

**Tax Forms & Publications Committee, (TFP)  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Thursday, June 13, 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          |

**Staff**

- |                   |  |
|-------------------|--|
| • Kevin Brown     | TAP Management Assistant                                       |
| • Shawn Collins   | 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)                       |
| • Nicole Foy      | Treasury Inspector General for Taxpayer Administration (TIGTA) |

**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 thanked the members for all the work they do as volunteers. Collins reminded the committee to include all TAP time on activity reports. Please reach out to Annie Gold or Kevin Brown if you have not received your travel reimbursement yet.

Collins reported on the status of planning the Joint Committee (JC) face-to-face meeting scheduled for August 26-29, 2024. Location will be in Jacksonville, FL, more information to come soon. The first tax forum will be held in Chicago, IL in July.

The business cards have been shipped and should have received by now. Let your analyst know if you have not received your cards yet. The TAP quarterly meeting will be held on July 10, 2024, at 1:00pm ET, the details of this meeting are currently being planned.

### **DFO Report**

Jeans asked to speak to your analyst or Kevin Brown if you would like to have an additional copy of the 2023 TAP Annual Report. Jeans reported the TAP Staff training meeting will be the week of July 8, 2024. The next committee meeting will be on July 16, 2024, will be held on that day for this month only. Jeans thanked those who completed the survey after the face-to-face meetings.

### **Committee New & Updates**

Dickey reported Jason Crispin will be attending the JC face-to-face meeting in August for the committee. Jeans Miller will attend the Tax Forum in Baltimore, MD this year.

Crispin attended a focus group with GAO on May 21, 2024, regarding ID.me. Crispin reported that the Internal Communications Committee, in 2022, submitted a referral with seven recommendations on this topic, but very little if any were accepted. Crispin shared a write-up of this meeting with Tabat. Crispin learned a lot in the meeting and is interesting to hear feedback from other TAP members concerning this issue. Crispin encouraged members to join future focus group meetings.

### **Approval of Minutes**

May 7, 2024, minutes. Jason Brinkley motioned; Jason Crispin seconded.

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

### **IRS Responses Received:**

**64919** – Decedent Issues. Response was received, asked the members to review and determine if IRS responses are accepted or rebuttal will be completed. Dickey determined be tabled until the next committee meeting.

**52596** - F1040 – **Rebuttal**- anticipating a response soon.

**57139** – Digital Assets/Crypto- Response will be reviewed by committee next month.

### **Subcommittee 1**

Dickey reported:

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

There are a number of recommendations being considered and this issue is still being worked.

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

Subcommittee is still working on.

### **Subcommittee 2**

Calloway reported:

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

We reviewed half of recommendations, and this issue is still being worked.

- **55265**-Form 2210

Subcommittee is still working on.

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

Dickey thanked all who have helped so far with the pending write-ups.

### **Screening Report**

Tabat reported the screening meeting will be June 18, 2024, at 1pm ET. An update on results will be reported during next month's meeting.

### **Outreach Report**

Activity Report -[www.TAPSpace.org](http://www.TAPSpace.org). Miller reported May meeting was cancelled. Please complete your outreach and complete your outreach reports. Outreach can be community work regarding what we do for the IRS in large or small crowds.

### **ICC Updates/Newsletter**

Williamson reported ICC is working on Issue 68481 which recommended establishing a list of members of the public who want to attend our meetings. The referral will be voted on during the next meeting if completed. We also need administrators for the TAP Facebook page. Reach out to Williamson and Tabat if you are interested. Williamson and Miller will write the subcommittee articles for the newsletter. Dickey thanked them both.

### **Action Items**

- May minutes approved to be posted.
- Sending pre-reads for July subcommittees and full meeting.

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



Dickey requested IRS responses formatted for easy printing capabilities. Tabat will correct errors on these responses and format it for printing.

**Closing**

Jeans thanked everyone for joining and reminded everyone of the meeting date for July.

**The next monthly meeting  
July 16, 2024, at 3:00pm ET/2:00pm CT/ 1:00pm MT/12:00pm PT**

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