

**Special Projects
Taxpayer Advocacy Panel (TAP)
Monthly Meeting Minutes
Wednesday, October 11, 2023**

Designated Federal Officer (DFO)

- Robert Rosalia Acting TAP Director

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 (Absent) |
| • Eugene Lillie | National Chair | Visiting Member |

Staff

- | | |
|--------------------------|--|
| • Kelvin Johnson | TAP Program Analyst |
| • Priscilla Medrano | 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/Opening/Acknowledgment of Public Citizens

Robert Rosalia opened the call and welcome everyone who joined.

Roll Call

Quorum was made.

Welcome Announcements/Comments/Acknowledgements

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

National Office Report/DFO Report

Rosalia reminded the committee to get the referrals that are close to complete done before the TAP year ends. This includes screening also. Rosalia reported since the year is coming to an end October 24, 2023, we will be looking for new leadership and suggested members start thinking about their interest in a

leadership position within TAP there will be a meeting for those interested in becoming a Chair or Vice-Chair for next year. This meeting will discuss leadership skills and responsibilities that comes with taken on these duties. There will be an opportunity to either nominate or self-nominate after this meeting. Then campaign statements are released and a meet the candidates meeting will be held. Balloting will be held from November 3-9, 2023. Meeting invites will be sent soon and everyone, regardless of their interest in the positions should attend.

Approval of Minutes

The September 13, 2023, meeting minutes were approved Lefevre motioned; Green seconded. Minutes approved as submitted.

Action: Minutes approved as submitted.

Chair Report Out

Patterson reported:

- The Vice-Chair will run the November 8, 2023, Full Committee Meeting
- Steven Hall will be on the Annual Report Committee from our committee.
- Patterson will send the annual report draft to Green and Hall by October 13, 2023.
- Joint Committee (JC) Meeting
 - TAP Referral for **Issue 68153**-Form 706 Estate Gift Tax Forms and Instructions will be sent to the JC analyst for the October 2023 agenda.
 - TAP Referral **Issue 66194**-1099-K Third Party Payment Networks will be sent to AA/SA for their review.

Patterson reminded members to update their activity reports. Patterson will join the Bylaws Committee.

Outreach Report

Green reported:

- Please continue to do Outreach.
- TAP Newsletter (October Newsletter Articles due before 10/25/2023).
- Update your **Activity Record**.

Subcommittee 1

Lammers reported:

- TAP Referral for **Issue 68581**-Expand VITA Programs that Service International Taxpayers. Awaiting Attorney Advisors (AA) and Systemic Advocacy (SA).
- TAP Referral for **Issue 63676**-Provide IRS Customer Service Options at Embassies and Consulates. Awaiting AA and SA Review.
- Project Proposal for **Issue 63760**-IP Pins for Overseas Taxpayers. Working on the draft referral for this issue.

- Project Proposal for **Issue 68951**-Increase Program Project Transparency per SOP. Working on the draft referral for this issue.
- Project Proposal **Issue 68956**-Amended Tax Returns for Qualifying Surviving Spouses. Tabled for more research to be done.
- Project Proposal **Issue 68958**-Delay in 1099 K Changes

Patterson motioned to close as combine and associated with Issue 66194; Hall seconded.

Action: Issue 68958 closed as combine and associated with issue 66194

Subcommittee 2

Hall reported:

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

The work will continue on this issue.

- Project Proposal for **Issue 68952**-Consolidate 1099-Misc and 1099-NEC
Patterson motioned to drop; Hall seconded.

Action: Issue dropped

- Project Proposal for **Issue 68955**-Remove IP Pin Income Limit
Patterson motioned; Hall seconded combine and drop with issue 63670

Action: Issue closed as combined and associated with issue 63670

Screening Report

Screening report scheduled for October 19, 2023.

Internal Communications Committee Report Out:

Lammers reported ICC working Issue 68481 email list for upcoming TAP meetings and access to documents.

- ICC Meeting
- TAPSpace Content/the Outreach Toolkit
- Facebook Content

Roundtable

Lammers worked with Puerto Rico Local Taxpayer Advocate (LTA) on an online problem-solving day with many issues resolved that day and others requiring follow-up. Lammers will do this again with the Hawaii LTA soon, with about 43 people already signed up. Patterson will attend this meeting also. Ross thanked the committee for making quorum throughout the entire year.

Action Items

Ross will do the following:

- Post minutes from September 13, 2023

- Issue 66194 will be forwarded to SA/AA for review
- Issue 68958 dropped and associated Issue 66194
- Issue 68952 dropped
- Issue 68955 dropped and associated with Issue 63670.
- Patterson to get the annual report draft to Green and Hall
- Lammers to forward LTA Hawaii meeting to Patterson

Chair or Vice Chair of SP Committee Closing Comment

Patterson thanked the committee for excellent work and an excellent year. Rosalia reminded the committee there needs to be an article that may be shared during the off time for TAP.

Closing

Rosalia closed the meeting at 11:38am ET.

Next Meeting: November 8, 2023, at 11:00 am

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