



**Special Projects
Taxpayer Advocacy Panel (TAP)
Monthly Meeting Minutes
Wednesday, March 11, 2021**

Designated Federal Officer(DFO)

- Terrie English Designated Federal Officer

Attendance

- | | | |
|-------------------------|-------------------|-----------------|
| • Michael Avery | San Juan, PR | Member |
| • Laurie Brock | Eugene, OR | Chair |
| • Gina Gray | Nichols Hills, OK | Member |
| • Ryan Groff | Beverly, MA | Vice-Chair |
| • Dorothy Havey | Belfast, ME | Member |
| • John Hughes | Memphis, TN | Member |
| • Matthew “Matt” Kinley | Long Beach, CA | Member (Absent) |
| • Robert “Bob” Moretti | Great Falls, MT | National Chair |
| • Brandon Smith | Bowie, MD | Member |
| • Laura Snyder | Paris, France | Member |
| • William “Bill” Vetter | Cypress, TX | Member |

Staff

- | | |
|--------------------------|--|
| • Kevin Brown | Administrative Assistant |
| • Terrie English | TAP Director |
| • Antoinette “Toni” Ross | TAP Program Analyst |
| • Conchata Holloway | TAP Program Analyst |
| • Dale Hawkins | Program Analyst, Wage & Investment (W&I) |
| • Michael Odom | Program Analyst, W&I |
| • Cedric Jeans | TAP Chief East |

Welcome Announcements/Comments/Acknowledgements

Terrie English welcomed all attendees and opened the meeting at 11:00am ET.

Roll Call

Quorum was met.

Members of the Public

None

National Office Report/DFO Report

English reminded the members of the All TAP quarterly meeting on March 18, 2021 at 2:30pm. The National Taxpayer Advocate (NTA), Erin Colins, the Executive Director of Communications, Stakeholder Liaison & Online Services (CSO), Maryclaire Ramsey and the Deputy Executive of CSO,



Sheila Andrews, will attend. The first Joint Committee (JC) meeting is March 25, 2021 at 1:30pm ET. English reported that the tax forums will be virtual again this year and TAP will have its own virtual room to be staffed by TAP members.

New members are encouraged to attend at least one JC meeting to see the flow of issues to the IRS. English welcomed William Vetter as a new member. Business cards have been ordered and will be sent out when we received them. The TAP 2020 Annual Report is being published and will go out when we receive them. Please update your profile on www.tapspace.org.

Minutes Approval

February 10, 2020. Michael Avery asked if TAP was following Federal Advisory Committee Act (FACA) guidelines regarding meeting order and rules. English confirmed TAP is in compliance with FACA meeting guidelines.

Action: Minutes approved as submitted.

- Request for Volunteers for the QR Team:
Laurie Brock (After April 15, 2021); Brandon Smith; and Michael Avery.

Outreach Report

- Activity Reports- Groff reported receiving 100% of the monthly reports. Groff offered his assistance to any members who need outreach ideas. Groff said social media and some professional environments are good options. Snyder said during the recruiting process and Groff added during tax season are good times for outreach. Smith met with the District of Columbia (DC) Taxpayer Advocate for outreach opportunities. (Smith's IRS LTA is James Leith). Groff speaks to his LTA on a quarterly basis. English mentioned the LTAs are required to reach out to TAP members. You can reach out to them if they have not contacted you. All of this should be accounted for on the Activity Reports, per Ross. Ross will help with introducing Vetter with his LTA. (Activity Reports are due on day 25 of each month.)
- TAP Newsletter- Send updates to Groff for newsletter. The TAP Newsletter is due on day 15 of each month.

Approval of IRS Responses

- Issue 41749- Not adopted: Snyder remarked that IRS control contractors used to deliver the mail outside the US. Online options are expected by 2023, per Ross. Response sent back to subcommittee, new recommendation to be considered.
- Issue 42967- Not Adopted, returned to subcommittee for reconsideration.
- Issue 42996- Are overseas TPs allowed to use Free File? Snyder said some of the requirements cause difficulties for this to be used as it may be

more complicated. Awalt said www.irs.gov is the easiest way to use this for overseas taxpayers.

- Issue 43054- TABLED
- Issue 47341- TABLED
- Issue 43807- TABLED
- Issue 41296- Quick Withdrawals of POAs (Issue is still with the IRS with holding date of 6/30/2023)- TABLED

Subcommittee 1 Report out

- Issue 44303- Form 9000 and LEP Schedule-Vetter reported, both form and schedule are on one page. We are inquiring about this with the IRS right now. We will send this to Tax Forms and Publications committee when it is ready to go to the IRS.

Approved: Committee agreed by consensus to move this to the Tax Forms and Publications committee when complete.

Subcommittee 2 Report out

- Project Referral for Issue 43819-New Online Tools Needed to Update Banking Information (Questions to be sent to the IRS SME)
- Project Referral for Issue 44253- IRS Tax Forms for Taxpayers who are Unable or Unwilling to Download and Print Forms (issue being worked by the subcommittee)

Screening Committee Report out

Snyder reported the committee reviewed 17 issues, 6 going to subcommittees. 4 to Subcommittee 1 and two to Subcommittee 2.

Action Items

Antoinette Ross will do the following:

- Submit February 2021 minutes to post to the FACA Database.
- The 4 tabled responses will be on next month's meeting agenda.
- Issues 41749 and Issue 42967 sent back to subcommittee for possible reconsideration. Recommendation 2 in 41749 may lead to a new issue for Special Projects.
- Introduce Vetter to Texas LTA.
- Forward the answer from IRS regarding Issue 42996- Are overseas taxpayers allow to use free file?

Roundtable

Veterans' Day meeting date to be discussed during the next meeting.

Closing

English closed the meeting at 12:00pm ET



Next Meeting: Thursday, April 8, 2021 at 11:00am ET

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