



**Special Projects
Taxpayer Advocacy Panel (TAP)
Monthly Meeting Minutes
Thursday, October 14, 2021**

Designated Federal Officer (DFO)

- Robert Rosalia TAP Program Analyst

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 |
| • 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

- | | |
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| • Kevin Brown | Administrative Assistant |
| • Terrie English | TAP Director |
| • James Bellinger IV | Program Analyst, Wage & Investment (W&I) |

Welcome Announcements/Comments/Acknowledgements

Robert Rosalia welcomed all attendees and opened the meeting at 11:00am ET.

Roll Call

Quorum was met.

Members of the Public

None

Chair Report

Brock welcomed everyone to the call and reviewed the agenda.

National Office Report

English reported that we will be sending an invite for the graduation for the third-year members shortly as a way to honor their commitments for the last three years. English said we will have two more focus group meetings, one of which will be on October 20, 2021 and more information will be sent out soon.

DFO Report

Rosalia asked for members to assist Brock with the TAP Annual Report to Congress write ups, proofreading and editing. Rosalia reminded the returning



members to continue doing outreach after the TAP year end in November. Rosalia asked members to share any outreach events that can be repeated so they can be added to the outreach data base for future TAP members in the years to come.

The National Taxpayer Advocate (NTA) and Systemic Advocacy (SA) spoke about Most Serious Problems (MSPs) how TAP could assist them with issues. They may reach out to us for focus groups and Ad Hoc committees in the very near future. Yesterday we had the Chair and Vice Chair info session for TAP leadership for next year. Nominations are due on October 19, 2021.

Chair Report Out

- Annual Report

Brock is looking for write-ups for the following issues:

42690- Instructions on Where to File

43798- Online Systems for Taxpayer Abroad

43867- Impossible to get an ITIN

49525- Taxpayer Online Accounts

43808- Facilitating Payments from the IRS to Overseas Taxpayers

48551- Unequal Treatment of International Taxpayers

48702- Eliminate Third Party as a Necessity for Tax Preparations

These are due on October 29, 2021.

Minutes Approval

September 9, 2021 minutes- Tabled to next month

Outreach Report

Groff reported 60 percent of the activity reports received. There was a three percent increase in outreach in total hours, but there was a drop from August to September in total outreach. Groff suggested keeping up with virtual outreach as it will remain a big part of our outreach efforts. Please reach out to your Local Taxpayer Advocates (LTA). We need assistance writing reports for the newsletter and we need an Internal Communications committee representative. Brock reminded the committee the hours are added up for third-year members and could lead to Presidential Awards-Gold, Silver or Bronze.

Subcommittee 1 Report out

Vetter reported:

Proposal for Issue **50450-**Improve "Where's My Refund" on IRS.gov

This proposal seeks to give taxpayers specifically a time and date expectation for the refunds to help taxpayers. Three members of subcommittee 1 approved this issue to be voted on today. Vetter motioned; Moretti seconded.

Action: Issue elevated to the JC for consideration, contingent upon System Advocacy and Attorney Advisors (SA/AA) Feedback (QR already conducted)

Subcommittee 2 Report Out

Brock and Avery reported on Project Referrals:

- Proposal for Issue **49802**-Refund Payments Regarding Divorced Taxpayers

This referral seeks to divide refund payments to individuals in situations with joint payments for refunds and stimulus payments. Groff added his opposition to Visa card being sent out instead of checks or electronic payments allowing for more options for payments than just spending. Snyder pointed out that cards are easier for overseas taxpayers. Brocks suggested separate payments or cards. Since this issue is the only one still being worked on by the full committee, Rosalia suggested that both Subcommittee 1 and 2 conjointly.

This project proposal will be worked into a project by both Subcommittees to presented next month.

Screening Report Out

Snyder reported screening 10 items with only two relevant to TAP. Both issues were related to issues already being addressed. One issue will be linked to issue 49802 and the other will be linked to the online account issue currently being worked.

Roundtable

Brock spoke about working on the Annual Report. Moretti spoke about the Annual Veterans Standdown which was an outreach event he attended this month. Moretti spoke of being included in the Montana State university alumni magazine about his involvement with TAP. This magazine has a subscribership of 75,000 and gave TAP great exposure. Brock spoke of an outreach with 185 people in attendance as she spoke about TAP. Brock will share these on the Facebook page.

Action Items

Robert Rosalia:

- September minutes tabled to next month.
- Issue 50450 elevated to JC pending SA/AA feedback.
- Issue 49802 will be worked not a project by both subcommittees.

Closing

Brock and Groff thanked everyone for joining the meeting. Rosalia closed the meeting at 11:55pm ET.

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

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