

**Special Projects
Taxpayer Advocacy Panel (TAP)
Monthly Meeting Minutes
Wednesday, November 8, 2023**

Designated Federal Officer (DFO)

- Robert Rosalia Acting TAP East Chief

Attendance

- | | | |
|----------------------|-----------------------|-----------------|
| • Shequeila Birdsong | Amherst, NY | 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 Tiongquico | Washington, D.C. | Member |

Staff

- | | |
|--------------------------|--|
| • Kelvin Johnson | TAP Program Analyst |
| • Priscilla Medrano | Acting TAP Director |
| • Antoinette “Toni” Ross | 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

Green welcomed everyone to the call and thanked the members for joining.

National Office Report/DFO Report

Rosalia thanked everyone for their participation and recognized the third-year members who will be graduating on November 28, 2023, at 1pm ET. Rosalia encouraged returning members to consider taking on leadership roles for next year. Rosalia asked members to complete the survey when they receive it, check their emails during the down time and to continue to do outreach during this same period.

Rosalia reported that voting for next year's leadership will go until November 9, 2023, and the results will be shared on Monday, November 13, 2023. The Annual Report is being worked at this time. Lammers inquired about doing outreach if there is a government shutdown. Rosalia stated that no government work is to be completed if the government shuts down, but there would be guidance shared with the panel should the need arise for it.

Approval of Minutes

The October 11, 2023, minutes were considered for approval. Lammers motioned; Patterson seconded. Minutes approved as submitted.

Action: Minutes approved as submitted.

Chair Report Out

Green reported:

- IRS Response received on Issue 61344-Foreign Retirement Account **Response Under Consideration**. Lammers has additional information to support the issue if it is needed. Ross and Rosalia indicated the committee can prepare a rebuttal as a response to the IRS' position which can be done without the need for the Joint Committee (JC) approval. Tiongquico suggested tempering our expectations on the purpose of this rebuttal. Rosalia clarified the options are accept, rebut, or create a new project. Lammers will draft a response and send it to the committee to consider.

- JC Meeting - TAP Referral for **Issue 68153**-Form 706 Estate Gift Tax Forms and Instructions. Issue has been accepted by the JC and was forwarded to IRS.
- TAP By Law Meeting is ongoing and progressing well
- TAP Referral **Issue 66194**-1099-K Third Party Payment Networks. Referral voted on to move forward to the JC. Patterson motioned; Lammers seconded.

Action: Elevated to JC for consideration

Outreach Report

Green reported:

- Please continue to do Outreach. Guidance will be pending should there be a government shutdown.
- TAP Newsletter (October Newsletter Articles due before November 25, 2023). Hall will do this month's article.
- Update your **Activity Record**.

Subcommittee 1

Lammers reported:

- TAP Referral for **Issue 68581**-Expand VITA Programs that Service International Taxpayers. This issue will be forwarded to the JC for the November agenda.
- TAP Referral for **Issue 63676**-Provide IRS Customer Service Options at Embassies and Consulates. This issue will be forwarded to JC for the November agenda.
- Referral for **Issue 63760**-IP Pins for Overseas Taxpayers. The IRS just launched this option to taxpayers so recommendation number four will be removed. Patterson motioned; Lammers seconded.

Action: Issue elevated as amended for JC consideration

- Referral for **Issue 68951**-Increase Program Project Transparency per SOP. Patterson motioned; Green seconded.

Action: Issue elevated to JC for consideration.

- Project Proposal **Issue 68956**-Amended Tax Returns for Qualifying Surviving Spouses. Issue going to Parking Lot.

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, and it will go in the Parking Lot for next year.

Screening Report

Lammers reported on the October 19, 2023, meeting:

- There were 49 issues screened, of which 43 issues were dropped and 13 were forwarded to TAS.
- Two Issues were referred to other committees.
- Four Issues were placed in the Parking Lot.

Internal Communications Committee (ICC) Report

Lammers reported:

- ICC Meeting – Issue 68169-Speak Up Brochure at VITA. Final draft was sent out for view and approved by JC forwarded to IRS.
- www.TAPSpace.org Content; the Outreach Toolkit
- Facebook Content. A posting schedule has been established into next year.

Roundtable

Tiongquico encouraged the committee to keep up to what IRS is doing regarding regulatory efforts. This impacts how the IRS enforces the tax code. Tiongquico said we should also take the wins when we can and know more about the regulatory part. Green encouraged members to review the Federal Register for possible issues that TAP can respond to. Patterson thanked the committee for all of its work this year and for working well with her. Green echoed Patterson's words and also encouraged members read up on the Memorandum of Understanding (MOU) for the Free File Program to know what it says regarding our issue. Green said it was a good three years. Green will continue to do outreach via her social media page and encourage the public to join TAP.

Ross thanked the third-year members and wished them good luck. Ross thanked Patterson and Green for all her leadership and work. Ross is proud of the committee for always making quorum. Lammers thanked all the third-year members and Patterson and Green for their leadership. Lammer thanked Tiongquico for the expertise as it was needed for the success of the committee. Lammers is looking forward to next year and will be helping to find other international members to join TAP.

Action Items

Ross will do the following:

- Post minutes from October 11, 2023.
- Update SAMS on issues from the Screening Committee.
- Forward Issues 68581; Issues 63676; Issue66194; Issue 63670; and Issue 68951 to JC Analyst for the November agenda.

Chair or Vice Chair of SP Committee Closing Comment

Green thanked the committee for a great meeting and encouraged the graduating members to join future meetings as members of the public.

Closing

Rosalia thanked everyone for all their work this year and reiterated members can join meetings as a member of the public, and outreach can be done during down time. Rosalia closed the meeting at 11:49am ET.

Next Meeting: TBD

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