

**Tax Forms & Publications Committee, (TFP)  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Thursday, April 11, 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          |
| • Kameelah Guthridge      | Columbus, OH         | Member (Absent) |
| • Jean Miller             | Middletown, CT       | Vice-Chair      |
| • Joseph Parampathu       | Irvine, CA           | Member          |
| • Patricia “Pat” Thompson | Providence, RI       | Member (Absent) |
| • Donald Williamson       | Bethesda, MD         | Member          |

**Staff**

- |                   |  |
|-------------------|--|
| • Kevin Brown     | TAP Management Assistant                 |
| • Shawn Collins   | Acting TAP Director                      |
| • 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**

Dickey thanked and welcomed everyone for joining the call.

**National Office Report**

Collins reminded the members April 15, 2024, is the filing deadline for taxes, and if an extension is needed it only applies to filing not for payment of taxes owed. Collins

reminded members to check Taxpayer Assistance Centers (TACs) for Saturday openings for outreach opportunities. Collins spoke about the annual face-to-face meetings that will take place next month in Jacksonville, FL; Oklahoma City, OK; and San Antonio, TX.

The National Taxpayer Advocacy (NTA) has a monthly blog that members might want to sign up for. The recruitment period closed on March 29, 2024, resulting in 143 applicants. Interviews with qualified applicants will take place in the next few months. Please report any discrepancies on activity reports to your analysts so they can be resolved. Collins thanked the members for being a part of this program and is looking forward to a good year.

### **DFO Report**

Jeans referred to Brown for a discussion about travel. Brown explained the process for travel and advised what information would be collected for flight and hotel reservations. Once the travel has ended, members will send any receipts so that travel vouchers can be processed for refundable expenses to be reimbursed.

### **Approval of Minutes**

March 14, 2024, minutes. Edits made included Jason Crispin was marked as present, and Robert's name was updated from Bob to Rob. Miller motioned; Brinkley seconded.

**Action:** March minutes accepted as corrected.

### **Committee New & Updates**

Dickey mentioned nothing new to report at this time. Tabat informed the committee the first Joint Committee (JC) meeting will be on April 22, 2024, at 3:00pm ET.

### **Awaiting IRS Responses**

Tabat explained this section will be used for any IRS responses that need to be reported on. Once the IRS responses are received will be reported by Dickey in future meetings. Tabat reported no IRS responses received at this time, hoping to receive some by May.

### **Subcommittee 1**

Dickey reported:

- **55984**-Form 8938 Statement of Specified Foreign Financial Assets.

Working on improving instructions for taxpayers to complete the form.

- **60161**-Form 1040-NR Nonresident Alien

This project has just been started and the subcommittee will continue to review for recommendations.

## **Subcommittee 2**

Calloway reported:

- **55265**-Form 2210

There is a discrepancy in how the calculations are being done. This issue will be worked more during the face-to-face meeting.

- **55239**-Form 8962 & Premium Tax Credit

This issue needed more looking into to understand what the taxpayer was encountering with the form and its instructions. The issue will be worked more during the face-to-face meeting.

## **2024 TAP Annual Report (Committee Check List)**

Dickey explained as we complete the projects, the committee will complete blurbs summarizing the projects. Volunteers to complete the blurbs will be solicited throughout the year.

## **Screening Report**

Tabat advised in next month's meeting the plan is to have the members screen new issues. A screening of parking lot issues was completed in February, the results will be sent with the May pre-reads.

## **Outreach Report**

Miller reminded everyone to update their activity reports on the TAPSpace. The first Outreach committee meeting is scheduled on, April 18, 2024, at 2pm ET.

## **ICC Updates/Newsletter**

Williamson reported the first meeting will be on next Tuesday, April 16, 2024, at 4pm ET. Williamson will write the first newsletter report then ask for committee volunteers for the next one.

## **Action Items**

- March minutes approved to be posted.
- Sending pre-reads for Subcommittees and full meeting.

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

None

## **Closing**

Jeans thanked everyone for joining and is looking forward to the face-to-face meeting. Jeans suggested subscribing to IRS news releases and the NTA blog for more information regarding issues the committee might work on. Jeans closed the meeting at 3:00pm ET.

**The next monthly meeting  
May 7, 2024, at 2:00pm ET/1:00pm CT/ 12:00pm MT**

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