

**Special Projects
Taxpayer Advocacy Panel (TAP)
Monthly Meeting Minutes
Thursday, February 20, 2025**

Designated Federal Officer (DFO)

- Cedric Jeans TAP East Chief

Attendance

- | | | |
|---------------------------------|----------------------|-------------------|
| • Dr. Olurotimi “Timi” Akindele | Chicago, IL | Member |
| • Jason Brinkley | Prince Frederick, MD | Member |
| • Stacey Cloyd | Washington, D.C. | Member Vice-Chair |
| • Aissata Diaby | Harrisburg, PA | Member (Absent) |
| • Tiffany Grayson | Beaufort, SC | Member |
| • Steven Hall | Long Island, NY | Member Chair |
| • Jihan Jude | Orlando, FL | Member |
| • Joseph Parampathu | Irvine, CA | Member |
| • John Shoemaker | INT Singapore, China | Member |
| • Wayne Segal | Wilmington, DE | Member |

Staff

- | | |
|--------------------------|----------------------|
| • Kevin Brown | Management Assistant |
| • Gulden Durdu | TAP Program Analyst |
| • Conchata Holloway | TAP Program Analyst |
| • Kelvin Johnson | TAP Program Analyst |
| • Antoinette “Toni” Ross | TAP Program Analyst |
| • Ann Tabat | TAP Program Analyst |

Members of the Public

None

Welcome Announcements/Comments/Acknowledgements

Cedric Jeans opened the call and welcomed all who joined. Jeans reminded the committee that they function similar to how Congress functions with committees, votes and representing each member’s state. Jeans reported:

1. The face-to-face meeting in Jacksonville, FL from April 21-25, 2025.
2. Please review and vote on the bylaw changes by the end of this month.
3. Review and vote on bylaws changes by the end of the month.
4. Announced the 2024 Annual Report is almost ready.
5. The National Taxpayer Advocate (NTA) asked us to bring up at least one of the Most Serious Problems (MSP) to add to her list. This needs to be worked pretty soon and is a great task for TAP.

Self-Introductions/Roll Call

The TAP members and TAP staff introduced themselves, shared a self-introduction and gave a brief biography.

TAP Meeting Procedures

Ross reviewed the meeting procedures.

- **Ground Rules**

Listen to the ideas and opinions of your fellow panel members and give everyone the time to speak their minds. Above all, be respectful of one another.

Stay within the allowed meeting time.

Respect and be courteous to all members and staff.

Participate and take part in this process.

- **Telephone & E-Mail Etiquette**

Please arrive five minutes ahead of your call.

Identify yourself.

Limit the side bar conversations.

Mute yourself when not speaking.

Participate and don't get discouraged.

Do not reply all or cc everyone unless necessary.

Consider others time and feelings during these meetings.

- **Minutes/Minutes Approval**

Please review the meeting minutes, agendas, and pre-reads prior to each meeting. The Chair, DFO and analyst will work on pre-reads before each meeting.

- **Establish Quorum & Consensus**

50 percent plus one person is quorum.

Documents will be shared via MS TEAMS for documents

- **Agenda & Pre-Read Information**

This will be sent via email and also posted on www.tapspace.org.

- **Activity Reports/Time Reporting**

www.tapspace.org; www.improveirs.org

- **Methods of Communication**

Email, telephone, fax, and MS TEAMS

Ross quickly reviewed the issue screening process, so the committee knows how issues come in and how they are received from the public.

So You want to Be A Chair?

Ross explained the responsibilities for the Chair and Vice-Chair positions.

Nominations and Election process (Chair/Vice-Chair)

- Nominate Candidates

Steven Hall self-nominated for Chair.

John Shoemaker self-nominated for Vice-Chair

Stacy Cloyd self-nominated for Vice-Chair

- Self-Introduction/Bios

Election Results

Steven Hall ran unopposed for committee Chair.

Stacy Cloyd was voted to committee Vice-Chair.

Approval of Minutes

November 8, 2023, minutes will be added to next month's agenda.

Establishment of Subcommittees and Meeting Dates:

Full committee meeting- Second Thursday at 11am ET.

Subcommittee 1(International Issues) Meeting- First Thursday 11am ET.

Tiffany Grayson; Steven Hall; Joseph Parampathu; Wayne Segal; John Shoemaker.

Subcommittee 2 Meeting- First Thursday 1pm ET

Dr. Timi Akindele; Jason Brinkley; Stacy Cloyd; Jihan Jude; Aissata Diaby.

Outreach: Stacy Cloyd

Screening Members: Jude; Segal; Shoemaker; and Parampathu

Quality (QR) Grayson; Cloyd, Brinkley, and Shoemaker

Internal Communications: Jude and Shoemaker

2024 Project Committee Work

- **Issue 66912**-Clients living and working abroad are dual status- Sub. 1
- **Issue 69843**-Improve the experience of taxpayers who have ITINs. Sub. 1
- **Issue 74376**-Direct File Eligibility Requirements Sub. 2
- **Issue 74632**-Tax Pro Account Page- Sub. 2
- **Issue 75527** Expand Direct File Program Sub. 2
- **Issue 68536**-Vita Site and Custodial Parents Sub. 2

Action Items

Ross will do the following:

- Hall Chair; Cloyd Vice-Chair

- Monthly Meeting Second Thursdays at 11am ET
- Ross to send out TEAMS invite for the full and subcommittee meetings
- Read and vote on Bylaws by February 28, 2025, by every member.
- Ross to forward Project Proposals subcommittees
- Sub.1 Issues 66912; 69843
- Sub. 2 Issues 68536; 74376; 74632 and 75527

Roundtable

Hall thanked everyone for joining and is looking forward to a good year. Jeans thanked everyone for joining the call.

Chair or Vice Chair of SP Committee Closing Comment

Closing

Jeans closed the meeting at 1:00pm ET.

**Next Meeting: March 13, 2025 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.