

**Special Projects
Taxpayer Advocacy Panel (TAP)
Monthly Meeting Minutes
Wednesday, August 14, 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 |
| • Tiffany Grayson | Beaufort, SC | Member |
| • 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 |
| • 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 spoke about looking for ways to improve the TAP program this week during the staff training and updating the TAP member handbook. Artificial Intelligence (AI) is being considered to help with the workflow process. Jeans asked for any suggestions or recommendations relating to this subject.

Jeans reminded the committee to visit the tax forums as a way to get issues from the taxpayers. Jeans suggested sharing any suggestions or ideas for the 2025 TAP year during the Joint Committee (JC) planning session later this month.

Jeans thanked those who participated with the IRS online focus group since they gained lots of information from this session from us. Please share suggestions for this topic if you have them. Robert Foley, from Massachusetts, resigned, according to Jeans.

Approval of Minutes

The July 10, 2024, meeting minutes were presented for approval. Hoffman motioned; Jude seconded.

Action: Minutes approved as submitted.

Chair Report

Bell reported:

The two issues sent to the JC Issue 71913 and Issue 71914 were approved and elevated to the IRS for consideration last month. Issue 71912-Prioritize Simple Returns for International Taxpayers to Use Direct File by 2025, was responded to by the IRS with all three issues are under consideration. Jeans indicated there is no true timeline for when they will respond, but they generally reply within 60 days. We hope they stay within that time frame for this issue.

Bell indicated there is a focus on getting more than one international member for next year, which will be suggested at the JC planning meeting.

Outreach Report

Hall Reported:

- Please continue to do Outreach

Nothing really to report but appreciates all the efforts for members doing outreach at this point in time. Hall wondered if it is a matter that we are not reporting our outreach ours. The request is that we account for all of our TAP work and outreach activities. Hall gave ideas for outreach such as personal conversations about TAP or passing out Speak-up brochures. Hall is willing to assist for outreach options, if needed. Hall thanked Foley for everything he did for the TAP.

- TAP Newsletter (Newsletter due to Vice Chair on the twenty-third of the month- (Steven Hall for August)
- Update your **Activity Record** in **www.TAPSpace.org**

Ross suggested members completely fill out their activity reports and account for all of their hours on the report. This will be used to determine if you are eligible for the Presidential awards also.

Subcommittee 1: Report out- Lammers

- Issue 63737-Data on Wage and Income Transcripts

Cloyd explained this issue seeks to have the full Employee Identification Number (EIN) on the transcripts so they can be used to aid filing state and federal taxes. This is especially important in the event that the employer no longer exists, or any other issues come up. Ross indicated this issue is going through the Attorney Advisors (AA) and Systemic Advocacy (SA) review process currently. Lammers motioned; Cloyd seconded.

Action: Issue elevated to JC for consideration (Pending the AA/SA review)

- Issue 75256- Login.gov Should be Replaced by ID.me

Jude explained this issue would give international taxpayers access through www.login.gov as a choice for security reasons. Lammers motioned; Jude seconded.

Action: Issue elevated to JC for consideration (Pending the AA/SA review)

- Issue 71593-Foreign Direct Bank Deposit

Lammers indicated this issue is currently being worked.

Subcommittee 2: Report Out- Grayson

- Issue 67239-Electronic Power of Attorney for Overseas Taxpayers

Stop delays to allow completion of Power of Attorneys for taxpayers to be able to have their tax requirements from this process. Hall motioned; Lammers seconded.

Action: Issue elevated to JC for consideration (Pending the AA/SA review)

- Issue 64976- Provisions of Taxpayers Income Information on Online Portals

Dropped as it did not warrant time since it was a non-issue.

- Issue 74358-Credit Transfer Tool

Questions were submitted to the Subject Matter Expert (SME) for further consideration on this issue. Ross will share a response for the next subcommittee meeting regarding this issue.

Screening Report

Lammers reported reviewing 21 issues:

16 dropped

Two referred to Taxpayer Advocate Service (TAS)

Four associated with other issues

Five placed in the Parking Lot

Internal Communications Committee (ICC)

Jude spoke of the next meeting being changed. The committee reviewed Issue 68481 and it is currently being worked. The committee continues to look for Facebook administrators for support.

Roundtable

Cloyd doing research on future issues. Grayson will attend an event this weekend at a local festival. Grayson heard from the Local Taxpayer Advocate (LTA) who will have a Congressional event in the fall. Grayson will be attending this future event. Hall indicated that his first year and second year has been a night and day difference which has made for a more positive year with issues.

Jude will reach out to the LTA again for next month and has identified some groups to possibly do outreach with, in the near future. Lammers joined Tax Forms & Publications committee for an issue regarding Form 8938. This issue may be going to the JC meeting this month. Lammers was contacted by TAS for focus group participants on tax and financial literacy for taxpayers abroad. This will be part of the Annual Report to Congress.

Action Items

- Send approved July meeting to Kevin
- Send issues 63737, 75256, and 67239 to JC

Chair or Vice Chair of SP Committee Closing Comment

Hall reflected on all the hard work we did this year and encouraged us to finish up strong and finish up issues we are working on. Bell asked for anything to send to JC planning meeting. Bell mentioned that our referrals have received compliments by the JC for the good referrals.

Closing

Jeans good jobs for this volume of work this year. Taxpayers around the world appreciate the work of this committee. Jeans closed the meeting at 11:45am ET.

Next Meeting: September 11, 2024, at 11:00am EST/12:00pm CST/1:00pm MST/2:00pm PST/7:00am AST/6:00am HST