

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
May 23, 2024**

Designated Federal Official (DFO)

- Shawn Collins TAP Director

Members Present

- Richard “Rick” Bell Chair, Special Projects Committee
- Michelle Brookens National TAP Vice-Chair (Absent)
- Ellen Dickey Chair, Tax Forms and Publications Committee
- Debra “Debbie” Kurita National TAP Chair
- Angela Madison 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 (Absent)
- Jim Wiseman Chair, Taxpayer Communications Committee
- Rebecca Lammers Visitor, Special Projects Committee

Staff

- Kevin Brown TAP Management Assistant
- Gulden Durdu TAP Program Analyst
- Conchata Holloway TAP Program Analyst
- Cedric Jeans TAP East Chief
- Susan Jimerson TAP West Chief
- Kelvin Johnson TAP Program Analyst
- Priscilla Medrano TAP Program Analyst
- Matthew O’Sullivan TAP Program Analyst
- Robert Rosalia TAP Program Analyst
- Antoinette “Toni” Ross TAP Program Analyst
- Fred Smith 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.

National Office Update/Bylaws Update

Collins thanked the members who participated in the General Accounting Office forum as it went over very well. Collins is glad that other units are calling on TAP for assistance in matters like this. Please encourage all members to input their outreach in the activity reports to show all of their TAP hours. Collins indicated that the face-to-face meetings went well in all three locations and hopes all members will complete the survey for these meetings. Collins reported the JC face-to-face meeting is being planned for the week of August 26, 2024, and locations are being researched now. Members are welcome to provide input.

Review Agenda

Kurita reviewed the agenda.

TAP West Update

Susan reported the meetings were wonderful and it was great to meet up in person. The committees started working on referrals and had a great experience. There was an ICC meeting earlier today which was productive. Susan reported the staff is working to get any information promised during the meetings out and Annie Gold is working to process travel vouchers.

TAP East Update

Jeans reported all topics covered at this time.

Approval of April 22, 2024, JC Meeting Minutes

Approval of April 22, 2024, JC Meeting Minutes. Rodriguez motioned; Bell seconded.

Action: Minutes approved as submitted.

TAP Chair Report/Vice-Chair/Outreach Report

Kurita thanked those who attended the face-to-face meeting. She hopes it was very productive and encouraged the members to complete the survey and the activity reports. Kurita reported speaking at a congressional seminar outreach event with the Local Taxpayer Advocate (LTA), Angela Madison and Philip Hwang.

Public Comments

None

Project Committee Review/Activities

Notices and Correspondence

Steven Sklar presented Issue 68463 CP 504 Notice of Intent to Levy. There were a number of comments and recommendations received and were accepted. This referral seeks to make it easier for everyday taxpayers to understand these forms, Sklar explained. Sklar motioned; Wiseman seconded.

Action: Issue elevated to the IRS for consideration.

Sklar reported having a terrific meeting in San Antonio and is hoping to do it again next year. The committee is working on 6 or 7 issues in subcommittees for the coming month.

There are a couple of rebuttals being worked. Sklar was surprised that the word “please” could not be used on a few forms. Madison agreed with not using please to convey that action is required and not optional. Madison agreed some areas can use softer language, but not everywhere.

Special Projects

Richard Bell presented Issue 71912 Prioritize simple returns for international taxpayers to use Direct File for Filing Season 2025. Bell indicated that the face-to-face meeting was very productive, and the committee might have two more referrals that are on deck.

This referral seeks to positively impact international taxpayers to allow them to be able to have some assistance with completing their taxes in the cheapest and easiest way possible. The Direct File option would help to accomplish this goal and help a lot of international taxpayers. Wiseman inquired about the income requirements for this program and Lammers responded that a majority of international taxpayers fall under the income threshold for this program.

Dickey suggested requesting Free File be available to international taxpayers as well. Bell indicated this is being worked as a separate referral. Bell motioned; Dickey seconded.

Action: Issue elevated to the IRS for consideration.

Bell reported there are two responses from the IRS being reviewed now. Bell thanked Lammers for joining the call and helping for the committee.

Tax Forms and Publications

Ellen Dickey reported having a great face-to-face meeting. The Subcommittee 1 is working on Form 8938 *Statement of Specified Foreign Assets*, and it is close to being done. They are also working on Form 1040 *Nonresident Alien*, which is still being worked.

Subcommittee 2 is working on Form 2210 *The Understatement of Estimated Tax and Related Penalties*, and Form 8962 *Premium Tax Credit*. The committee discussed one response from the IRS and are awaiting responses on about six other issues.

Taxpayer Assistance Center Improvements

Rodriguez reported worked to get new issues to work on some screening plans also. One issue being worked is taxpayers being able to provide online feedback to good service received. They are also working on language regarding service to underserved populations by the Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE). This is specifically for taxpayers that are right at, below or just above the income requirements for these programs.

One member is participating in four weeklong virtual meetings about the Form 6744. Other members are participating in day long reviews for Publications 4491 and 1012. Rodriguez reported members doing at reach at dinners and at venues with tax preparers. Rodriguez reminded his committee to complete the survey for the face-to-face meeting.

Taxpayer Communications

Wiseman reported all but one member in attendance at the face-to-face meeting. They split into subcommittees and got a couple referrals into draft form, and we are hoping to get them completed next month. The committee received a response to Issue 48868, but it is yet to be reviewed. Wiseman reported overall it was a great meeting with lots of progress made.

Toll Free Lines

Kurita reported a good meeting. Both subcommittee chairs are new members, and they learned a lot at this meeting. The committee received two issues back from IRS. Issue 69432 about live chat had seven recommendations with six under consideration and one not adopted. This may be rebutted if the subcommittee determines it needs to be. Issue 61907 The Dashboard Data for Where's My Refund had six recommendations, all under consideration.

There is a new issue, perhaps about social media, assigned to a subcommittee. The committee expects to have a chance to review Voicebox and Chat Bots as part of work plan this year.

Outreach

Kurita encouraged everyone to do your outreach and complete your activity reports.

Internal Communications Committee

Madison reported having a wonderful ICC meeting today. The primary thing on their radar/agenda is to continue to work on Facebook and to engage with taxpayers to increase the awareness on what is happening in the TAP and working on referrals related to these goals.

Madison said the committee is soliciting any member who is interested in being a Facebook administrator. Please contact Lammers, Madison, Cintron, and TAP email address. Members can create post and learn more about this page also. Madison requested all members to share their "why" as a 30 second video or written statement about why you joined TAP; how you found out about it; what you are excited about; or something you accomplished in TAP. These should be shared with your ICC member.

Action Items:

- Post minutes from April 22, 2024.
- Approved Issue 68463, from Notices and Correspondence Committee.
- Approved Issue 71912 Special Projects Committee

Roundtable

O'Sullivan reminded members to submit the newsletter articles. Bell recommended getting two international representatives. Bell thought the meetings in the same location was invaluable and encouraged doing that again next year. Kurita said include this in survey. Collins indicated the dates are solid for the JC meeting, but the locations are still being



worked on and hope we know this by early June so this message can be conveyed to the committee.

Closing

Collins thanked everyone for joining and for all the work you continue to do. Closed the call at 3:52pm.

Next Joint Committee Meeting: June 27, 2024, at 3:00pm ET

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