

**Special Projects
Taxpayer Advocacy Panel (TAP)
Monthly Meeting Minutes
Wednesday, March 13, 2024**

Designated Federal Officer (DFO)

- Cedric Jeans TAP East Chief

Attendance

- | | | |
|-----------------------|----------------------|-------------------|
| • Richard “Rick” Bell | Corpus Christi, TX | Member Chair |
| • Stacey Cloyd | Washington, D.C. | Member |
| • Aissata Diaby | Harrisburg, PA | Member (Absent) |
| • Robert “Bob” Foley | Natick, MA | Member |
| • Tiffany Grayson | Beaufort, SC | Member |
| • Steven Hall | Holbrook, NY | Member Vice-Chair |
| • Steven Hoffman | Westford, PA | Member (Absent) |
| • Jihan Jude | Orlando, FL | Member |
| • Rebecca Lammers | International/London | Member |
| • Jared Lefevre | Billings, MT | Member |
| • Debra Kurita | National Chair | Visitor |

Staff

- | | |
|--------------------------|----------------------|
| • Kevin Brown | Management Assistant |
| • Shawn Collins | Acting TAP Director |
| • Gulden Durdu | TAP Program Analyst |
| • Conchata Holloway | TAP Program Analyst |
| • Kelvin Johnson | TAP Program Analyst |
| • Robert Rosalia | TAP Program Analyst |
| • Antoinette “Toni” Ross | TAP Program Analyst |
| • Fred Smith | TAP Program Analyst |
| • Ann Tabat | TAP Program Analyst |

Members of the Public

None

Welcome Announcements/Comments/Acknowledgements

Cedric Jeans opened the call and welcomed everyone to the meeting. Collins welcomed everyone and thanked them for joining TAP. Kurita welcomed everyone to the call and is looking forward to working with everyone throughout the new TAP year

Self-Introductions/Roll Call

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

Comments From the Public

N/A

Self-Introductions

The TAP staff and TAP members introduced themselves and shared a small bit about themselves as a self-introduction.

TAP Mission

Cedric Jeans reviewed the TAP mission and reviewed the basic functions of TAP. The TAP listens to taxpayers, identifies taxpayers' issues, and makes suggestions for improving IRS service and customer satisfaction. Jeans explained that the public is invited to attend our calls and may be in future calls.

TAP reviews notices and correspondence to ensure they are easily understood by taxpayers. This is where we fix issues raised by the public. Jeans reviewed all of the six TAP committees and explained what their purposes are.

Jeans reviewed the charter since TAP is an agency sponsored organization and what we do to keep our charter active.

- Commit to volunteer time
- Identify grassroots issues
- Prepare annual report

TAS

- Funding
- Support staff
- Designated Federal Officers (DFO)

TAP Success Stories

- Longer extension of time to file taxes.
- Improvement recommendations to numerous tax forms and publications.
- Separate lessons for Affordable Care Act in Pubs 4012 & 4491, related to Volunteer Income Tax Assistance (VITA) and Taxpayer Counseling for the Elderly (TCE) Training.
- IRS Inform taxpayers currently in active Earned Income Tax Credit (EITC) audits of hours of availability and "live examiner" options.
- Recommended the callback feature to the toll-free lines.

Project Committees Responsibilities

- Work issues assigned from TAS or the IRS
- Work with IRS program owners and Subject Matter Experts (SMEs)
- Screen new issues

Recommendations

Decide whether to pursue an issue, transfer it to another committee, or drop it.

Focus on customer service improvement.

Should be fully developed, clearly written and significant for the taxpaying public.

Support Staff

- Appoint DFO for the project committees.
- Work with the panel and IRS to promote efficient project committees.
- Facilitate communication among all parties involved in the committee.
- Final review of recommendations referrals to ensure that all information matches the database.
- Research and analysis of issues
- Facilitate communication between IRS and TAP
- Review of referrals for structure and content
- Assist members in meetings.
- Consolidate outreach reports.
- Prepare travel documents/reimbursements.
- Help to develop TAP products such as Annual Report, Speak up Brochures, ImproveIRS.org and more.

Jeans indicated there would be more training in the in-person meeting in May of 2024.

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; www.improveirs.org;

- Methods of Communication
Email, telephone, fax, and MS TEAMS

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 Vice-Chair.
Richard Bell self-nominated for Chair

Both nominees running unopposed were voted unanimously as committee Chair and Vice-Chair.

Subcommittee- self-nominated
Subcommittee- self-nominated

- Self-Introduction/Bios

Approval of Minutes

November 8, 2023, minutes up for approval. “” motioned; “” seconded.

Action: Minutes approved as submitted

Establishment of Subcommittees and Meeting Dates:

Full committee meeting- Second Wednesday at 11am ET.

Subcommittee 1: (International Issues) Meeting- First Thursday 11am ET.
Members: Rebecca Lammers; Rob Foley; Stacy Cloyd; Steven Hall; Jihan Jude

Subcommittee 2 Meeting- First Thursday 2pm ET
Members: Tiffany Grayson; Jared La Lefevre; Steven Hoffman; Richard Bell;
Aissata Diaby

Outreach: Steven Hall (Vice Chair)
Screening Members: Lammers; Cloyd; Bell; and Foley
Quality (QR): Grayson; Cloyd
Internal Communications: Jihan Jude

2024 Project Committee Work

- Issue 65214-US Citizens Abroad with Retirement Income (Sub-1)
- Issue 66513-New Envelopes for Refund Checks (Sub-2)
- Issue 67239-Electronic Power of Attorneys for Overseas Taxpayers (Sub-2)
- Issue 71912-Prioritize Zero Tax Liability for International Taxpayers to Use Direct File by 2025 (Sub-1)

Action Items

Ross will do the following:

- Meeting Assessment
- Post November minutes
- Ross to send out TEAMS invite for the full and subcommittee meetings
- Ross to forward Project Proposals subcommittees
 - Sub.1 Issues 65214 and 71912
 - Sub. 2 Issues 66513 and 67239

Roundtable

Kurita thanked everyone for joining and is looking forward to a good year. Collins 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: April 12, 2024 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.