

**Special Projects  
Taxpayer Advocacy Panel (TAP)  
Monthly Meeting Minutes  
Wednesday, June 12, 2024**

**Designated Federal Officer (DFO)**

- Shawn Collins                      TAP Director

**Attendance**

- |                       |                      |                 |
|-----------------------|----------------------|-----------------|
| • Richard “Rick” Bell | Corpus Christi, TX   | Chair           |
| • Stacey Cloyd        | Washington, D.C.     | Member          |
| • Aissata Diaby       | Harrisburg, PA       | Member (Absent) |
| • Robert “Bob” Foley  | Natick, MA           | Member          |
| • Tiffany Grayson     | Beaufort, SC         | Member          |
| • Steven Hall         | Long Island, NY      | Vice-Chair      |
| • Steven Hoffman      | Westford, PA         | Member          |
| • Jihan Jude          | Orlando, FL          | Member          |
| • Rebecca Lammers     | International/London | Member          |
| • Jared Lefevre       | Billings, MT         | Member          |

**Staff**

- |                          |  |
|--------------------------|--|
| • Kevin Brown            | Management Assistant                           |
| • Shawn Collins          | Acting TAP Director                            |
| • Conchata Holloway      | TAP Program Analyst                            |
| • Kelvin Johnson         | TAP Program Analyst                            |
| • Robert Rosalia         | TAP Program Analyst                            |
| • Antoinette “Toni” Ross | TAP Program Analyst                            |
| • Robert Rosalia         | TAP Program Analyst                            |
| • Ann Tabat              | TAP Program Analyst                            |
| • Mejbeen Balsara        | Program Analyst Wages & Investments            |
| • Lisa Hunter            | Legal Admin. Specialist Systemic Advocacy (SA) |
| • John Manhire           | Legal Admin Specialist (SA)                    |

**Members of the Public**

None

**Welcome/Opening – Designated Federal Official (DFO)**

Jeans opened the meeting and welcomed all in attendance.

**Roll Call**

Quorum was made.

**Welcome Announcements/Comments/Acknowledgements**

Bell thanked everyone for hard work done this year.

### **National Office Report**

Shawn Collins thanked the committee for all of the work they are doing to take on this massive job and all the taxpayers they are helping along the way. Collins reported the planning of the Joint Committee (JC) face-to-face meeting for August 26-29, 2024, in Jacksonville, FL with more information to come.

The TAP quarterly meeting will be July 10, 2024, at 1pm ET, the details of this meeting are being planned now. Let Annie Gold or Kevin Brown if you have not received your travel reimbursement by now. The business cards should have received by now, let your analyst know if you have not received your cards yet.

The first tax forum will be held in Chicago, IL in July. Collins asked everyone to input their TAP activities on the activity reports please.

### **DFO Report**

Jeans reported the TAP Staff training meeting will be the week of July 8, 2024. The SP Full Committee will be held on July 10, 2024.

### **Approval of Minutes**

The May 10, 2024, meeting minutes were presented for approval. Cloyd motioned; Hoffman seconded.

**Action: Minutes approved as submitted.**

### **Chair Report Out**

- IRS Response to Issue 63760, IP PIN for Overseas Taxpayers Committee accepts response. Six adapted; six rejected; one on hold. Hall motioned; Hoffman seconded.

**Action: Issue response accepted**

- IRS Response to Issue 68951-Increase Transparency of the SOP Project Roll Out- Response: Resolved prior to elevation.

Hall Motioned; Hoffman seconded.

**Action: Issue response accepted**

### **Outreach Report:**

- Please continue to do Outreach

Hall spoke about a webinar Lammers shared with the members, with the IRS trying to expand the Direct File project to every single state. Hall thinks this is cool and shared the link to the newsletter in the chat. Hall suggested members use town fairs and outside events for outreach opportunities during the summer.

Hall recognized Lammers for organizing problem-solving days and met with Jacqueline Lane to discuss outreach opportunities with the Center for Taxpayer Rights. Cloyd discussed TAP at a Volunteer Income Tax Assistance (VITA)

volunteer appreciation day. The National Vice-Chair Michelle sent email about other committees needing to do more, but not this committee.

- TAP Newsletter (Newsletter due to Vice Chair on the twenty-third of the month-Tiffany Grayson)
- Update your Activity Record in [www.TAPSpace.org](http://www.TAPSpace.org)

#### **Subcommittee 1 Report out- Lammers**

- TAP Referral for Issue 71912-Prioritize Simple Tax Returns for International Taxpayers to Use Direct File by Filing Season 2025 (Referral was submitted to the Joint Committee (JC) and approved to go to the IRS)
- Draft TAP Referral for Issue 71913- Safe Harbor for International Taxpayers Who Received the Expanded Tax Child Credit Draft TAP

Jude motioned; Hall seconded.

**Action: Issue elevated to JC (Pending Quality Review (QR) from TAS)**

- Referral for Issue 65214-US Citizens Abroad with Retirement Income (Dropped by subcommittee)

#### **Subcommittee 2: Report Out Lammers**

1. Draft-Issue 66513-New Envelopes for Refund Checks (Going through Attorney Advisors (AA) and Systemic Advocacy (SA) review)
2. Draft TAP Referral for Issue 71914-Enable 2024 Tax Filing Season Access to Free File Fillable Forms for International Taxpayer

Issue worked and should be ready to go. Hall motioned; Lammers seconded.

**Action: Issues elevated to JC (Pending TAS QR)**

3. Issue 67239-Electronic Power of Attorneys for Overseas Taxpayers

This issue is still being worked, Lammers will respond to committee via email soon.

#### **Screening Report (Parking Lot)**

- Screened 32 issues
- Dropped 19 issues
- Six Project proposals were created
- Four Issues associated
- Three issues will be researched a little more by Ross

#### **Internal Communications Committee (ICC) Report**

- The ICC reviewed Project Proposal 68481-Allow Members of the Public to Join an E-Mail List for TAP Meetings.
- They discussed TAP Newsletter and Setting a Schedule for Member Submissions.
- They also discussed TAP Facebook Page to set a schedule for Submissions and Seek Volunteer Administrators.

### **Roundtable**

Grayson spoke of meeting with the South Carolina Local Taxpayer Advocate (LTA) and plans on meeting some congressional leaders. Hall inquired about submitted issue regarding keeping submitters informed about their issues if it develops into an issue. Jeans, staff will discuss this next month. Lammers inquired about TAP members being part of the interview process. Bell inquired about getting two international members. Jeans indicated the staff is working on this and has not been able to justify this change just yet. Collins indicated the JC will be included in this process next year. Lammers asked for status on Subject Matter Expert (SME) for VITA.

### **Action Items Summary**

- Send approved May meeting minutes to Kevin Brown.
- Set-Up another screening meeting for next month.
- Send issues 66513, 71913, and 71914 to JC for June agenda.
- Update SAMS

### **Chair or Vice Chair of SP Committee Closing Comment**

Hall, keep working on TAP's mission. Bell spoke about how good it feels to have some many issues going to the JC. Let's keep it going.

### **Closing**

Congratulated the committee on all the good work this year.  
Jeans closed the meeting at 11:49pm ET.

**Next Meeting: July 10, 2024, at 11:00am EST/12:00pm CST/1:00pm  
MST/2:00pm PST/7:00am AST/6:00am HST**

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