

**Joint Committee (JC)  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
April 22, 2024**

**Designated Federal Official (DFO)**

- Shawn Collins Acting TAP Director

**Members Present**

- Richard “Rick” Bell Chair, Special Projects Committee
- Michelle Brookens National TAP Vice-Chair
- Ellen Dickey Chair, Tax Forms and Publications Committee
- Debra “Debbie” Kurita National TAP Chair
- Angela Madison Chair, Internal Communications Committee (ICC)
- Steven Sklar Chair, Notices and Correspondence Committee
- Richard “Rick” Rodriguez Chair, Taxpayer Assistance Center Committee (TAC)
- Jantel VanOrden Chair, Toll-Free Phone Lines Committee
- Jim Wiseman Chair, Taxpayer Communications Committee

**Staff**

- Kevin Brown TAP Management Assistant
- Conchata Holloway TAP Program Analyst
- Cedric Jeans TAP East Chief
- Susan Jimerson TAP West Chief
- Kelvin Johnson TAP Program Analyst
- Matthew O’Sullivan TAP Program Analyst
- Robert Rosalia TAP Program Analyst
- Antoinette “Toni” Ross TAP Program Analyst
- Ann Tabat TAP Program Analyst

**Members of The Public**

None

**Welcome**

Collins welcomed everyone and opened the call at 3:00 pm ET. Collins thanked all the chairs and leadership and is looking forward to a good year.

**Roll Call**

Quorum was met for the meeting.

**Review Agenda**

Kurita reviewed the agenda

### **National Office Update/Bylaws Update**

Collins reminded everyone that travel for the face-to-face meetings will be done by Kevin Brown and Annie Gold. The Bylaws update is still being worked and plan to be presented at the next All-TAP meeting some time in July or August of this year.

### **TAP East Update**

Jeans reported:

- Business cards are being ordered for new members.
- Let your analyst know if you need new cards.
- We are adding a Quick Response (QR) code to the new business cards with a direct link to [www.improveirs.org](http://www.improveirs.org) for all cards.
- We hope to get them before or shortly afterward the face-to-face meetings.
- Tax Forums coming up and the first invite is extended to the Vice-chairs; the National Chair/National Vice-Chair.

### **TAP West Update**

Susan reported:

- Staff changes- Jose Cintron introduced as lead for the Taxpayer Communications Committee.
- Kelvin Johnson is backing the Communications committee, database, and electronic stuff.
- Angela Madison was elected Chair at the first ICC meeting
- Reach out to Gold for travel questions.

### **Approval of November 27, 2023, JC Meeting Minutes**

Approval of November 27, 2023, JC Meeting Minutes. Brookens motioned; Rodriguez seconded.

**Action:** Minutes approved as submitted.

### **TAP Chair Report/Schedule Recurring JC Meetings**

Kurita is looking forward to the face-to-face meeting and appreciates the attendees for leadership training last week. The recurring meetings will be as follows:

Fourth Thursday of the month with the exception of November 2024.

### **TAP Vice-Chair/Outreach Report**

Brookens reiterated having the Vice-Chairs attend the Tax Forums. Brookens will work with them to accomplish this.

### **Public Comments**

None

### **Project Committee Review/Activities**

#### **Notices and Correspondence**

Steven Sklar reported

Issue 68460 CP22 Data Processing Adjustment Notice - Balance Due

All these referrals seek to make it easier for taxpayers to understand these forms. This is for everyday people to understand. Sklar motioned; Wiseman seconded.

**Action: Issue elevated to the IRS for consideration as edited.**

Issue 68069 CP 25 Estimated Tax Credits Discrepancy - We Changed Your Return to Match Your Credits or Payments Posted to Your Account - Even Balance

This referral seeks to make it easier for taxpayers to understand this form and for everyday people to understand. Sklar motioned; Brookens seconded.

**Action: Issue elevated to the IRS for consideration as edited.**

Issue 68463 CP 504 will be tabled until next month.

There is more to come as we await IRS responses on about three or four referrals. Sklar expects three issues for next month and possibly some rebuttals from older referrals.

### **Tax Forms and Publications**

Ellen Dickey reported will discuss issues from IRS at the face-to-face meeting. There are five more to review. Bell said we are working on four issues and may have two ready for next month. One is reducing postal check theft; three are international issues concerning Powers of Attorney (POA). We screened 120 issues 20 Parking Lot and 24 sent to other committees.

### **Special Projects**

Richard Bell reported seven referrals awaiting responses from the IRS. Subcommittee 1 is working on Form 8938 Statement of Specified Foreign Assets, and Form 1040 NR Nonresident Aliens. Subcommittee 2 is working on Form 2210 Underpayment of Estimated Tax by Individuals, Estates and Trust; Form 8962 Premium Tax Credit. We hope to have them ready after the face-to-face meeting.

### **Taxpayer Assistance Center Improvements**

Rodriguez reported they are still getting familiar with issues, house keeping process. They are working on recommendations responded by IRS as "Resolved Prior to Elevation". The IRS explained infrastructure reduction act resolved this issue. This will be tabled for possible rebuttal. Rodriguez suggested reviewing all responses from IRS to avoid such issues.

The committee is doing the annual review of Volunteer Income Tax Assistance (VITA) paperwork, forms and training. Rodriguez invited any other members to assist with this process. The forms to be reviewed are: 4012; 66744; 4491. There will be a screening committee meeting next week. This year's focus is the appointment system and services being provided. Holloway following up with response from IRS for the committee about an implementation date and to push them to review that referral again.

### **Taxpayer Communications**

Wiseman reported subcommittee 1 is working on four issues. Subcommittee 2 is working on four 4 issues. Some of the issues pertain to website access and overall communications.

The screening committee closed nine and transferred one. Wiseman expects more issues after the face-to-face meeting.

### **Toll Free Lines**

Jantel VanOrden reported working housekeeping issues and learning the process. The committee received three issues, Wages & Investment (W&I): Voicebot tech regarding the toll-free line; Chatbot tech regarding 1040; and artificial tech. The committee decided to review the National Taxpayer Advocate (NTA) report to Congress that highlighted as number four the telephone and in-person service. There are tons of opportunities within this report for us to work.

### **Outreach**

Brookens defined what is outreach; suggested members reach out to their Local Taxpayer Advocates (LTAs) for outreach opportunities; get marketing materials from [www.tapspace.org](http://www.tapspace.org) for outreach; get familiar with our Annual Report; and to like, follow and share the Facebook page. They set up the recurring meetings as the third Thursday of each month.

### **Internal Communications Committee**

Cintron reported

Madison was elected Chair and Dan Halleman elected Vice-Chair.

Set meeting for third Thursday 3pm ET.

Issue 68481 proposal being made.

Issue 61969 monitoring response for Issue 61939

Jimerson added, they are working on first newsletter, reports are due on the twenty-fifth day of each month. Kurita asked that they use the template provided. They are also looking for additional Facebook administrators.

### **Action Items:**

- Post minutes from November 27, 2023.
- Recurring meeting sent on the fourth Thursday at 3pm ET.
- Approved issues 48460, 68069 from Notices.
- Issue 68463 CP 504 will be tabled until next month.

### **Roundtable**

Wiseman asked about face-to-face in Oklahoma City. Inquired about meetings on [www.tapspace.org](http://www.tapspace.org). Collins said the agenda will be posted later this week.

### **Closing**

Collins thanked everyone for joining and for all the work you continue to do. Looking forward to San Antonio members closed the call at 3:47pm.

**Next Joint Committee Meeting: May 23, 2024, at 3:00pm ET**

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