

**Special Projects  
Taxpayer Advocacy Panel (TAP)  
Monthly Meeting Minutes  
Wednesday, July 10, 2024**

**Designated Federal Officer (DFO)**

- Cedric Jeans TAP East Chief

**Attendance**

- |                       |                      |                 |
|-----------------------|----------------------|-----------------|
| • Richard “Rick” Bell | Corpus Christi, TX   | Chair           |
| • Stacey Cloyd        | Washington, D.C.     | Member          |
| • Aissata Diaby       | Harrisburg, PA       | Member          |
| • Robert “Bob” Foley  | Natick, MA           | Member          |
| • Tiffany Grayson     | Beaufort, SC         | Member (Absent) |
| • 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 (Absent) |

**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 joining the call.

### **National Office/DFO Report**

Jeans reminded the committee that the tax forums started this week and indicated we have TAP members representing TAP this year. Jeans suggested members attend if there is one in their area as it is a good opportunity to pick up issues. The TAP staff training was moved from this week to the second week in August, so TAP staff is available all of this week.

The IRS has numerous initiatives going on so Jeans suggested members to sign up for news feeds so that TAP can be aware of them and how they might affect our work. Jeans said we are having the Joint Committee (JC) face-to-face meeting at the end of August. Please share any ideas you have for 2025 so your Chair can present them during this meeting.

Form 14388 the TAP submission form was revised this year. This provides a way for taxpayers to submit issues to us either on paper or online. One line-item change allows submitters to choose the committee that best fits the issue there are sending to us. Please review it to see the new changes. The form can be completed online and sent directly to our inventory faster.

### **Approval of Minutes**

The June 12, 2024, meeting minutes were presented for approval. Cloyd motioned; Foley seconded.

**Action:** Minutes approved as submitted.

### **Chair Report**

Bell reported:

- Issue 66513-New Envelopes for Refund Checks

The issue was submitted and approved by the JC to be sent to the IRS.

- Issue 71914 will be sent to the JC after responding to the Attorney Advisors (AA) with some issues to be fixed.
- Direct File Issues

Bell said we will keep our eyes open since this committee will assume all duties related to Direct File issues.

### **Outreach Report**

Hall Reported:

- Please continue to do Outreach. Use outside activities to conduct outreach for in-person events.
- TAP Newsletter (Newsletter due to Vice Chair on the twenty-third of the month- (Aissata Diaby for July)
- Update your Activity Record in [www.TAPSpace.org](http://www.TAPSpace.org)

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

- Draft TAP Referral for Issue 71914-Enable 2024 Tax Filing Season Access to Free File Fillable Forms for International Taxpayer

Approved by the Full Committee on June 12, 2024, and going through AA and SA review.

- New Project Proposals:
  - Issue 58885-Applying Payments for Married Filing Jointly Returns. **(Dropped)**
  - Issue 63737-Data on Wage and Income Transcripts. Cloyd leading.
  - Issue 71593-Foreign Direct Bank Deposit. Lammers leading.
  - Issue 75256-ID.me Should be Replaced by Login.gov. Jude leading

### **Subcommittee 2: Report Bell**

Bell indicated that after a Subject Matter Expert (SME) report, Volunteer Income Tax Assistance (VITA) will not be helpful for international taxpayers.

- Draft TAP Referral for Issue 71914-Enable 2024 Tax Filing Season Access to Free File Fillable Forms for International Taxpayer. Approved by the Full Committee on June 12, 2024. (Going through AA and SA review)
- Issue 67239-Electronic Power of Attorneys for Overseas Taxpayers Issue still being worked.

Project Proposals:

- Issue 64976-Data from Form 1099 INT, etc.

Hall suggested this issue be dropped. Lammers would like to complete a rebuttal for this response.

- Issue 74358-Credit Transfer Tool

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

- Parking Lot Screened: 28 issues screened; 6 referred to other committees; 8 dropped; 3 project proposals
- New Issues Screened: 58 Issues screened; 38 dropped; 14 associated with Issue 71914; 2 associated with other issues; 5 referred to other committees; and 3 went to the Parking Lot.

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

- Next meeting is on July 18, 2024.
- The ICC reviewed Project Proposal 68481-Allowing Members of the Public to Join an E-Mail List for TAP Meetings. More research is being done on this referral.
- The TAP newsletter was discussed along with a schedule for member submissions.
- They also discussed TAP Facebook Page to set a schedule for Submissions and Seek Volunteer Administrators.

### **Roundtable**

Lammers did outreach at local Americans in a London fourth of July event. TAP was shared with overseas taxpayers. Lammers spoke of a regulation change allowing taxpayers to pay their taxes by debit or credit card. This revision is a

good thing and might be a future TAP issue. Steven Hall can take the lead if the committee agrees, and Jude will assist.

### **Action Items Summary**

- Send approved June meeting minutes to Kevin Brown.
- Sending Issue 719140 and 71983 to JC.

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

Hall expressed gratitude for members taking time to participate on this committee. Bell spoke of four issues going to the JC which is a great accomplishment for this committee.

### **Closing**

Jeans spoke of National Taxpayer Advocate (NTA) June Objectives report with something tied to this committee. Processing time for Stolen ID cases and Improving administration of information international return penalties by eliminating systemic assessments. Jeans suggested reviewing this report, which may be able to be used to support some of our recommendations. Jeans recognized Lammers for outreach events and traffic on the website. Jeans asked for members to share pictures and notes for outreach events for the website.

Jeans closed the meeting at 11:35pm ET.

**Next Meeting: August 14, 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.**