

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
November 16, 2023**

Designated Federal Official (DFO)

- Susan Jimerson Acting TAP Director

Members Present

- Denise Besson Chair, Taxpayer Communications Committee (Absent)
- 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
- Steven Hoffman Member, Notices and Correspondence Committee
- Rebecca Lammers Member, Special Projects Committee

Staff

- Kevin Brown TAP Management Assistant
- Conchata Holloway TAP Program Analyst
- 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
- Becky Noble Program Manager Systemic Advocacy (SA)

Members of The Public

None

Welcome

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

Roll Call

Quorum was met for the meeting. Holloway requested that ID numbers be added to any amendments via the chat feature for upcoming issues during this meeting.

Review Agenda/Acknowledge Members of the Public

Lillie indicated that we would focus on the issues first then see what other agenda items can be address the same way we did the last meeting. Lillie indicated we will not have a shutdown.

Project Committee Review/Activities

Special Projects

Patterson congratulated the incoming TAP leadership for next year. Patterson accepted all edits and changes by email and within the chat and will update them before the issue goes to IRS.

Patterson presented Issue 66194 Form 1099-K Third Party Payment Network Changes. Patterson indicated that all edits will be incorporated into the issue with a final version that will be sent, by Holloway, to the committee before the issue is elevated to the IRS. This will be the format for all issues being presented today. Patterson motioned; Kurita seconded.

Action: Issue elevated to the IRS as edited

Issue 68581 Expand VITA, TCE and LITC Programs for International Taxpayers. The edits were sent via email, and in the chat, were all accepted by Patterson. Holloway will send the updated issue via email for the committee to review. Patterson motioned; Mills seconded.

Action: Issue elevated to the IRS as edited

Issue 63760 IP PIN for Overseas Taxpayers. The edits were sent via email, and all accepted by Patterson. Holloway will send the updated issue via email for the committee to review. Patterson motioned; Mills seconded.

Action: Issue elevated to the IRS as edited

Issue 68951 Increase Transparency. The edits were sent via email, and all accepted by Patterson. Holloway will send the updated issue via email for the committee to review. Patterson motioned; Kurita seconded.

Action: Issue elevated to the IRS as edited

Issue 63676 Increase Transparency of the Strategic Operations Plan (SOP) project roll out. The edits were sent via email, and all accepted by Patterson. Holloway will send the updated issue via email for the committee to review. Patterson motioned; White seconded.

Action: Issue elevated to the IRS as edited

Notices and Correspondence

White presented issue 66990 Excessive Inserts & Stuffers. The purpose of this issue was to determine what could be removed from the package mailed to taxpayers. "I" was changed to "we" in the referral for better grammar. White motioned; Mills seconded.

Action: Issue elevated to the IRS as edited

Issue 68350 Letter 5071C or LTR 6331C Potential Identity Theft During Original Processing with Online Option. The "I" was removed from ID 2858. Patterson suggested, in ID 2857, giving taxpayers the option to go online or make the phone call for taxpayers that may have limited access to the internet. White motioned; Mills seconded.

Action: Issue elevated to the IRS as edited

Issue 52425 CP12 Math Error Notice with Overpayment of \$1.00 or More. Thompson recommended removing the parentheses from ID 2703 and removing ID 2701 for clarity and flow. White motioned; Kurita seconded.

Action: Issue elevated to the IRS as edited

Issue 64824 CP 13. White said this issue seeks to address a credit claimed due to miscalculation and remove the “amount due” from the summary of this letter. White indicated that contraction were removed from ID 2720. Mills suggested changing ID 2715 to a more taxpayer friendly tone. White declined this based on the fact that there may not be an error. White indicated it will read, “...we believe an error...” to soften the tone. “We may have found an error...” is the agree language for the ID. White motioned; Mills seconded.

Action: Issue accepted as edited for elevation to the IRS

Tax Forms and Publications

Thompson presented Issue 55647 Form 8915-F: Qualified Disaster Retirement Plan Distributions and Repayments. This issue seeks to change the wording on the form and the instructions for better understanding for the taxpayer when completing this form. Thompson accepted the edits received via email for this issue. Thompson motioned; White seconded.

Action: issue elevated to the IRS as edited

Toll Free Lines

Kurita presented Issue 61907 Dashboard Data for Where’s My Refund? Kurita indicated the objective of this referral is to take advantage of technology to improve the customer service experience. There were some grammatical corrections that were accepted to allow the issue to flow better. Kurita motioned; Patterson seconded.

