

**Special Projects  
Taxpayer Advocacy Panel (TAP)  
Monthly Meeting Minutes  
Wednesday, October 9, 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 (Absent) |
| • Steven Hall         | Long Island, NY      | Vice-Chair      |
| • Steven Hoffman      | Westford, PA         | Member (Absent) |
| • Jihan Jude          | Orlando, FL          | Member          |
| • Rebecca Lammers     | International/London | Member          |
| • 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) |

**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 the recruitment package bringing on 26 new members for 2025. The package will be reviewed by the National Taxpayer Advocate (NTA), the Commissioner and then to Treasury. Jeans spoke about the Celebration of Service for the third-year members on November 15, 2024, at 1pm ET.

Jeans spoke about the Annual Report committee which is assigned to highlight the successes of this year and to fight on for recommendations that were not adopted. This report will be reviewed by the NTA, the Commissioner, the Ways and Means committee, and many members of Congress. You can still volunteer for the committee if you would like.

Holloway reported the timeline for the Chair elections process:

- October 15, 2024, 1-2 pm ET Informational Session National Chair and Vice chair will speak at this meeting.
- October 18, 2024, midnight nominations and self-nominations. Prior approval is required for nominations.
- November 6, 2024, 12 ET Meet the Candidates.
- November 8-14, 2024. Voting period.
- November 15, 2024, announcement of winners.

### **Approval of Minutes**

The September 11, 2024, meeting minutes were presented for approval. Lammers motioned; Hall seconded.

**Action: Minutes approved as submitted.**

### **Chair Report**

Bell reported:

- Issue 67583-Provide Clarity on Free File Pricing Under IRS.gov was accepted by the JC
- TAP Annual Report

Bell thanked all those who volunteered for this committee.

### **Outreach Report**

Hall Reported:

- Please continue to do Outreach
- TAP Newsletter (Due to Vice Chair on the twenty-third of the month- (Steven Hoffman for November)
- Update your **Activity Record in [www.TAPSpace.org](http://www.TAPSpace.org)**

Highlighted the importance of completing the activity reports. Hall thanked Cloyd, Bell for their individual outreach events.

Hall thanked the committee for electing him for this role and shared that this is the best committee in TAP. Hall shared that he appreciates all of their work and outreach of this committee. Hall has outreach planned for next month. Hoffman will do the newsletter article for this month.

### **Subcommittee 1: Report out- Lammers**

- Issue 63737-Data on Wage and Income Transcripts  
Deferred for next month for full committee discussion.
- Issue 71578-Stay Informed on ITIN Expirations and Review Foreign Agent  
Details on IRS.gov

Hall reported that this issue seeks to notify taxpayers before their Individual Taxpayer Identification Number (ITIN) expires. The IRS should do an annual audit to ensure information on the website is accurate. Hall motioned; Lammers seconded.

**Action: Issue elevated to JC for consideration. Pending Quality Review (QR); SA and AA Reviews**

- Issue 74276-Identify Verification for International Taxpayers on Where's  
My Refund

Jude reported that this issue seeks to address the zip code format required to verify identity so international taxpayers can be verified. The IRS should provide additional ways to verify a taxpayer's identity such as SSN, ITIN, Filing status or exact refund amount. Jude motioned; Lammers seconded.

**Action: Issue elevated to JC for consideration. Pending QR, SA and AA Reviews.**

- Issue 71593-Foreign Direct Bank Deposit  
Issue still being worked and may have another issue associated with it.

### **Subcommittee 2: Report Out- Ross**

New Project Proposals:

- Issue 70063-Insuance of an Estate Tax Closing Letter (ETCL)  
Questions presented to a Subject Matter Expert (SME) with response pending.

- Issue 67748-Postal Codes in Direct Pay  
Draft Referral for this issue being worked on.

- Issue 66339-Going to Appeals (Research: Need more information on how  
appeals were disposed of) Hoffman sent information to Sub-2 members.

### **Internal Communications Committee (ICC)**

Jude reported the committee working Facebook page and organizing different post to be made. They reviewed Issue 68481 allowing members of the public to join and email list for TAP meetings.

### **Screening Report**

Lammer reported reviewing 13 issues:  
2 parking lot, 11 dropped. All issues reviewed for this year. Next meeting near end of October per Ross.

### **Roundtable**

Lammers organized a problem-solving meeting which was successful for 28 taxpayers. Many were resolved that day, and numerous taxpayers sent thank-you messages.

Lammers will organize another one for Hawaii which has 17 signed up so far with taxpayers from Singapore, China; Canada; Indonesia; Japan, New Zealand; and St. Kitts and Nevis. Lammers will continue to do this next year as it is a valuable service. The IRS announced the Direct File will be expanded to 24 or 25 states for 2025, but no mention of international taxpayer support. There is a letter circulating Congress requesting access to this for international taxpayers. Ross and Jeans will follow up on the previous request from Lammers.

Lammers inquired about the SME request for the international phone line that seems to not have been responded to. Jeans suggested starting the project even without input from an SME. Bell asked can we add more international members, a waiver to allow back-to-back members serve or have a one-year overlap for international members for better coverage. Jeans indicated that this is being discussed, but the TAP Membership Balance Plan has to be respected.

### **Action Items**

- Send approved September meeting to Kevin.
- Send Issue to 71578, and 74276 to JC after QR review.
- Analyst will follow up with SME for International Phone Lines Issue.

### **Chair or Vice Chair of SP Committee Closing Comment**

Hall thanked the first-year members and hoped they learned a lot from them and come back next year even stronger. Hall spoke about everyone and how important they have been for this TAP year. Bell hopes that everyone votes in this election please. Please put in any time you use working on TAP issues.

### **Closing**

Jeans thanked Hall and all the leadership for the committee this year and recognized the important work done. Jeans closed the meeting at 11:48am ET.

**Next Meeting: November 13, 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.**