



**Special Projects
Taxpayer Advocacy Panel (TAP)
Monthly Meeting Minutes
Wednesday, November 10, 2021**

Designated Federal Officer (DFO)

- Cedric Jeans TAP East Chief

Attendance

- | | | |
|-------------------------|-------------------|-----------------|
| • Michael Avery | San Juan, PR | Member |
| • Laurie Brock | Eugene, OR | Chair |
| • Gina Gray | Nichols Hills, OK | Member |
| • 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

- | | |
|--------------------------|--|
| • Kevin Brown | Administrative Assistant |
| • Terrie English | TAP Director |
| • Robert Rosalia | Program Analyst |
| • Antoinette “Toni” Ross | Program Analyst |
| • James Bellinger IV | Program Analyst, Wage & Investment (W&I) |
| • Cynthia “Cindy” Jones | Supervisor 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

National Office Report

English wished a Happy Veterans Day to all those who served. English sent a special thanks for all the service the committee has did serving the public for their tax needs this year. This has allowed the taxpayers voice to be heard. English reminded the committee of the graduation ceremony on November 19, 2021 at 1:00pm ET. English encouraged members to share or say something kind about those who may have impacted them to the committee analyst for the ceremony.



English reminded the committee the last Joint Committee (JC) meeting for this year would be on November 18, 2021 at 1:30pm ET. You are able to sit on this meeting and it will be part of your TAP hours that should be included on your activity reports. The last day to vote for next year's leadership was midnight last night for the next Chair and Vice Chair. Results are being tallied at this time. English once again thanked the committee for all of their hard work.

Minutes Approval

September 9, 2021 minutes- Snyder motioned; Hughes seconded.

October 14, 2021 minutes- Snyder motioned; Hughes seconded.

Action: September and October minutes approved as submitted.

Outreach Report

Groff thanked everyone for their diligence this year with the reports.

Please share reflections about your work with TAP for the newsletter to Groff for the newsletter. No Internal Communications Committee (ICC) report.

Please turn your activity reports in early for the end of the year.

Chair Report

Brock reported getting Issue **49802**- Refund Payments Regarding Divorced Taxpayers, approved by the JC and elevated to the IRS. Brock spoke about the challenges with no travel; mail-in returns taking longer to be processed; shutdowns; and people not having access to everything they need to get their work done. We came through in an amazing manner despite all the odds. Brock highlighted we have always made quorum and how we got a lot of work done.

- Annual Report- tabled until the end of the meeting.

Brock commented on retiring members:

Bob Moretti- Brock thanked Moretti for all his hard work and for leading as the TAP National Chair.

Gina Gray- Brock thanked for all of her diligence and hard work.

John Hughes- Brock thanked for all of his work.

Ryan Groff- Brock thanked for prodding us on the activity reports and for working on the ICC newsletter.

Laura Snyder- Brock thanked her for keeping our focus on international taxpayer challenges.

Brock honored Dorothy Havey who was an active, helpful, and hard-working member before she left the TAP.

Brock reminded the committee that during the graduation there are awards based on the hours you have on your activity reports. Awards based on hours on the activity report are Gold, Silver and Bronze. Please finish them and turn them



in to Groff. Brock said expect possible opening new meetings in March maybe. Next summer the JC planning and tax forums may be in person next year.

DFO Report

None

Subcommittee 1 Report out

Brock reported:

- Project Referrals: Referral for Issue **49802** - Refund Payments Regarding Divorced Taxpayers

The purpose was to avoid issues when checks are sent to couples who want to split the money and have two separate checks. This allows the money to be available quicker. Prepaid cards could be an option to be requested as a check box on the Form 1040. Vetter suggested format changes and points of clarity on the referral to be accurate and more helpful to the referral. Snyder offered and correction to the verbiage in the referral. Vetter motioned; Brock seconded.

Action: Issue elevated to the JC for consideration, pending Quality Review (QR)

Screening Report Out

Snyder reported screening approximately 190 issues with 10 to 15 percent addressed in a referral or to committees to be addressed. Many issues not pertinent to TAP some duplicated issues and collected in a single referral. Snyder is happy to be part of such an important committee to be on and enjoyed the opportunity.

Snyder asked about outstanding issues 48551 Unequal Treatment of International Taxpayers and 43808 which was submitted November 2020. Snyder wants to know what the IRS responds with. Snyder also inquired about Issue 43054 IRS Accounts Dysfunctional for International Taxpayers which was under consideration with follow-up that was supposed to be made on July 15, 2021. Jeans is working to get responses for these issues and will send a response to retired members about them. Michael Avery inquired about what happens to regulatory or legislative issues. Jeans said they are reported up to Systemic Advocacy (SA) who addresses them if they meet their acceptance criteria. Avery asked about those issues that are not accepted, Jeans reported that the submitter is responded to about if SA accepts the issues or not. Avery asked about the guideline to accepting or not accepting issues. Jeans suggested the TAP handbook as a source of this part of TAP.

Snyder highlighted John Hughes as a very important part of the screening committee along with Moretti, Brock and Havey. The committee indicated that Ross was also very helpful this year.

Roundtable

Brock asked for input by the Annual Report by the committee for taxpayer impact statements on issues presented to the IRS this year.



Issue 42690 IRS Instructions on where to file taxes- Yes
Issue 43798 Online System for Taxpayers Abroad- Yes cost and time.
Issue 43867 Impossible to get an Individual Tax ID Number (ITIN) – important and need to be worked on to file taxes.
Issue 49525 Expanded TP online accounts with the IRS- They have started working on it already should be the impact statement.
Issue 48551 Unequal Treatment of International Taxpayers. Fixing any one of these issues would be help but ignoring all will not help filing and a pattern of neglect.
Issue 48702- Insure Taxpayer Security When Using the IRS Free File Program- Getting more people to do free filing for accuracy and speed.

Action Items

Toni Ross will do the following:

- September and October minutes tabled to next month.
- Issue 49802 elevated to JC pending QR.

Closing

Brock and Groff thanked everyone for working so hard this year. Jeans thanked everyone especially the retiring members for all they contributed to the TAP. We hope to reconvene somewhere around the end of January. We will keep the committee aware of any changes especially the possibility of travel next year. Thanked the IRS for being a great help throughout this year. Jeans closed the meeting at 12:02pm ET.

Next Meeting: TBD

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