

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
August 22, 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
- Jim Wiseman Chair, Taxpayer Communications Committee
- Jason Crispin Visitor, Tax Forms and Publications Committee
- Michael Stewart Visitor, Notices and Correspondence 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
- 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
- Ann Tabat TAP Program Analyst
- Mejbeen Balsara Program Analyst Taxpayer Services (TS)

Members of The Public

None

Welcome

Collins welcomed everyone and opened the call at 3:00 pm ET.

Roll Call

Quorum was met for the meeting.

Review Agenda

Kurita reviewed the agenda.

National Office Update/Bylaws Update

Collins mentioned we are looking forward to the planning session for next week. The agenda, invites and bylaw updates have already been sent to the committee. The tax forums are in progress at Dallas, TX this week with Holloway, Kim Stewart, Priscilla Medrano, and Jim Simpson being present with pictures being taken. Collins praised Simpson on being very well prepared for this event. The next tax forum will have Debra Kurita and Philip Hwang in San Diego, CA.

TAP West Update

Jimerson reminded everyone we are soon heading into the Annual Report season, this will be discussed next week. TAP received an invite from Stakeholder Partnerships, Education and Communication (SPEC) to join them in an outreach webcast on the topic of scams, schemes, and preventions of those on September 26, 2024, at 2pm ET. This will educate us on what we can do for our elderly and limited English individuals. The invite will go out in the next couple days.

TAP East Update

Jeans mentioned planning for 2025 next week and gave food for thought. Please talk to your members to get proposals or topics of interest for the next TAP year and bring those to the planning session. This will add to what we talk about next week.

Approval of June JC Meeting Minutes

Approval of July 25, 2024, JC Meeting Minutes. Bell motioned; Wiseman/Dickey seconded.

Action: Minutes approved as corrected.

TAP Chair Report

Kurita encouraged committees to move referrals along to get them done before the end of the year. She asked the members to log in their hours on the activity reports and to remind your members to do so. Kurita had an outreach with Joseph Parampathu at the Buena Park Ehlers Senior center and indicated the SPEC information would have been great for that event. Kurita is looking forward to tax forum in San Diego, CA. Kurita emphasized the importance of outreach in Brookens' absence.

Vice-Chair/Outreach Report

N/A

Public Comments

None

Project Committee Review/Activities

Special Projects

Richard Bell presented Issue 75256- Allow International Taxpayers to Set-up and Access their Online IRS Account through Login.gov.

This referral is recommending www.login.gov as an option to login. Wiseman asked for clarity on this issue. US phone numbers or addresses is the biggest barrier to www.id.me for international taxpayers for easier access. Bell motioned; Rodriguez seconded.

Action: Elevated to IRS for consideration by unanimous consent.

Issue 63737- Data on Wage and Income Transcripts

This issue is asking the IRS include full Employer Identification Number (EIN) and state tax information, so taxpayer has more access to their information on their transcript. Wiseman noted they are working a similar issue that might allow for a collaboration of both committee issues. Bell motioned; Dickey seconded.

Action: Elevated to IRS for consideration by unanimous consent.

Issue 67239- Electronic Power of Attorneys for Overseas Taxpayers

This issue seeks to allow for an easier way to process Power of Attorneys (POA) to reduce the cost and time burden for international taxpayers. One recommendation seeks to allow qualified non-US practitioners to work on these and an electronic option for a POA to be processed. Kurita suggested adding the possible barriers to the referral. Bell motioned; Wiseman seconded.

Action: Elevated to IRS for consideration by unanimous consent.

Taxpayer Assistance Center Improvements

Rodriguez presented Issue 69548- Customer Feedback for Level of Service Provided to Taxpayer. This issue seeks an easier way to send an acknowledgment or compliment for an employee. One recommendation on the www.IRS.gov main page is to add a link that specifically allows taxpayers the contact information and space to add information to be passed on about employees. This is a better means for taxpayer feedback. This is for the right to speak with a supervisor for adequate or inadequate support from customer service. Kurita suggested a small word change to allow the referral to be understood better. Rodriguez motioned; Sklar seconded.

Action: Elevated to IRS for consideration by unanimous consent.

Rodriguez reported the committee working on issues 55988; 66217; and 66143 are being finalized. Issues 66145, and one more being worked on. Outreach was hampered with illnesses and work commitments throughout the summer.

