

**Special Projects
Taxpayer Advocacy Panel (TAP)
Face to Face Meeting Minutes
Friday May 10, 2024**

Designated Federal Officer (DFO)

- Cedric Jeans TAP East Chief

Attendance

- | | | |
|-----------------------|----------------------|-------------------|
| • Richard “Rick” Bell | Corpus Christi, TX | Member Chair |
| • Stacey Cloyd | Washington, D.C. | Member |
| • Aissata Diaby | Harrisburg, PA | Member |
| • Robert “Bob” Foley | Natick, MA | Member |
| • Tiffany Grayson | Beaufort, SC | Member |
| • Steven Hall | Long Island, NY | Member Vice-Chair |
| • Steven Hoffman | Westford, PA | Member |
| • Jihan Jude | Orlando, FL | Member |
| • Rebecca Lammers | International/London | Member |
| • Jared Lefevre | Billings, MT | Member (Absent) |

Staff

- Antoinette “Toni” Ross TAP Program Analyst
- Gulden Durdu TAP Program Analyst

Members of the Public

None

Welcome Announcements/Comments/Acknowledgements

Cedric Jeans opened the call and welcomed everyone to the meeting. Richard Bell then welcomed all members and said the committee had a very productive meeting. Jeans encouraged all members to read the IRA Strategic Operating Plan to find about IRS improvement initiatives.

Roll Call

Ross completed the roll call. Quorum was met.

Comments From the Public

N/A

TAP Success Stories

- Longer extension of time to file taxes.
- Improvement recommendations to numerous tax forms and publications.

- Separate lessons for Affordable Care Act in Pubs 4012 & 4491, related to Volunteer Income Tax Assistance (VITA) and Taxpayer Counseling for the Elderly (TCE) Training.
- IRS Inform taxpayers currently in active Earned Income Tax Credit (EITC) audits of hours of availability and “live examiner” options.
- Recommended the callback feature to the toll-free lines.

Approval of Minutes

April 12, 2024, minutes up for approval. Hall motioned; Hoffman seconded.

Action: Minutes approved as submitted

Outreach

- Hall reiterated the importance of outreach activities and timely updating the activity records. He also talked about his outreach activities.
- Cloyd writing the newsletter this month.
- Lammers presented to a group of about 25 people in Paris. Communicating with LTA for Hawaii and Puerto Rico and facilitating problem solving days for international taxpayers.
- Cloyd did an outreach to the director of University of Michigan for possible VITA services
- TAP Newsletter (Monthly Newsletter Articles assigned to members:
 - May (Stacy Cloyd)
 - June (Tiffany Grayson)
 - July (Aissata Diaby)
 - August (Bob Foley)
 - September (Jihan Jude)
 - October (Jihan Jude)
 - November (Steven Hoffman)
- (Newsletter due to Vice Chair on the 23rd of the month))
- Update your **Activity Record on TAPSpace**

Updates

Subcommittee -1 report out (Lammers):

Issue 65214 reviewed and decided to drop. Issue 71913 – further research will be done to ensure that the referral is done correctly before submitting to the IRS. Issue 68581 – will schedule a follow up meeting with a SME for clarification and prepare a new referral. Issue 48551- from year 2021 and still waiting for a response from the IRS. Issue 71912- changing the title of the project to “for filing season 2025” instead of “by 2025”. Additional edits made to the recommendations. Lammers motioned to send the project to JC, Bell seconded. Motion accepted.

Subcommittee -2 report out (Bell):

Issue 66513 recommendations presented. Hall motioned to send the project to JC pending AA and SA approval, Hoffman seconded. Motion accepted. Issue

71914 recommendations presented. Issue 67239 in works. Issue 41535 – committee will further review IRS’s response. Issue 44253- IRS response of non-adapt was accepted.

ICC Report Out (Jihan Jude)

- ICC updates were provided by Jude. 1st ICC meeting was held on April 16th. Monthly meeting will be the 3rd Thursday of the month @ 3pm. Any TAP member is welcomed to attend. Facebook admins needed to post content. Facebook administrators are needed for posting news, events, and information if you are interested reach out to you or Ann, any member of TAP can participate.
- 2024 ICC will be working on a project regarding a public email list to distribute a listing of the 6-project committee’s monthly full committee meetings dates and times for any members of the public that subscribe.
- 2023 Project to add the Speak Up brochure (PUB 3753) and information to VITA/TCE locations order form was successful.
- SPEC agreed to add the link to Speak Up Brochure (PUB 3753) to their publication 5683 for 2025 filing season. Publication 5683 is the VITA/TCE Handbook for Partners and Site Coordinators. Other IRS forms and publications are currently listed within the Publication. The Speak Up Brochure link will be added by the 2025 filing season.
- VITA/TCE training site materials & publication 5358- SPEC agreed to add the link to Speak Up Brochure (PUB 3753) to their publication 5358 for 2025 filing season. The publication 5358 is a Fact Sheet: VITA/TCE Training and site materials for SPEC partners and Employees. The Fact Sheet provides information regarding volunteer training and site materials for the filing season.
- Another recommendation under consideration to add Speak Up brochure to Form 2333V order form. The Form 2333V is an electronic order form that allows VITA/TCE volunteers material for training and site assistance. The order form is used to request VITA/TCE materials intended for assisting taxpayers.

2024 Project Committee Work

- Issue 65214-US Citizens Abroad with Retirement Income (Sub-1)
- Issue 66513-New Envelopes for Refund Checks (Sub-2)
- Issue 67239-Electronic Power of Attorneys for Overseas Taxpayers (Sub-2)
- Issue 71912-Prioritize Zero Tax Liability for International Taxpayers to Use Direct File by 2025 (Sub-1)

- Issue 68581- Expanded VITA program services for international taxpayers (Sub -1)
- Issue 48551- Treatment of Deceased Taxpayers (From 2021, Sub -1)
- Issue 71914 – Access to free fillable forms for international taxpayer for tax year 2024 (Sub-2)

Action Items

Ross will do the following:

- Send approved April meeting minutes to Kevin
- Update SAMS on issues from the Screening Committee
- Send members a listing states that TAP has no or little representation (Cedric sent during meeting)
- Send Speak Up Brochures to Members (Cedric sent email to Kevin)
- Invite SPEC Chief, Yolanda Weaver to attend our next meeting to discuss Issue 68581-Treatment of Deceased Taxpayers
- Rename Issue 71912 in SAMS
- Set up a Parking Lot Meeting with the Screening Committee

Chair or Vice Chair of SP Committee Closing Comment

Lammers asked about Issue 48551-Jeans explained that this issue is being routed thru two different organizations for the IRS response. Lammers inquired about a Parking Lot meeting and Ross said she would set that up soon.

Cloyd stated she put in issues in Improveirs.org.

Steven Hall spoke about his outreach event he attended in White Plains, NY (Problem Solving Days). He will submit the suggestions he collected to Toni so that she can put them into SAMS.

Closing

Jeans closed the meeting at 10:00 p.m. EST.

**Next Meeting: June 12, 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.