



**Special Projects Full Meeting
Taxpayer Advocacy Panel (TAP)
Monthly Meeting Minutes
Wednesday, April 13, 2022**

Designated Federal Officer (DFO)

- Cedric Jeans TAP East Chief

Attendance

- | | | |
|-------------------|-----------------------|-----------------|
| • Michael Avery | San Juan, PR | Member |
| • Laurie Brock | Eugene, OR | Chair |
| • Marla Brown | Memphis, TN | Member (Absent) |
| • Aisha Earle | Alpharetta, GA | Member (Absent) |
| • Kimberly Fox | Panama City, FL | Member |
| • Rita Green | Memphis, TN | Member |
| • Susan LaBudde | Fox Point, WI | Member |
| • Rebecca Lammers | International/ London | Member |
| • CJ Mills | Glenside, PA | Member |
| • Donna Patterson | Bothell, WA | Vice-Chair |
| • Brandon Smith | Bowie, MD | Member (Absent) |
| • Rene Tiongquico | Washington, D.C. | 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 |
| • Schenita Thornton | W&I Program Analyst |
| • Leslie Henley | W&I Program Analyst |

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

Welcome/Announcements/Comments/Acknowledgement of Citizens

Brock welcomed everyone to the call. Patterson welcome everyone to the call and indicated she would speak more about outreach later.

National Office Report

English asked the committee to remind people that this year's filing deadline is April 18, 2022. We will be moving to MS TEAMS; we are currently working out the bugs. Please be patient as we work through this. English also indicated there are a lot of restrictions with the new software that we will have to work through.

DFO Report

Jeans told the committee that a survey will be sent out to determine the technical capabilities for our members, so we know where to focus our aid during this transition. Some of the questions will be what browser you use, are you able to download software to them or what devices do you use to access these systems that we will be working with this year. This will allow us to see who may need assistance. We are sending invites to www.tapspace.org for our new members to set up your profile and gain access to the site to start doing TAP work. Please turn in your volunteer agreement form so you are able have access to information to do TAP work.

Minutes Approval

April 1, 2022 minutes- Brock motioned; Tiongquico seconded.

Action: April 1, 2022 minutes approved as corrected.

Vice Chair Outreach Report Out:

- Outreach Meeting is April 21, 2022, at 3:00 p.m. EST.
- Activity Reports- This should be an easy transition for the returning members. Patterson has a PowerPoint to assist members with this.
- TAP Newsletter (Future Newsletter Articles) Articles due to Vice Chair by April 20, 2022.
- ICC Meeting Updates-ICC Meeting will be held April 19, 2022 at 3:00 p.m. EST.

Chair Report Out

IRS Responses:

- **Issue 43054-** IRS Accounts Made Dysfunctional for Non-Resident Americans- Still under consideration

Lammers indicated this issue may have been improved starting in November or December of last year where some international taxpayers are able to set up an account. Some taxpayers are still having issues because of the requirements to set these accounts up. We need to review this issue to see if it is still an issue or if it needs to be rethought. Mills motioned to accept response; Fox seconded.

Action: Response accepted

- Issue 43808-Facilitating Payments to IRS by Overseas Taxpayers

The issue remains "Under Consideration by the IRS"



The committee discussed options for taxpayers overseas such as opening US bank accounts to resolve this issue. Opening up US accounts overseas pose a lot of barriers, per Lammers. This issue will be set aside until next month allowing for research. Subcommittee 1 will take this issue.

- Issue 43867-Impossible to Get an ITIN

Mills motioned to accept; Patterson seconded. Michael Avery opposed accepting this response because taxpayers are still dealing with this problem.

Action: Response accepted

This issue will be reviewed to see if there is a new issue that can be developed by the committee. Subcommittee 2 will do this research. Jeans stated for the record, majority consensus rules, and if there are any minority objections, the Chair has the authority to send down to subcommittee for them to consider a new project only.

The remaining issues will be tabled until next month.

- Issue 43798-Online Tax System for Taxpayers Abroad
- Issue 43741-No Electronic Filing for Foreign Spouse
- Issue 49525-Expand Taxpayer Online Account with the IRS
- Issue 49802-Refund Payments to Couples
- Issue 50545-Improve Where My Refund on IRS.gov

New Project Proposals

Subcommittee 1: Fox Reported out

- Project Referral Issue 51241-Form 1040SS-US Self-Employment Tax Return

This issue is still being researched.

Subcommittee 2: Patterson Reported Out

- Project Referral Issue 51693—Estimated Tax Payments

Patterson explained this issue seeks to review the issues proposed so that taxpayers can make these estimates for their own social security numbers to simplify this being reconciled easier.

Screening Report Out:

They screened 23 of 97 issues. There was an issue from the Parking Lot concerning availability of forms and publications that is still being researched. 49616 Tax Practitioner Contact Information Spoken Publicly. One issue is what information should a taxpayer have to divulge social security number in public. The other issue is coming up with a new error code pertaining to the Form 1095-A. Issue 51445 Living Abroad is Unfair which has to do with foreign bank accounts. The final issue is Form 843 Claims for Refunds. These five remain in the Parking Lot for further research.



There were several issues that we did not take on for various reasons such as legislative and other issues that TAP cannot address. There is an issue we will refer to the Taxpayer Experience office. There is a connected to Issue 51760 concerning Online Payment Centers.

The next Screening Committee Meeting will be held April 20, 2022, at 10:30 a.m. EST.

Action Items

Toni Ross will do the following:

- Forward April 1, 2022 minutes to be posted
- Get www.tapspace.org user guide from Ross if needed
- Get members access to www.tapspace.org
- Sub. 1 43808, 43867
- Sub. 2 43807
- Accepted 43058, 43867
- 5 responses tabled until next month
- Issue 51824 Sub. 1; Issue 50630 Sub. 2

Chair or Vice Chair of SP Committee Closing Comment

Brock and Patterson thanked everyone for joining the meeting.

Closing

Brock thanked everyone for a great productive meeting. Patterson thanked everyone for the meeting. Meeting closed at 12:02pm ET.

Next Meeting: May 11, 2022, at 11:00am ET

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