by IRS for guidance to the public.

Referral 2673 Patterson requested clarity for this referral.

Referral 2695 Patterson sent suggestions via email for clarity with this referral.

Referral 2696 Mills suggested clarifying language to this referral and shared the suggestions via chat. Thompson motioned; Kurita seconded.

Action: issue elevated to the IRS as edited

Special Projects

Patterson presented Issue 68153 Estate Gift Tax. This issue seeks to reduce frustration and confusion to provide more compliance and allow taxpayers to dispute incorrect IRS information. All recommendations were in support of clarity and editing for a better flow of the document. Patterson accepted all edits as suggested to the referral. Patterson motioned; Mills seconded.

Action: Issue elevated to the IRS as edited

Toll Free Lines

Kurita presented Issue 69432 On-Line Live Chat Feature. This issue seeks to improve customer service through applying available technology.

Referral 2741 Mills inquired about possible disclosure and delegation of authority issues. Mills recommended rewording this part to avoid issues with the referral. Patterson recommended consideration to time zones as it relates to referral 2740 from a cost perspective. Kurita indicated this was considered, but the recommendations will be considered. Patterson suggestion referral 2743 read artificial intelligence/live agent to help this referral. Kurita motioned; White seconded, subject to the corrections and suggestions made.

Action: issue elevated to the IRS as edited

Issue 66274 1040 Toll Free Phone Line -- On-Hold Messages. This issue seeks to improve customer service through applying available technology by possibly changing the on-hold music. Kurita indicated the focus is on what would improve the customer service experience with a change possibly to the music. Patterson suggested changing the justification to provide better flow. Patterson suggested other clarifying language for better flow for the referrals to read and

flow better. Mills suggested adding instructions on how to make an appointment in the message. White suggested flexibility to select your on-hold music like Apple offers.

Kurita requested clarity from White for her suggestion. Mills suggested allowing taxpayers to be able to select the genre of music they hear while on hold.

Kurita acknowledged the title of this referral be changed to 1040 Toll-Free Phone Lines On-Hold Music and Messages. Kurita motioned; Mills seconded.

Action: Issue elevated to the IRS as edited.

Internal Communications Committee

Rodriguez presented Issue 69169 Addition of “SPEAK UP” Brochure” and information to VITA/TCE and LITC locations order forms and VITA/TCE Handbook. This issue seeks to add the Speak-Up brochure to the VITA and Tax Counseling for the Elderly (TCE) document ordering options for these sites. The Taxpayer Bill of Rights (TBOR) Publication 1 and the TAS Form 911 Request for Taxpayer Advocate Service Assistance (And Application for Taxpayer Assistance order) will also be added. Holloway indicated some suggestions that did not change the recommendation or meaning of this issue were accepted. Kurita offered corrections, edits and clarity via email for the issue. Mills suggested a grammatical correction. Rodriguez motioned; Patterson seconded.

Action: issue elevated to the IRS as edited.

Notices and Correspondence

White presented issue 63395 CP2000. This issue seeks to review and make recommendations to enhance the taxpayers experience and make it easier for them to be compliant with the tax laws. White accepted most of the changes from Thompson and Kurita by email. Some of these changes included removing contractions, and passive voice. Some referrals were for direct and smaller paragraphs, so taxpayers know what they are reading and the seriousness of this letter. Patterson asked for Quality Review (QR) for spellcheck and grammar. Thompson suggested that the notice be called, “Notice of proposed changes” instead of “Proposed Changes” for clarity. The date the project was opened and approved was suggested to be added to the issue.

Notice of proposed changes instead of proposed notice, clarity requested by Thompson. Date project was opened and approved by the project committee to be added to this project by Lillie. Rosalia provided that information. White motioned; Besson seconded.

Action: Issue accepted as edited for elevation to the IRS

Issue 68461 Letter 483C Potential Identity Theft During Original Processing. This issue seeks to review and make recommendations to enhance the taxpayer’s experience. White noted grammatic and formatting changes. White motioned; Rodriguez seconded.

Action: Issue accepted as edited for elevation to the IRS

Taxpayer Communications

Issue 48868 Updating Taxpayer Financial Institution (FI) & Mailing Address Information. This seeks to have the IRS provide clear information for taxpayers to change personal information online. Besson motioned; Rodriguez seconded.

Action: issue elevated to the IRS as edited

Lillie suggested considering Patterson's recommendation for another possible referral.

Taxpayer Assistance Center Improvements

N/A

Approval of August and October JC Meeting Minutes

Approval of September 25, 2023, JC Meeting Minutes. Mills motioned; Patterson Seconded.

Action: Minutes approved as submitted.

TAP Chair Report

Lillie suggested reading the Commissioner's press release of the Schedule C for Sole Proprietorships report. Lillie will have this shared on the Facebook page.

TAP Vice-Chair/Outreach Report

N/A

Action Items:

- Forms and Pubs. elevated issue 57139.
- Special Projects elevated issue 68153.
- Toll Free elevated issues 69432 and 66274.
- ICC elevated issue 69169.
- Notices elevated issues 63395 and 68461.
- Communications elevated issue 48868.
- There is an additional JC meeting on November 17, 2023, at 3:00pm ET.
- Post minutes from September 23, 2023.

Public Comments

Mr. Stewart said this was an impressive body of work from his perspective.

Round Table

Mills advised everyone about the TAP Bylaws Committee work is in progress and hope to be ready for the next meeting. Patterson said they have four referrals that are in QR with AA/SA and possibly ready for next month. Rodriguez discussed creating a question bank for the improveirs.org site. Send questions for this to ICC. Tomorrow is the informational session for candidates at 1:00pm ET. Patterson has issues uploading activity reports in tapspace.org. Holloway suggested reaching out to the analyst.

Closing

Collins thanked everyone for joining and closed the meeting at 4:28pm.

Next Joint Committee Meeting November 17, 2023, at 3:00pm

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