



**Special Projects  
Taxpayer Advocacy Panel (TAP)  
Monthly Meeting Minutes  
Wednesday, May 13, 2021**

**Designated Federal Officer (DFO)**

- Cedric Jeans Designated Federal Officer

**Attendance**

- |                         |                   |                 |
|-------------------------|-------------------|-----------------|
| • Michael Avery         | San Juan, PR      | Member (Absent) |
| • Laurie Brock          | Eugene, OR        | Chair           |
| • Gina Gray             | Nichols Hills, OK | Member (Absent) |
| • 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          |
| • 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                                       |
| • Robert Rosalia         | TAP Program Analyst                                       |
| • Debra “Debbie” Awalt   | Program Analyst, Wage & Investment (W&I)                  |
| • Dale Hawkins           | Program Analyst W&I                                       |
| • Leslie Henley          | Program Analyst W&I                                       |
| • Cindy Jones            | Supervisor W&I  |
| • Michael Odom           | Program Analyst, W&I                                      |
| • Brian Foltz            | Treasury Inspector General for Tax Administration (TIGTA) |
| • Catherine Sykes        | TIGTA   |

**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

### **National Office Report**

Terrie English welcomed everyone to the call.

- File your returns by May 17, 2021.
- Focus group for underserved Native Americans, you are invited.
- All TAP Quarterly meeting will be June 17, 2021 via Zoom 1:00pm ET.
- Joint Committee meeting is May 27, 2021 1:30pm.
- There is a request for panel members who serve or have served in the military for a military focus group.
- Recruitment season has been extended to June 1, 2021.
- Tax Forum preparation has started, volunteers are being solicited. Respond early to avoid missing this opportunity.
- This can be used as an outreach topic.
- Badges were sent out, contact your analyst if you have not been received yours.
- Business cards are going out, but there were delays with half of the list.

### **DFO Report**

IRS is sending news releases about tax changes that may impact some of our projects. Go to [www.irs.gov](http://www.irs.gov) and subscribe to receive them and stay informed.

### **Minutes Approval**

April 8, 2021 minutes- Snyder motioned; Hughes seconded.

**Action: Minutes approved as submitted.**

### **Outreach Report**

- Activity Reports- Groff reported fairly good job with a few missing. They are due on the twenty-fifth of each month. This includes any and all TAP activity for each month.
- Highest number of outreach events, 13, this year.
- TAP Newsletter- Send updates to Groff for newsletter. The TAP Newsletter is due on day 25 of each month.
- Internal Communications Committee (ICC) Needs representation.

### **Subcommittee 1 Report out**

The below issues were forwarded to Special Projects Quality Review (QR) Team, Systemic Advocacy (SA) and TAS's Attorney Advisors (AA).

Vetter reported:

- QR Review has been completed; SA and AA (reviews not completed yet)
  - 42690-Where to File Instructions are Confusing
  - 43798-Online system for Taxpayers Abroad
  - 43867-Impossible to get ITIN

Snyder motioned; Groff seconded

**Action: Elevated to JC for consideration after SA and AA's review.**

- Project Referrals:



48551-The IRS should bring the service levels standards for international taxpayers. This issue still requires work so will be tabled until next month.

### **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)- **This is tabled until next month.**
- TAP Referral for Issue **43619**-Tax Calculator- **Still being worked.**
- TAP Referral for Issue **43819**-New Online Tools Needed to Update Banking Information- **Still being worked.**
- TAP Project Proposal for Issue **48336**-Form 8621 For Reporting PFIC (Parking Lot)- **No change.**
- TAP Project Proposal for Issue **48461**-Involuntary Assignment of IP PIN (Parking Lot)- **No change.**

### **Approval of IRS Responses**

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

The committee discussed the consistent issues this referral seeks to resolve 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**

Next Screening Meeting will be May 20, 2021.

### **Action Items**

Antoinette Ross will do the following:

- Submit April 2021 minutes to post to [www.improveirs.org](http://www.improveirs.org).
- Ross will share updates with the committee on Issue 43808.
- Send 3 issues to JC: 42690; 43798; 43867.
- Ross will let committee know after Issue 44253 returns from QR review.

### **Roundtable**

N/A

### **Closing**

Jeans closed the meeting at 11:59pm ET.

**Next Meeting: Thursday, June 10, 2021 at 11:00am ET**

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