



**Special Projects
Taxpayer Advocacy Panel (TAP)
Monthly Meeting Minutes
Thursday, June 10, 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 |
| • 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 |
| • Debra “Debbie” Awalt | Program Analyst, Wage & Investment (W&I) |
| • Dale Hawkins | Program Analyst W&I |
| • Leslie Henley | Program Analyst W&I |
| • Michael Odom | Program Analyst, W&I |

Welcome Announcements/Comments/Acknowledgements

Cedric Jeans welcomed all attendees and opened the meeting at 11:00am ET.

Roll Call

Quorum was met.

Members of the Public

None

Chair Report

Brock reported there will be training for the Tax Forums on July 13, 2021 given by Fred Smith. On June 23, 2021, the National Taxpayer Advocate will submit her June objectives to Congress. Please review the referral from Moretti by June 20, 2021 for any corrections or additions. Members are being solicited to be part of the interview process for the TAP recruitment season. The focus group for



underserved Native Americans was included in the last newsletter. Brock thanked all who are working on these efforts.

National Office Report

Terrie English welcomed everyone to the call. The Recruitment season has closed, and we will solicit members for the interview process. The second quarter All TAP meeting will be on June 17, 2021 at 1pm ET, with Kenneth Corbin, Commissioner of W&I as the speaker.

There will be a focus group for military taxpayers soon to come. This is for anyone with any military experience: family members of the military, military contractors current or former military members, anyone who has dealt with the military are asked to attend. English made the committee aware of the work from home order has not been lifted and the travel restriction is still in place. English will keep the committee abreast of any changes that are made to this order.

DFO Report

Jeans thanked the members for their volunteer in the recruitment process. TAP has eight states they are trying to fill member positions, and your efforts will make the process easier.

Minutes Approval

May 13, 2021 minutes- Hughes motioned; Groff seconded.

Action: Minutes approved as submitted.

Outreach Report

Groff reported on the Fresno, CA tax processing site. Please share post on the closing of the Fresno Processing Center via social media from Internal communications (ICC) after June 18, 2021. Groff thanked the committee for submitting their Activity Reports and that Special Projects had a 100% participation rate for the month of May. Groff thanked those who submitted stories for the newsletter. Groff encouraged members to continue to share stories for the newsletter. The ICC needs representation from anyone who wants attend. Let Ross and Groff know if you can attend this meeting.

Subcommittee 1 Report out

Vetter reported:

- Issue **48551**-Unequal Treatment of International Taxpayers

Brock spoke of making it easy for international taxpayers to be able to stay compliant and file their taxes without so many hurdles to deal with.

Sent back to subcommittee for further review

- Rebuttal for Issue **42967**-Simplified Reporting for Overseas Taxpayers:

The committee is still working on making this rebuttal a better product to send to the IRS. Large Business and International (LB&I) will be asked for assistance to further this rebuttal for this project.

Subcommittee 2 Report out

Brock reported:

- Project Issue **44253**- IRS Tax Forms for Taxpayers who are Unable or Unwilling to Download and Print Forms (Forwarded to SP QR; AA; and SA for review) **Being reviewed now**
- TAP Referral for Issue **49525**-Taxpayer Online Account with IRS- **Being worked.**
- TAP Referral for Issue **43819**-New Online Tools Needed to Update Banking Information- **Being worked.**

Approval of IRS Responses

- Issue **43741**-No Electronic Filing for Foreign Spouse

There was a discussion about how this referral seeks to allow more international taxpayers to file electronically, this is still being worked.

Updated Information:

Issue **43808**-Facilitating Payments from the IRS to Overseas Taxpayers

Ross reported this issue has been Referred to the Chief Financial office of the accounting department and we are awaiting a response now.

Screening Committee Report out

Hughes reported that Issue **48702**- Please Eliminate Third Parties Requirement was the only issue that was referred to a subcommittee for review from the June Screening Report.

Action Items

- Submit May 2021 minutes to post to www.improveirs.org.
- Groff will send the email regarding ICC request to share via social media.
- Vetter will send Spreadsheet on issues associated with Issue **48551** for Ross.
- Set meeting with Vetter (Ross will send rebuttal Issue **42967** to members to look over and address any concerns
- Request Subject Matter Expert (SME) from Large Business & International (LB&I) to Odom for Sub. 1 Issue **42967** rebuttal.

Closing

Jeans closed the meeting at 12:01pm ET

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

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