

**Special Projects  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Thursday, June 12, 2025**

**Designated Federal Officer (DFO)**

- Fred N. Smith, Jr. TAP Special Analyst

**Attendance**

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

**Staff**

- Kevin Brown Management Assistant
- Saul Hernandez Acting TAP Director
- Robert Rosalia TAP Program Analyst
- Ann Tabat TAP Program Analyst
- Rosalind Matherne TAP Program Analyst
- Kudiratu Usman-Olugunna TAP Program Analyst
- Mejbeen Balsara Taxpayer Services Program Analyst

**Welcome/Opening – Designated Federal Officer (DFO)**

Smith opened the call and welcomed all who have joined.

**Roll Call**

Brown completed roll call and quorum was met.

**Welcome Announcements/Comments/Acknowledgements**

Hall welcomed all and is looking forward to a good meeting.

**Comments From the Public**

N/A

### **National Office and DFO Reports**

Smith welcomed everyone to the call introduced Saul as the Acting Director. Hernandez introduced himself and is looking forward to a good meeting. Hernandez also reminded the committee that an updated list of Local Taxpayer Advocates (LTAs) will be shared as soon as we receive it.

### **Committee News & Updates**

Hall encouraged everyone to push through and adapt to these different changes to ensure this is an impactful year. Hall will start preparing for the annual report and is open to any assistance from the committee.

*Referrals submitted to Joint Committee (JC) May 22, 2025:*

**Issue 69843**-Improve the Experience of Taxpayers Who Have ITINs  
Approved and elevated to the IRS for consideration.

**Issue 78232**- Protecting Taxpayer Information-Did not pass JC, waiting to determine next steps. Hall encouraged everyone to stay resilient and stay the course. Tabat will report any updates regarding this project.

- **Issue 66912**-Clients Living and Working Abroad Dual Status-Vote to approve to send to JC

Shoemaker motioned; Cloyd seconded.

**Action:** Issue elevated to JC as amended.

- **Issue 78777**-Improve IRIS and Transmitter Control Code Registration-Project proposal approval

Shoemaker motioned; Akindele seconded

**Action:** Issue 78777 approved as a project.

- **Issue 78784**- IRS Customer Service Inefficiencies Related to Fax-Project proposal approval

Brinkley motioned; Shoemaker seconded.

**Action:** Issue 78784 approved as a project.

*IRS Responses Received:*

- **Issue 61344**-Foreign Retirement Accounts (FRA)-vote to accept IRS response or rebuttal

Parampathu motioned; Brinkley seconded

**Action:** Response accepted at this time.

### **Approval of Minutes**

May 8, 2025, minutes reviewed. Shoemaker motioned; Akindele seconded.

**Action:** Minutes unanimously approved as submitted

### **Outreach**

Cloyd reported

- TAP Newsletter (Future Newsletter Articles)

Thanked all for helping so far. Cloyd noted sending the schedule out for the remainder of the year. Shoemaker inquired how the submission is completed. Cloyd explained the article is only for this committee.

- Activity Report

Add your activities to [www.tapSPACE.org](http://www.tapSPACE.org).

- Outreach

Cloyd noted that we have some restrictions to include the Speak-Up brochures, which a workaround is being considered. Cloyd asked the committee to hang tight for future guidance.

### **Subcommittee 1**

Shoemaker reported:

- **Issue 68581- Rebuttal**-Expand VITA, TCE and LITC Program for International Taxpayers

Shoemaker noted the rebuttal has been drafted for submission back to the IRS.

- **Issue 65838**-From Maine living in UK

This issue is being dropped as it was addressed in another referral. Shoemaker motioned to drop issue; Parampathu seconded.

**Action: Issue dropped**

- **Issue 78407**-IRS Customer Service Inefficiencies

Still being worked.

### **Subcommittee 2**

Cloyd reported:

- **Issue 78784**- IRS Customer Service Inefficiencies Related to Fax Communications

Cloyd reported that Jude will take the lead on this issue. The purpose of this issue is to ensure that the fax is not the only or the recommended method of sending information to the IRS. Make sure there are other options for people to submit documentation to the IRS. Shoemaker thinks fax should never be the only or preferred options. Multiple service channels are preferred.

- **Issue 78777**-Improve IRIS and Transmitter Control Code Registration

Still being worked. Cloyd is taking the lead and will work research to get familiar with the process.

### **Screening Report**

Tabat is sending the report to the screening team by close of business today.

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

Shoemaker requested the TAP staff member for the ICC for contact purposes. Smith indicated the ICC and Outreach committees have been combined so Smith is the staff member. Smith indicated if Shoemaker is not already on the meeting invite, he would add him to it. No current projects are being worked by ICC still combined with Outreach efforts for now.

### **Action Items**

Tabat will do the following:

- Forward May Minutes for posting.
- Project 66912 approved elevated to JC
- Project 78777 Sub-2 assigned, additional pre-reads
- Project 78784 Sub-2 assigned, additional pre-reads
- Project 61344 Response accepted, update in database
- Screening report will be sent out
- Issue 65838 dropped update in database

### **Chair Closing Comments and Roundtable**

Hall expressed gratitude for everyone's hard work and encouraged everyone to keep the reason why they joined TAP in the back of their head as they complete the work of TAP. Hall warned to expect more challenges, but he is confident that we will be successful with our work. Hall asked that we keep pushing forward and adapt to the changes to make this a productive year.

### **Closing**

Smith agreed this has been a productive year and thanked all for attending the meeting and all the work completed today. Smith closed the meeting at 11:45 a.m. ET.

**Next Meeting: July 10, 2025, at 11:00am ET.**