

**Tax Forms & Publications Committee, (TFP)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Thursday, March 14, 2024**

Designated Federal Officer (DFO)

- Cedric Jeans TAP East Chief

Members Present

- | | | |
|---------------------------|----------------------|-----------------|
| • Jason Brinkley | Prince Frederick, MD | Member |
| • Robert “Rob” Calloway | Stockbridge, GA | Member |
| • Jason Crispin | Toms River, NJ | Member |
| • Ellen Dickey | Dakota Dunes, SD | Chair |
| • Joel Gelb | Brooklyn, NY | Member (Absent) |
| • Kameelah Guthridge | Columbus, OH | Member (Absent) |
| • Jean Miller | Middletown, CT | Vice-Chair |
| • Joseph Parampathu | Irvine, CA | Member |
| • Patricia “Pat” Thompson | Providence, RI | Member |
| • Donald Williamson | Bethesda, MD | Member |
| • Debra Kurita | Visitor | National Chair |

Staff

- | | |
|---------------------|--------------------------|
| • Kevin Brown | TAP Management Assistant |
| • Shawn Collins | Acting TAP Director |
| • Conchata Holloway | TAP Program Analyst |
| • Ann Tabat | TAP Program Analyst |

Public Participants

None

Welcome Announcements/Comments/Acknowledgements

Jeans opened the call and welcomed everyone to the meeting.

Collins welcomed everyone and thanked them for joining TAP.

Kurita welcomed everyone to the call and is looking forward to working with everyone throughout the new TAP year.

Self-Introductions/Roll Call

The TAP staff and TAP members each shared a self-introduction and provided their biography. Quorum was met.

TAP Mission

Jeans reviewed the TAP mission and the basic functions of TAP. The TAP listens to taxpayers, identifies taxpayers’ issues, and makes suggestions for improving IRS

service and customer satisfaction. Jeans explained that the public is invited to attend our calls and may be in attendance in future meetings.

TAP reviews notices and correspondence to ensure they are easily understood by taxpayers. Jeans emphasized this is where TAP resolves issues raised by the public. Jeans reviewed the six TAP project committees and explained their purpose.

Jeans reviewed the charter as TAP is an agency sponsored organization and what we do to keep our charter active.

- Commit to volunteer time
- Identify grassroots issues
- Prepare annual report

TAS

- Funding
- Support staff
- Designated Federal Officers (DFO)

TAP Success Stories

- Longer extension of time to file taxes.
- Recommendations for improvement to numerous tax forms and publications.
- Separate lessons for Affordable Care Act in Pubs 4012 & 4491, related to Volunteer Income Tax Assistance (VITA) and Taxpayer Counseling for the Elderly (TCE) Training.
- IRS Inform taxpayers currently in active Earned Income Tax Credit (EITC) audits of hours of availability and “live examiner” options.
- Recommended the callback feature to the toll-free lines.

Project Committees Responsibilities

- Work issues assigned from TAS or the IRS
- Work with IRS program owners and Subject Matter Experts (SMEs)
- Screen new issues

Recommendations

Decide whether to pursue an issue, transfer it to another committee, or drop it.

Focus on customer service improvement.

Should be fully developed, clearly written and significant for the taxpaying public.

Support Staff

- Appoint DFO for the project committees
- Work with the panel and IRS to promote efficient project committees
- Facilitate communication among all parties involved in the committee

- Final review of recommendations referrals to ensure that all information matches the database
- Research and analysis of issues
- Facilitate communication between IRS and TAP
- Review of referrals for structure and content
- Assist members in meetings
- Consolidate outreach reports
- Prepare travel documents/reimbursements
- Help to develop TAP products such as Annual Report, Speak up Brochures, ImproveIRS.org and more

Jeans advised additional training will be provided during the in-person meeting in May of 2024.

TAP Meeting Procedures

- Ground Rules

Listen to the ideas and opinions of your fellow panel members and give everyone the time to speak their minds.

Stay within the allowed meeting time.

Respect and be courteous to all members and staff.

Participate and take part in this process.

- Telephone & E-Mail Etiquette

Please arrive five minutes ahead of your call.

Identify yourself.

Limit the side bar conversations.

Mute yourself when not speaking.

Participate and don't get discouraged.

Do not reply all or cc everyone unless necessary.

Consider others time and feelings during these meetings.

- Minutes/Minutes Approval

Please review the meeting minutes, agendas, and pre-reads prior to each meeting. The Chair, DFO and analyst will complete and provide agendas before each meeting.

- Establish Quorum & Consensus

50 percent plus one is quorum. Committee has ten members, six is needed to make quorum.

Documents will be shared via MS Teams live document sharing for review

- Agenda & Pre-Read Information

Will provided via email and posted on www.tapspace.org.

- Activity Reports/Time Reporting

www.tapspace.org; www.improveirs.org;

- Methods of Communication
Email, telephone, fax, and MS Teams

So, you want to be a Chair

Tabat provided an overview of the responsibilities and expectations of committee Chair and Vice Chair. Chair runs the committee and is on the JC committee; the Vice Chair helps lead the committee and is on the Outreach Committee; Subcommittee leads run each subcommittee.

Nominations and Election process (Chair/Vice-Chair)

- Nominate Candidates

Pat Thompson nominated Ellen Dickey for Chair. Dickey accepted the nomination. Pat Thompson nominated Jean Miller for Vice-Chair. Miller accepted the nomination. All nominees ran unopposed and were unanimously elected by the committee.

Dickey assumed control of the meeting.

Approval of Minutes

November 14, 2023, Parampathu motioned; Williamson seconded.

Action: November minutes approved as submitted.

Establishment of Subcommittees and Meeting Dates

- Full Project Committee Meeting Second Thursday at 2:30pm ET
- Subcommittee 1 self-nominated- First Tuesday 3pm ET; Dickey (Lead), Gelb, Guthridge, Parampathu, Williamson
- Subcommittee 2 self-nominated- First Wednesday 3pm ET; Rob Calloway (Lead), Brinkley, Crispin, Miller, Thompson
- Outreach (Vice-Chair) Miller
- Screening Members-Brinkley, Thompson, Calloway, Parampathu, Williamson
- Quality Review (QR)-Williamson, Parampathu, Miller
- Internal Communications-Williamson, Back-up Miller

2024 Project Committee Work

- **Issue 55265**-Form 2210-Roll over from 2023 (Sub 2)
- **Issue 55984**-Form 8938 Statement of Specified Foreign Financial Assets (Sub 1)
- **Issue 60161**-Form 1040-NR Nonresident Alien (Sub 1)
- **Issue 55239**-Form 8962 & Premium Tax Credit (Sub 2)

Tabat showed the project proposals, explained the process and research involved in reviewing a proposed issue.

Action Items

- Post November 2023 minutes.
- Tabat to send pre-reads for subcommittee work the following week
- Tabat to send out recurring invites for the monthly and subcommittee meetings.

Jeans reminded the committee the importance of meeting quorum as it allows the committee to do the work of the public. If quorum is not met, the committee is not able to move work forward.

Committee Chair and vice Chair Closing Comments

Dickey thanked everyone for quickly getting through the work we did today. Kurita congratulated the leadership and looks forward to working with the committee this year.

Closing

Collins congratulated leadership and looks forward to working with the committee this year. Jeans thanked everyone for joining and closed the meeting at 4:02pm ET.

**The next monthly meeting
April 11, 2024, at 2:30pm EST/1:30pm CST/12:30pm MST/11:30am**

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