Tax Forms and Publications

Dickey reported Issue 55984 Form 8938 Statement of Specified Foreign Financial Assets

This issue seeks to clarify the instructions when and how assets should be valued and how the information is transferred to the form. Attorney Advisor (AA) and Systemic Advocacy (SA) had an issue regarding an additional agency involved with this process, but the committee decided to go ahead and submit that part with this referral anyway. Wiseman and Kurita complimented the committee on doing a lot of great work. Dickey motioned; Sklar seconded.

Action: Elevated to IRS for consideration by unanimous consent.

The committee screened 60 issues and have many more issues in the Parking Lot.

Subcommittee 1 is working an issue on Form 1040NR, and Form W-4. Subcommittee 2 on Form 2210 and Form 8962 have been reviewed by AA and SA so they will be considering these

responses soon. They are also working on a rebuttal on Issue 64919 regarding filings for overseas taxpayers. They just received projects on form 1098 and Form 8936. These new issues are being worked now.

The committee just received a response from an issue last year regarding Form 8615 Unearned Income for Minor Children, and an issue on Form 8915 Qualified Disaster Retirement Plan distributions and Repayments. We sent them some attachments the IRS did not receive on this issue for further consideration. Issue 57139 was sent back for clarification. An issue for Forms 3520 and 3520a were also sent back for clarification. Dickey stated that we have not received response for an Issue regarding Form 8888 Allocation of Refund (Including Savings Bond Purchases). Jason Crispin will be attending the JC planning meeting next week for the committee. Dickey also noted that Miller attended the Baltimore tax forum.

Toll-Free

VanOrden reported the committee finished one issue from last month. They were able to clear the backlog of issues from the screening committee and are up to date now.

Issue 62577- Toll Free Phone Lines – Standardized Customer Service Survey.

This issue seeks more information since the Customer Service Representative (CSR) picks who takes the survey and have little information about this. This does not allow the surveys to reflect the actual service levels. This issue seeks to allow all or some statistical number of customers to participate in the survey. This issue seeks to get a clear indication about how taxpayers are picked and whether more people get to voice their concerns. The system should be designed to ask taxpayers to participate in a way that is not dependent on the CSR's choice. This will allow the IRS to know if the customer service is really giving high quality service.

VanOrden said the survey should actually gage customer satisfaction. From the Taxpayer Bill of Rights (TBOR), The Right to Quality Service; The Right to be Informed; and the Right to a Fair and Just Tax System are the goals of this issue. Rodriguez complimented this referral and how it is structured. VanOrden motioned; Rodriguez seconded.

Action: Elevated to IRS for consideration by unanimous consent.

Notices and Correspondence

Steven Sklar reported approving some issues yesterday but should have five or six issue for the next JC meeting. We are awaiting eight responses from the IRS also. Sklar requested a status on those issues. Mitchell Gerstein will represent the committee at next week's planning meeting. Sklar indicated they will reach out to Dickey regarding Publication 3. Rosalia indicated that three responses were just received from the IRS for the committee to review.

Taxpayer Communications

Wiseman reported working on three issues now. August was a very compressed week with all of the committee's meetings in the same week. The committee screened 53 issues, closed 44, transferred three; and put six in the Parking Lot.

Internal Communications Committee

O'Sullivan reported working on an issue for an email list for members of the public to sit in on TAP meetings. One member is trying to use assets IRS currently has available to set up a link on IRS.gov to www.improveirs.org to make it visible and prominent to be accessed quickly by the public. It's close to end of the month so submit the newsletter articles soon, so it can be published on time. Facebook administrators are needed before the end of the year to have a continuity plan in place. Members were encouraged to reach out to Madison, Brookens or O'Sullivan for access to the Facebook page if they would like to post an item.

Outreach

N/A

Action Items:

- Post minutes from July 25, 2024.
- Chairs should share questions or proposals for next week's meeting to Holloway.
- Approved Issues 75256, 63737 and 67239 from Special Projects.
- Approved Issue 69548 from TAC.
- Approved Issue 55984 from Forms and Pubs.
- Approved Issue 62577 from Toll-Free.

Roundtable

Wiseman asked about the start of the meeting next week. Collins indicated the meeting will start at 8:15am ET on Tuesday, August 27, 2024.

Closing

Collins is looking forward to seeing everyone next week. Collins closed the call at 4:01pm ET.

Next Joint Committee Meeting: August 29, 2024, at 3:00pm ET

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