Action: issue elevated to the IRS as edited

Taxpayer Assistance Center Improvements

Mills presented Issue 66143 Taxpayer Communication- Recordkeeping. This issue came from Stakeholder Partnerships, Education & Communication (SPEC). This issue seeks to get information out to taxpayers, so they understand the importance of maintaining tax paperwork to prevent identity theft. Mills said there is lots of information out there, but we would like it to be in a singular area. One recommendation is to make taxpayers a partner of the Security Summit so their point of view can be considered regarding identity theft issues. This could be done by adding a member of TAP in this summit.

Mills said the rest of the recommendations have to do with accessibility and how easy it is to locate this information. There could be a link to this information added to the website. There should be a way to make searching for this information easier on the www.irs.gov website. Patterson suggested considering Artificial Intelligence (AI) in addition to search terms. Patterson also suggested adding a rolling marquee to the landing page under something like a “news you can use” link on the website. Mills motioned; Kurita seconded.

Action: Issue elevated to the IRS as edited.

Taxpayer Communications

Holloway reported wrapping everything up for the year with no referrals this month. They are working on a possible issue for next year. Issue screening has been completed and the returning members were advised to continue outreach during the down time. The issue number is 51118.

Internal Communications Committee

Rodriguez working on issue on Tuesday about solidifying the process of issue suggestions, adding them to the minutes and memorializing them for future TAP committees to work on. Lillie recommended considering getting issues from Treasury Inspector General for Tax administration (TIGTA), Taxpayer Advocate Services (TAS), Systemic Advocacy Management System (SAMS), the taxpayer liaison and a number of other sources for picking up issues.

Lillie spoke about getting the new Speak-Up brochures for future outreach. Brown said he will get the information to Holloway, so the committee knows how to get them.

Approval of October JC Meeting Minutes

Approval of October 23, 2023, JC Meeting Minutes. Mills motioned; Madison Seconded.

Action: Minutes approved as submitted.

National Office/DFO Update

Jimerson reported the graduation ceremony is on November 28, 2023, at 1:00pm ET. Jimerson thanked everyone for all of their work and reminded the committee of the next JC meeting on November 27, 2023, at 3:00pm ET.

TAP Chair Report

Lillie met with national director of the taxpayer liaison group at an outreach event. Lillie reported the process is changing to allow the data matching a lot sooner to reduce the delay of refunds or to give taxpayers a chance to fix issues and reduce delays in processing returns. This will be a more customer friendly approach to doing taxes now. They are heading toward data verifying for child tax credits much sooner than they do now also. This will mean faster refunds and other matters being resolved much sooner and improving the customer experience.

TAP Vice-Chair/Outreach Report

Madison indicated being grateful for the referrals that we completed today and thanked everyone for all their work. The committee worked like a well-oiled machine, and it is for the American taxpayers. Madison thanked everyone who ran for next year's leadership and congratulated Kurita and Brookens.

Action Items:

- Special Projects elevated issues: 66194; 68581; 63760; 68951; and 63676.
- Notices elevated issues: 66990; 68350; 52425; and 64824.
- Forms and Pubs. elevated issue 55647.
- Toll Free elevated issue 61907.
- TAC elevated issue 66143.

- Post minutes from October 23, 2023.

Public Comments

None

Round Table

Mills reported the Ad hoc Bylaws committee is working hard but is not sure if their recommendations will be ready before the next JC meeting. Mills indicated they would at least like to give a proposed notice at the next JC meeting but understands they will go to the TAP Director before this happens. Mills and Lillie requested the count for the election from Becky Noble, who indicated, that information will be given to the committee as soon as it is available.

Lillie thanked Shawn Collins who helped a TAP member attend an outreach event in South Carolina with senator Lindsey Graham and two other senators. A portion of her expenses was covered for this outreach event. Madison reported providing out of the box outreach opportunities to include an eight-hour event with a number of high-profile individuals where was able to speak about TAP. Madison will provide local events for any TAP member who requests it. Lammers thanked all the committees for their support on international issues. This has made her job much easier this year.

Closing

Jimerson thanked everyone for joining and doing such excellent work and closed the meeting at 4:28pm.

Next Joint Committee Meeting November 27, 2023, at 3:00pm

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