

**Special Projects
Taxpayer Advocacy Panel (TAP)
Monthly Meeting Minutes
Wednesday, September 11, 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 (Absent) |
| • Tiffany Grayson | Beaufort, SC | Member |
| • Steven Hall | Long Island, NY | Vice-Chair |
| • Steven Hoffman | Westford, PA | Member |
| • Jihan Jude | Orlando, FL | Member (Absent) |
| • Rebecca Lammers | International/London | Member (Absent) |
| • Jared Lefevre | Billings, MT | Member (Absent) |

Staff

- | | |
|--------------------------|--|
| • Kevin Brown | Management Assistant |
| • Shawn Collins | TAP Director |
| • Conchata Holloway | TAP Program Analyst |
| • Kelvin Johnson | TAP Program Analyst |
| • Robert Rosalia | TAP Program Analyst |
| • Antoinette “Toni” Ross | TAP Program Analyst |
| • Robert Rosalia | TAP Program Analyst |
| • Ann Tabat | TAP Program Analyst |
| • Dale Hawkins | Program Analyst Taxpayer Services (TS) |
| • John Manhire | Legal Admin. Specialist Systemic Advocacy (SA) |
| • Benjamin Scheuring | Legal Admin. 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

Approval of Minutes

The August 14, 2024, meeting minutes were presented for approval. Hoffman motioned; Cloyd seconded.

Action: Minutes approved as submitted.

Chair Report

Bell reported:

Three issues were approved by the JC and sent to the IRS:

- Issue 63737-Data on Wage and Income Transcripts
- Issue 75256-Login.gov Should be Replaced By ID.me
- Issue 67239-Electronic Power of Attorney for Overseas Taxpayers

JC Face to Face Planning Meeting voting for the Chair and Vice-Chair and whether it should be majority or plurality of votes. The decision was made for it to be a majority vote only. The survey results need to have more participation than 20 or 30 members. There was a discussion on allowing members to serve back-to-back tenures instead of the three-year moratorium.

Bell continued that a discussion was held regarding Subject Matter Experts (SMEs) and why we were asking for them. Before a referral is sent up, we need to verify that is still an issue. There is an effort to limit the amount of tax professionals, but we pushed back that we need to keep some tax professionals on the panel. The last part of this discussion was that more Facebook administrators is needed.

Outreach Report

Hall Reported:

- Please continue to do Outreach
- TAP Newsletter (Newsletter due to Vice Chair on the twenty-third of the month- (Jihan Jude for October)
- Update your **Activity Record in www.TAPSpace.org**

Subcommittee 1: Report out- Cloyd

- Issue 71593- Foreign Direct Bank Deposit

Still being worked

- Issue 71578- Notification from IRS Regarding Expired ITINS

This issue is still being drafted. We are asking for a reminder from IRS prior to expiration. Hall indicated that contact numbers, addresses, names, and titles need to be kept up to date. Also acceptance agents should be kept up to date.

- Issue 74278- Problems with Where's My Refund for International Taxpayers

The primary recommendation is to allow a bypass for zip code for international access.

Subcommittee 2: Report Out- Hoffman

- Issue 67583- Provide Clarity on Free File Pricing Under IRS.gov (Presenting this referral to the full committee for forwarding to the JC)

The main issue is informing taxpayers what documents require payments since this is supposed to be free service. Hoffman motioned; Hall seconded

Action: Issue elevated to JC for consideration

- Issue 74358- Credit Transfer Tool

IRS is aware of this issue and working hard to fix it.

Issue 66339- Going to Appeals

We are asking for more information since most taxpayers that go through the appeals process loses. We are still receiving more of the percentages and still issue is still being researched.

Screening Report

Bell reported 21 issues screened: (8 dropped; 7 placed in the Parking Lot; 4 active Issues; 2 New Project Proposals)

New Project Proposals to be given to the Subcommittees:

- Issue 67748-Postal Codes in Direct Pay (Sub-1)
- Issue 61892-Instructions for Form 8621 (Sub-2)

Internal Communications Committee (ICC)

Ross reported Issue 68481 is still being reviewed and discussed. Facebook page submissions were discussed, and administrators still being sought out.

Roundtable

Cloyd reached the DC Bar Taxation Committee and law school to hear about the issues they are encountering.

Grayson will meet with the Black Chamber of Commerce for Beaufort County to see how we can help them.

Action Items

- Send approved August meeting to Kevin
- Send Issue to 67583 to JC after AA/SA review

Chair or Vice Chair of SP Committee Closing Comment

Hall reported first years should join the annual report committee to build a solid foundation to find out what other committees are doing. Plenty of outreach out there, you have to look for it. Bell said face to face are really nice and noted we



are doing really well with the # and quality of referrals. Nice to know we have a really good group and acknowledged all the work the committee is getting done.

Closing

Jeans Sept 26, 2pm ET Stakeholder Partnerships, Education & Communications (SPEC) outreach scheduled. Goal provide awareness of current scams and schemes. If you'd like to attend, Jeans can provide the link.

Jeans closed the meeting at 11:31am ET.

**Next Meeting: October 9, 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.