

**Tax Forms & Publications Committee, (TFP)  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Tuesday, November 14, 2023**

**Designated Federal Officer (DFO)**

- Cedric Jeans                                      Acting TAP Director

**Members Present**

- |                           |                  |                 |
|---------------------------|------------------|-----------------|
| • Tor Daley               | Anchorage, AK    | Member (Absent) |
| • Ellen Dickey            | Dakota Dunes, SD | Member          |
| • Joel Gelb               | Brooklyn, NY     | Member          |
| • Philip George           | Saint George, UT | Member          |
| • Kameelah Guthridge      | Columbus, OH     | Member (Absent) |
| • Charles Harvey          | Albany, NY       | Member          |
| • Jean Miller             | Middletown, CT   | Vice-Chair      |
| • Patricia "Pat" Thompson | Providence, RI   | Chair (Absent)  |
| • Lucinda Weigel          | Vienna, VA       | Member          |

**Staff**

- |                   |  |
|-------------------|--|
| • Kevin Brown     | TAP Management Assistant                 |
| • Robert Rosalia  | TAP Program Analyst                      |
| • Antoinette Ross | TAP Program Analyst                      |
| • Ann Tabat       | TAP Program Analyst                      |
| • Mejbeen Balsara | Program Analyst Wage & Investments (W&I) |

**Welcome/Opening**

Cedric Jeans opened the call and welcomed everyone on to the meeting.

**Public Participants**

None

**Roll Call**

Brown completed roll and quorum was met.

**Welcome/Announcements/Comments/Acknowledgement of Citizens**

Miller welcomed and thanked everyone for joining the call.

**Committee New & Updates**

- **57139** – Digital Assets/Crypto – Approved by Joint Committee (JC) October 23, 2023, with minor edits.
- **55647** - Form 8915: Qualified Disaster Retirement Plan Distributions and Repayments- Systemic Advocacy feedback received; with minor updates Referred to JC for November 16, 2023, meeting.

### **Approval of Minutes**

October 10, 2023, minutes. Dickey motioned; Weigel seconded.

**Action:** October minutes accepted as submitted.

### **National Office Report/ DFO Report**

Jeans thanked the members for their efforts this year on the committee. Jeans encouraged the returning members to join the leadership for the next TAP year. The graduation program will be on November 28, 2023, at 1pm ET for third year members rotating off TAP. A solicitation email will be issued requesting committee preference for next year. Jeans suggested members consider coming back to this committee, but members have an option to change if they prefer. An end of the year survey will be issued, please complete it as the staff will use the feedback to highlight things well done and make corrections to advance and improve the program.

Jeans reminded the committee to continue outreach through the down time. The staff will be available to assist with anything you need including supplies and scheduling meetings. Jeans reminded members to update the activity reports with completed TAP work through 2023. Please log into [www.tapspace.org](http://www.tapspace.org) for updates from the staff. Debra Kurita is the 2024 National Chair and Michelle Brookens will be the incoming 2024 Vice Chair, please congratulate them. We are working on the Annual Report, Tabat or Thompson may reach out for support with this project. The report is shared with National Taxpayer Advocate (NTA), the Commissioner; the Department of Treasury; and the Ways & Means committee in Congress. Jeans thanked Thompson and Miller for their leadership this year.

### **Awaiting IRS Responses**

Tabat reported:

- **52664**-Form 3520 & F3520A (Foreign Trust) Awaiting a response from IRS.
- **52596** - F1040 – (Rebuttal)- The IRS requested extension until November 15, 2023, to respond. We are still awaiting response.

### **Subcommittee 1**

Dickey reported:

- **62742** – Form 8615 & Inst (Children Who Have Unearned Income) – Rebuttal completed with responses to five non-adopted recommendations and will be sent to the IRS.

Weigel requested clarity on recommendation ID 2513 rebuttal response. The wording of the issue was updated with, “Instructions from...” for clear language. Weigel will send a change in verbiage recommendation via email to Tabat. No vote needed as this is a rebuttal.

- **54759**-Form 8888 & Instructions-Allocation of Refund (Including Savings Bond Purchases). Completed awaiting Systemic Advocacy(SA) & Attorney Advisor (AA) review; vote on referral to JC contingent upon their review.

Issue ready for vote. Dickey motioned; Weigel seconded.

**Action:** Issue elevated to JC contingent upon SA & AA response.

### **Subcommittee 2**

Weigel reported:

- **64919** – Decedent Issues completed, Quality Review completed, vote on referral to JC contingent upon SA & AA review.

Issue ready for vote. Dickey motioned; Harvey seconded.

**Action:** Issue elevated to JC contingent upon SA & AA response.

- **55265** - Form 2210: Underpayment of Estimated Tax by Individuals, Estates and Trusts

The issue will be carried over into the 2024 TAP year.

### **2022 TAP Annual Report (Committee Check List)**

Blurbs Assigned:

**64919**- Decedent-Charles Harvey agreed to complete write-up.

**54759**- Form 8888-Ellen Dickey agreed to complete write-up.

### **Screening Report**

Tabat thanked all who helped review the screening reports and attend the meetings.

- Screened 227 issues in October & November.
- Added 17 new issues to the Parking Lot.
- 31 to be transferred to other TAP committees.
- 132 were dropped.
- 42 to associate with current parking lot issues.
- We may request an Ad hoc meeting prior to the start of 2024 TAP year.

### **Outreach Report**

#### **Activity Report**

Update and report all time spent on www.TAPSpace.org time and please include all TAP related issues. Keep up Outreach activities during the down time.

### **ICC Updates/Newsletter**

Miller reported:

The Issue 69169 concerning Speak Up brochures for Volunteer Income Taxpayer Assistance (VITA) & Low-Income Taxpayer Clinic (LITC) sites were elevated to JC. Direct public to [www.Improveirs.org](http://www.Improveirs.org) committee page for meeting updates and times. Facebook postings have been scheduled weekly through February 2024. Newsletter – Due November 20, 2023. Dickey and Harvey volunteered to complete write ups for the December Newsletter.

### **Action Items**

- October minutes approved to be posted.
- Issue 54759 and 64919 elevated to the November 27, 2023, JC meeting.
- Issue 62742 rebutted for elevation back to the IRS
- Update Systemic Advocacy Management System (SAMS) with screening determinations.

### **Chair Closing Comments & Round Table**

Miller spoke about the members accomplishments and volunteer efforts this year in focus groups which included the 1099-K project, the Chips program, the TAP/TAS Chatbot project; and 1040 instructions. The committee elevated six referrals with 195 commendations. Miller thanked the third-year members for all their efforts before they graduate off the panel. Weigel thanked everyone for a great experience. Rosalia thanked the committee for all the hard work this year.

### **Closing**

Tabat thanked everyone for joining and closed the meeting at 4:01pm ET.

**The next monthly meeting  
TBD**

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