

TAP – One Voice for Change

“Citizen Volunteers Valued for Improving IRS Services”

2025 Special Projects Full Committee Meeting Minutes

Thursday, August 14th, 2025

11:00am ET, 10:00am CT, 9:00am MT, 8:00am PT

Administrative	Leader
Opening	Robert Rosalia, Program Analyst, opened meeting
Roll Call	<p>Robert Rosalia conducted roll call.</p> <p>TAP member attendees: Jason Brinkley, Steven Hall, John Shoemaker,</p> <p>TAP member absent: Dr. Timi Akindele, Stacy Cloyd, Aissata Diaby, Jihan Jude, Joseph Parampathu</p> <p>IRS attendees: Public attendees: Melinda Purcell (TAS/SA)</p>
Welcome	Steven Hal, SP Committee Chair, welcomed the members.
National Office Report	<p>Fred N. Smith, Jr., Acting TAP Manager, shared updates to the Local Taxpayer Advocate (LTA) Listing, noting the Houston changes. Informed them the Pub 4134 lists all Low-Income tax clinic's (LITC) locations, and it can be useful in networking. It shares the names and contact information of the clinics across the US and PR. Also found here - Low Income Taxpayer Clinics (LITC) - Taxpayer Advocate Service</p> <p>Fred talked about his findings when talking to Chief Counsel and since the only TAP committee that makes recommendations to the IRS is the Joint Committee. The JC is the only committee that must follow FACA requirements. This means that instead of operating by quorum we can use a consensus vote. However, we are still posting all committee (including project) on our improveIRS site - Committee Meetings - Taxpayer Advocacy Panel</p> <p>John Shoemaker asked if this change in quorum be communicated with the rest of TAP and Fred that in addition to being part of the committees meeting report out an e-mail will go to all members as well.</p>

<p>Committee News & Updates</p>	<p>Steven Hall reported that Tiffany Grayson (SC) has stepped down from TAP and thanked her for her volunteerism. Report on an article he read on Social Security checks going paperless in September. https://www.newsday.com/long-island/social-security-paper-direct-deposit-sept-30-rnz1uhyo.</p> <p>Discussed the Joint Committee Planning session and how they talked about the future state. He requested members of SP to send in changes they would like to see with TAP. He shared his viewpoints that included adding additional international members and the possibility of adding interns to the panel.</p> <p>Project Updates:</p> <ul style="list-style-type: none"> • Project 78238-Protecting Taxpayer Information- Voted to move to Parking Lot John Shoemaker motioned – Jason Brinkley 2nd the motion • Project 74276-Identity Verification for International Taxpayers- With the JC for August – Project was approved by 2024 SP committee for JC but was never approved to the IRS by the JC last year. • Project 66912-Clients Living and Working Abroad Dual Status- Additional look at perfecting recommendations - Back to the Subcommittee for next month <p><i>IRS Responses Received:</i></p> <ul style="list-style-type: none"> • Project 71913-Provide Safe Harbor for International Taxpayers who received the Expanded Child Tax Credit for 2021- Accepted IRS responses/Project closed John Shoemaker motioned – Jason Brinkley 2nd the motion <p>Approval of Minutes:</p> <ul style="list-style-type: none"> • June 12th, 2025, Meeting Minutes Accepted as written John Shoemaker motioned – Jason Brinkley 2nd the motion • July 10th, 2025, Meeting Minutes Accepted as written Jason Brinkley motioned – John Shoemaker 2nd the motion
<p>Outreach Report:</p>	<ul style="list-style-type: none"> • John Shoemaker, Reporting out on behalf of Stacy Cloyd <ul style="list-style-type: none"> - Speak-up brochures were updated and now available for download. - TAP Newsletter <p>November will be completed by John Shoemaker</p>
<p>Subcommittee 1:</p> <ul style="list-style-type: none"> • 	<p>John Shoemaker - Subcommittee 1 Lead</p> <ul style="list-style-type: none"> - Systemic Advocacy SME joined their call and discussed the DUT enhancements. • Project 78407-IRS Customer Service Inefficiencies <ul style="list-style-type: none"> - Looking at adding cross reference to other TAP recommendation to some of the recommendations • Issue 78408-FIRPTA Withholding Certificate Difficulties

	<ul style="list-style-type: none"> - Will defer voting on the project proposal until all of TAP are aware of the new voting procedures – will continue with preliminary work
Subcommittee 2:	<p>Jason Brinkley - Subcommittee 2 Lead</p> <ul style="list-style-type: none"> • Project 78784-IRS Customer Service Inefficiencies Related to Fax Communications <ul style="list-style-type: none"> - Additional project work to continue as they go over research • Project 78777-Improve IRIS and Transmitter Control Code Registration <ul style="list-style-type: none"> - Reviewing recommendations and may have it complete for next month
Screening Report:	<p>Robert Rosalia</p> <p>SP will schedule a screening team meeting in September</p>
Chair Closing Comments & Roundtable	<p>Steven Hall thanked the committee for the great work they do and the time they take out their life to make the tax administration better for everyone.</p> <p>Committee Chair</p>
Closing-Program Analyst	<p>Robert Rosalia adjourned the meeting</p>

Next Meeting
September 11th, 2025, 11am ET