



**Special Projects
Taxpayer Advocacy Panel (TAP)
Monthly Meeting Minutes
Wednesday, April 8, 2021**

Designated Federal Officer (DFO)

- Cedric Jeans 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 (Absent) |
| • 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 (Absent) |
| • 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

Cedric Jeans welcomed all attendees and opened the meeting at 11:00am ET. Brock added the November meeting date change to the agenda.

Roll Call

Quorum was met.

Members of the Public

None

National Office Report/DFO Report

Jeans reported they are working with IT to fix issues with the announcement for the TAP recruitment period on www.usajobs.gov. Currently the announcement is open until May 14, 2021 but could be extended if necessary. A banner with the announcement has been added to www.tapspace.org as a reminder to members.



The TAP annual report has been printed and will be sent directly to member's homes. Jeans reminded the members that this report will also be sent to the Secretary of Treasury, the IRS Commissioner and to the National Taxpayer Advocate (NTA).

Minutes Approval

The next meeting date was corrected to April 8, 2021 on the March 11, 2021 minutes. Snyder motioned; Hughes seconded.

Action: Minutes approved as Admitted.

Outreach Report

- Activity Reports- Groff reported
- TAP Newsletter- Send updates to Groff for newsletter. The TAP Newsletter is due on day 25 of each month.

Subcommittee 1 Report out

New Project Referrals:

- 42690-Where to file instructions confusing

Vetter motioned; Moretti seconded

Action: Issue elevated to JC after Quality Review (QR)

- 43798-Online system for abroad taxpayers

Vetter motioned; Moretti seconded

Action: Issue elevated to JC after QR

- 43867-Impossible to get ITIN from abroad

Vetter motioned; Groff seconded.

Action: Issue elevated to JC after QR

- 42162-Delay in issuing refunds with EIN/Child Credit- **Dropped**
- 43462-Financial Report Form (FBAR) Too frequent changes- **Sent to Parking Lot for more research.**

Subcommittee 2 Report out

- Project Referral for Issue 43799-EIN Application- **Dropped**
- Project Referral for Issue 43619-Tax Calculator- **Brock working**
- Project Referral for Issue 43819-New Online Tools Needed to Update Banking Information- **Avery working**
- Project proposal for Issue 44253- IRS Tax Forms for Taxpayers who are Unable or Unwilling to Download and Print Forms- **Havey working, will be on May's agenda**

Approval of IRS Responses

- Issue 42996-IRS Not Respecting Mandatory Use of Registered Mail- **Rebuttal (move to subcommittee 1)**
- Issue 43054-IRS Accounts Made Dysfunctional for Non-Resident Americans (**Hold until 7/15/2021**)



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

IRS Response- Tabled until May meeting

- Issue 43741- No Electronic Filing for Foreign Spouse
- Issue 43807- Facilitating Payments to IRS by Overseas Taxpayers

Screening Committee Report out

- Snyder reported that the Screening Committee screened 23 issues:
 - Subcommittee 1 received one new issue created by analyst that encompassed five like issues
 - Subcommittee 2 received four new issues
 - Three issues were associated with existing issues
 - Eight issues were dropped as they were not within TAP's scope or personal issues
 - Two issues were sent to the Parking Lot for more information
 - One issue was referred to another project Committee

Action Items

Antoinette Ross will do the following:

- Submit March 2021 minutes to post to www.improveirs.org.
- Forward Project Referrals to the subcommittees from Screening Committee.
- Send out new invite for the November 11, 2021 meeting to Wednesday, November 10, 2021.
- Update SAMS with Issue information

Roundtable

N/A

Closing

Jeans closed the meeting at 12:01pm ET

Next Meeting: Thursday, May 13, 2021 at 11:00am ET

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