



**Special Projects
Taxpayer Advocacy Panel (TAP)
Monthly Meeting Minutes
Thursday, July 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 (Absent) |
| • Ryan Groff | Beverly, MA | Vice-Chair |
| • Dorothy Havey | Belfast, ME | Member |
| • John Hughes | Memphis, TN | Member |
| • 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 |
| • Robert Rosalia | TAP Program Analyst |
| • Fred Smith | TAP Program Analyst |
| • Kudiratu Usman-Olugunna | TAP Program Analyst |
| • Debra “Debbie” Awalt | Program Analyst, Wage & Investment (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: The training session for the tax forums will take place on July 13, 2021.



National Office Report

Terrie English reported the following reminders:

Joint Committee (JC) meeting, July 22, 2021 at 1:30pm ET.

Military Focus group meeting, July 15, 2021 at 12:00pm ET.

Homeless focus group coming soon, there is no date currently.

DFO Report

Jeans reported there will be about 30 live stream webinars between July 20, 2021 and August 19, 2021 for those interested in Continuing Professional Education (CPE) credits. We are in the process of doing interviews and we thank the members helping with this process. We are currently planning for the JC planning meeting the week of August 23, 2021. Please submit any ideas to Brock regarding this. Jeans recommended that members review the National Taxpayer Advocate's (NTA's) June Report to Congress.

Minutes Approval

June 10, 2021 minutes- Hughes motioned; Avery seconded.

Action: Minutes approved as submitted.

Outreach Report

Groff reported:

- Activity Reports- 90 percent completion rate.
- TAP Newsletter (Future Newsletter Articles)
- Early IRS Advanced Child Tax Credit Marketing Access

These credits will go out on the middle of this month distributing up to 50 percent through December of this year with the other half after taxes are filed next year.

Groff forwarded this information via email to the committee.

- ICC Meeting Updates:
 - ICC is still in need of a rep.
 - www.TAPSpace.org User Guide Update happening right now.
 - The ICC is looking into getting a Facebook Page v. Facebook Group (the ICC has received permission to have a Facebook Page and there is a need for Admins for the page).
 - Groff is looking for help with the newsletter articles which can be sent to him for this monthly project.

Subcommittee 1 Report out

Vetter reported:

- Rebuttal for Issue 42967-Simplified Reporting for Overseas Taxpayers
Susan Simon, Director of Customer Assistance Relationship & Education (CARE), suggested we submit our response in a better way for this referral to be more effective. Vetter motioned; Havey seconded

Action: Returned to Subcommittee 1

- **Issue 48551**-Unequal Treatment of International Taxpayers
Addendum added to the referral for clarity. Vetter motioned; Brock seconded.

Action: Elevated to JC for consideration as amended.

Subcommittee 2 Report Out

Avery reported:

- Project Issue 44253- IRS Tax Forms for Taxpayers who are Unable or Unwilling to Download and Print Forms (Issue to be sent to the JC for addition to the JC Agenda). This referral also seeks to improve the delivery of forms and publications in a timely manner. Forms, publications, and instructions added to the referral. Avery motioned; Groff seconded.

Action: Elevated to JC for consideration as amended

- TAP Referral for Issue 49525-Taxpayer Online Account with IRS This referral is supported by the Taxpayer First Act which has been referenced by the NTA's June Report to Congress. Referral updated for clarity. Awalt added this referral seeks to increase the online accounts without discontinuing the other channels such as the telephone lines or the walk-in services. Groff motioned: Snyder seconded.

Action: Elevated to JC for consideration as amended

Approval of IRS Responses

Issue 42960: IRS Instructions on Where to File Taxes

Implemented June 17, 2021. Brock motioned: Snyder seconded.

Action: Response accepted

Action Items

Antoinette Ross will do the following:

- Submit June 2021 minutes to post to www.improveirs.org
- Issue 42967 returned to Subcommittee 1
- Issue 48551 elevated to JC
- Issue 44253 elevated to JC
- Issue 49525 elevated to JC
- Response to Issue 42960 Accepted

Closing

Jeans closed the meeting at 11:58pm ET

Next Meeting: Thursday, August 12, 2021 at 11:00am ET

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