

**Special Projects
Taxpayer Advocacy Panel (TAP)
Monthly Meeting Minutes
Thursday, March 13, 2025**

Designated Federal Officer (DFO)

- Cedric Jeans TAP East Chief

Attendance

- | | | |
|---------------------------------|----------------------|-------------------|
| • Dr. Olurotimi “Timi” Akindele | Chicago, IL | Member |
| • Jason Brinkley | Prince Frederick, MD | Member (Absent) |
| • 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 (Absent) |
| • John Shoemaker | INT Singapore, China | Member |
| • Wayne Segal | Wilmington, DE | Member (Absent) |

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 |

Welcome/Opening

Roll Call

Brown completed the roll call.

National Office & DFO Report

Jeans reported the staff is working on the business card and Speak-Up brochure orders at this time and they will be delivered soon. Jeans reminded everyone to ask for brochures if they need more.

Jeans reported the National Taxpayer Advocate (NTA) is asking for input for her Most Serious Problems (MSPs). The turnaround time by close of business Tuesday, March 20, 2025, by email. Last year’s MSPs and the TAP annual report are now available on www.improveirs.org, per Jeans.

Jeans reported the federal register notices were not allowed to be posted at this time, meaning our meetings are not open to the public. Next month's meeting will be open to the public and allow us to vote on issues.

Jeans referenced the TAP Outreach Toolkit, which contains numerous documents that would be helpful for outreach. This includes a press release should one be needed. The Taxpayer Advocate Services Communications Liaison unit can help also if it is needed per Jeans.

Jeans spoke about www.tapspace.org which is used to share documents and share information. Jeans asked everyone to go in and update your profile with all your experiences that may be useful to other members. Let Tabat know if you do not have a mentor. Jeans announced the merging of the Outreach and Internal Communications committees. Jeans mentioned return to office process for federal employees, travel being cancelled, and a possible reduction in force. The staff will keep the committee informed about all these topics.

Collins reported due to travel restrictions there will be no face-to-face meeting. We are working on a virtual meeting which will be shared as soon as it has been finalized. Speak with your analyst before you do any travel for outreach to ensure we can reimburse you it.

Committee News & Updates

- **Issue 66912**-Clients living and working abroad are dual status
- **Issue 68536** – Vita Site and Custodial Parents
- **Issue 69843**-Improve the experience of taxpayers who have ITINs
- **Issue 74376**-Direct File Eligibility Requirements
- **Issue 74632**-Tax Pro Account Page
- **Issue 75527**-Expand Direct File Program
- **Issue 78232**-Department of Homeland Security is trying to get

Hall shared that these issues are being worked still.

Review of Minutes

- November 13, 2024- tabled
- February 20, 2025- tabled

TAP Committee Update

IRS Responses Received:

Awaiting IRS Responses:

Referrals submitted JC:

Thanked the returning members and the new members. Indicated that returning members will be there to support all the new members. Hall explained the purpose of the outreach and shared a success story from a taxpayer that was

helped by his outreach. Hall wants members to keep in mind the focus of TAP while conducting outreach which will help you do it well.

Cloyd spoke of a possible issue regarding IRS sharing Personally Identifiable Information (PII) with Homeland Security. This may be a Most Serious Problem.

Outreach Report

- TAP Newsletter (Future Newsletter Articles)- Cloyd: April; Hall: May
- Activity Report
- Outreach

Cloyd asked members to share any exciting outreach with the committee. Hall had an event that he used a Taxpayer Bill of Rights (TBOR) sign. Cloyd has reached out to the D.C. BAR tax section; the head of her Volunteer Income Tax Assistance (VITA); and the Washington D.C. congressional member for outreach opportunities. Kelvin Johnson will be reaching out to each Local Taxpayer Advocate (LTA) introducing them to their TAP member and seeking outreach opportunities for our members. Johnson asked for write-ups and pictures for their outreach events.

Subcommittee 1: Hall

- Issue 66912-Clients living and working abroad are dual status
Issue being worked.
- Issue 69843-Improve the experience of taxpayers who have Individual Taxpayer Identification Number (ITIN)s
Issue being worked.

Subcommittee 2: Cloyd

- Issue 68536 – Vita Site and Custodial Parents
Issue being worked and researched.
- Issue 74376-Direct File Eligibility Requirements
- Issue 75527-Expand Direct File Program
Both issues being worked and researched.
- Issue 74632-Tax Pro Account Page
Issue being worked and researched.

Screening Report:

Screening Meeting held on March 5, 2025. Five are proposed projects; three were transferred to other committees; and 12 were dropped. The results are awaiting committee approval.

Internal Communications Committee

New meeting is, March 20, 2025, at 1pm ET

Action Items

Johnson will do the following:

- Subject Matter Expert (SME) requested for Issue 68536
- SME requested for Issue 74632
- Issue 69843 updated in www.tapspace.org
- Issue 78232 updated in www.tapspace.org
- Hall doing next newsletter article

Roundtable

Hall had concerns with the future of the Direct File Program.

Chair or Vice Chair of SP Committee Closing Comment

Jeans spoke of how important the work that TAP does is to the American public. Please speak about the importance of TAP while you are doing your outreach. Jeans indicated that the TAP has a faster impact with our work and that the IRS responds quickly to TAP recommendations in addressing taxpayer issues. This is faster than most other federal advisory committees. The JC will be meeting on Friday, March 14, 2025, at 12 noon. Feel free to join.

Hall thanked everyone for attending the call and encouraged members to continue outreach and TAP work.

Closing

Jeans closed the meeting at 11:53am ET.

**Next Meeting: April 10, 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.