

**Tax Forms & Publications Committee, (TFP)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, February 25, 2025**

Designated Federal Officer (DFO)

- Cedric Jeans TAP East Chief

Members Present

- | | | |
|-------------------------|-------------------|-----------------|
| • Cathy Bryant | Evansville, IN | Member |
| • Robert “Rob” Calloway | Stockbridge, GA | Member (Absent) |
| • Jason Crispin | Toms River, NJ | Chair |
| • Fritz-Gerald Delice | Dacula, GA | Member |
| • Ellen Dickey | Dakota Dunes, SD | Vice-Chair |
| • Joel Gelb | Spring Valley, NY | Member |
| • Joseph “Joe” Hall | Milford, OH | Member |
| • Chris Niccolls | New York, NY | Member |
| • Gideon Rothschild | New Hartford, CT | Member |
| • Donald Williamson | Bethesda, MD | Member |

Staff

- | | |
|---------------------|--------------------------|
| • Kevin Brown | TAP Management Assistant |
| • Conchata Holloway | TAP Program Analyst |
| • Kelvin Johnson | TAP Program Analyst |
| • Ann Tabat | TAP Program Analyst |

Public Participants

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 Phoenix, AZ from April 21-25, 2025.
2. Please review and vote on the bylaw changes by the end of this month.
3. Announced the 2024 Annual Report is almost ready.
4. 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 staff and TAP members introduced themselves and shared a self-introduction and gave a brief biography. Quorum was met.

TAP 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

- Methods of Communication

Email, telephone, fax, and MS Teams

So, You want to Be A Chair?

Tabat provided an overview of what the responsibilities are for a committee chair, vice chair and what is expected of these positions. Additional TAP leadership positions regarding leads of each subcommittee were provided.

Nominations and Election process (Chair/Vice-Chair)

- Nominate Candidates

Jason Crispin self-nominated.

Jason Crispin nominated Ellen Dickey for Vice-Chair. Nomination accepted by Dickey.

Both nominees ran unopposed and were unanimously elected by the committee.

Approval of Minutes

November 14, 2024, minutes will be on next month's agenda.

Establishment of Subcommittees and Meeting Dates:

- Full committee Second Tuesday at 2:00pm ET
- Subcommittee 1- First Tuesday 11:30am ET
Ellen Dickey; Cathy Bryant; Fritz-Gerald Delice; Chris Niccolls; Donald Williamson
- Subcommittee 2- First Wednesday 2:30pm ET
Rob Calloway; Jason Crispin; Joel Gelb; Joe Hall; Gideon Rothschild
- Outreach (Vice-Chair)- Ellen Dickey
- Screening Team
Jason Crispin; Chris Niccolls; Joe Hall; Donald Williamson
- Quality Review (QR)
Donald Williamson; Gideon Rothschild; Ellen Dickey; Jason Crispin
- Internal Communications
Donald Williamson

Tabat provided an overview of the issue screening process and shared a screening report, so the committee knows how issues come in and are received from the public.

2025 Project Committee Work

- **Issue# 69638** Form 8936 Clean Vehicle Credits & Instructions-Roll over from 2024 assigned to (Sub. 2)
- **Issue# 77867** -Taxpayer Understanding of Form 8821 assigned to (Sub. 1)
- **Issue# 66620** -Form 1099-NEC & 1099 IRIS System assigned to (Sub. 2)
- **Issue# 74509** -Form 1040-X box for dependent assigned to (Sub. 1)

Action Items

- Chair- Crispin, Vice-Chair- Dickey.
- Full meeting Second Tuesday at 2:00pm ET.
- Sub. 1 First Tuesday at 11:30am ET.
- Sub. 2 First Wednesday at 2:30pm ET.
- Tabat to send meeting recurring invites and pre-reads for subcommittee work.

Meeting Assessment/Next Steps/Closing

Jeans congratulated leadership and looks forward to working with the committee this year. Jeans thanked everyone for joining and closed the meeting at 12:49pm ET.

The next monthly meeting
March 11, 2025, at 2:00pm EST/1:00pm CST/12:00pm MST/11:00am PST

These minutes have been approved and certified by the committee chairperson.