



**Special Projects
Taxpayer Advocacy Panel (TAP)
Monthly Meeting Minutes
Wednesday, May 11, 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 (Absent) |
| • Rebecca Lammers | International/ London | Member (Absent) |
| • CJ Mills | Glenside, PA | Member |
| • Donna Patterson | Bothell, WA | Vice-Chair |
| • Rene Tiongquico | Washington, D.C. | Member |
| • Martha Lewis | Visitor | TAP National Chair |

Staff

- | | |
|-----------------------|--|
| • Kevin Brown | Administrative Assistant |
| • Terrie English | TAP Director |
| • Rosalind Matherne | TAP Program Analyst |
| • Robert Rosalia | TAP Program Analyst |
| • Michael "Mike" Odom | Program Analyst Wage & Investments (W&I) |
| • Schenita Thornton | 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 welcomed everyone to the call and indicated she looked forward to hearing report outs for activities today.

National Office Report

English reported the Tax Forums will be held virtually from July 19, 2022, through August 18, 2022, this year. Please contact your analyst or the outreach analyst if you would like to man this virtual booth. English indicated that the recruitment process for the 2023 year has started. Those who would like to be part of the interview process can let your analyst know. English also explained that this process is almost a year long. This would explain why it takes such a long time for new members to be notified if they are selected. TAP members can use this information should someone ask them why it is taking so long for them to be a part of TAP.

Interviews for 2023 TAP panel will be starting soon. English reminded the committee that the selection process is long and has a lot of different parts to it. This can be shared with anyone concerned with not being selected to the TAP for some time after a person has applied. English indicated members can learn a lot participating in this process. The business cards will be sent out soon. Returning members should let your analyst know if you need more cards.

DFO Report

Jeans suggested subscribing to IRS news releases to help with your research for TAP. This may help keep us informed on what the IRS is already working on.

Minutes Approval

March minutes- Brock motioned; Mills seconded.

Action: April minutes approved as corrected.

Outreach Report:

- Report out from the Outreach Meeting

Patterson reported the first Outreach Committee meeting was on April 21, 2022. During this call there was refresher training on www.tapspace.org and how to use the automatic activity report on the site.

- Activity Reports

Patterson will be sending a reminder email each Friday at 10:00am ET with a reminder to update and input your activity reports. This year each Vice-Chair will receive a special initiative for outreach to bring back to their committees. Those initiatives will be given out at the next meeting.

- TAP Newsletter (Future Newsletter Articles)

Patterson asked that the newsletter articles be turned in by May 18, 2022, for this month's newsletter.

Chair Report Out

IRS Responses:

Lammers sent an email response this Monday concerning the responses. Brock shared the responses with the committee.

- **Issue 43807- Non-US Banks Processing US Checks**

This issue will recommend the IRS list third-party international transfer options on their website to help people save on transfer fees or get the best exchange rates. These new suggestions may turn into a new issue as the original issue may have been resolved already. Mills moved to accept this response and then submit a new recommendation for the IRS to supply the resources. Avery seconded.

Action: Response accepted, (new issue pending)

- **Issue 43798- Online Tax System for Taxpayers Abroad**

In her written response, Lammers asked why this can't be done without a US based phone number. Brock indicated that a Subject Matter Expert (SME) will be requested for this research. Odom will assist with this request. This issue will be sent back the subcommittee.

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

In her written response, Lammers reviewed the free filer program and saw that They are now allowing you to write NRA in the box for the spouse's social security number or Individual Taxpayer Identification Numbers (ITIN)s for free filer programs. Therefore, Lammers' recommended accepting this response. Brock motioned; Tiongquico seconded.

Action: Response accepted by committee

- **Issue 49525- Expand Taxpayer Online Account with the IRS**

In her written response, Lammers shared that a number of international taxpayers could not make the phone call using the toll-free number listed from at least three countries. This was specifically in ID 2102 of the recommendation. Because of this fact, more research is required to find out why these countries are reporting not being able to use this toll-free number. Further research will be conducted by the subcommittee for a possible rebuttal to this response. In addition, this issue may seek a Voice over Internet Protocol (VOIP) phone solution to allow taxpayers to call internationally.

- **Issue 48702- Ensure Taxpayer Security When Using the IRS Free File Program**

Because this are changing so fast this may not be an issue now. Mills motioned; Fox seconded. This issue is being reviewed by the subcommittee for a potential rebuttal.

- **Issue 49802-Refund Payments to Couples**

This issue is being reviewed by the subcommittee for a potential rebuttal.



- **Issue 50545-Improve Where My Refund on IRS.gov**

ID 2094 Already resolved- this response will be accepted.

ID 2095- This recommendation seeks to link the pocket guide to the transaction codes that tells what the lines on an IRS transcript means. The IRS response indicated they don't want to link it because it's confusing, and the meanings of the codes right next to them.

Action: Mills motioned to rebut the IRS response; Patterson seconded

Subcommittee 1: Report out

Fox reported:

- Project Proposal Issue 51241-Form 1040-SS-U.S. Self-Employment Tax Return
- Project Proposal Issue 51824—Estate and Gift Tax Filing
- Issue 43808 (IRS Response Review)

We are expediting responses for the committee to review hopefully next month.

Subcommittee 2: Report Out

Patterson reported

- Project Referral Issue 51693—Estimated Tax Payments

Should be ready for next month.

- Project Proposal Issue 50630—IRS Should Provide Tax Filing Software to Taxpayers

Rejected this issue. We will be attempting to make this software a little more visible. That is going to be our request.

- Issue 43867 (IRS Response Accepted by Full Committee-Review for maybe new issues)

This is outside of IRS jurisdiction and needs further review and discussion.

Screening Report Out:

Mills reported screening 26 issues. One issue was transferred to the Tax Forms and Publications committee; eight were placed in the parking lot for follow-up; 17 were dropped because they were either legislative or taxpayer specific.

Action Items

Toni Ross will do the following:

- April minutes posted.
- Issue 43807 accepted and close.
- Issue 43798 getting more clarity and information before deciding.
- Issue 43741 accepted and close.
- Issue 49525 rebuttal being worked.
- Issue 48702 rebuttal being worked.



- 49802; 50545 to be dispositioned later.
- 50630 dropped.

Roundtable

Avery asked if there were any referrals not yet reviewed? Mills indicated there are about 13 left and they should be reviewed next month. Jeans suggested including these in next month's pre-reads.

Chair or Vice Chair of SP Committee Closing Comment

Brock reminded members to consider being part of the tax forum. Patterson asked for a volunteer for next newsletter and Tiongquico will do this month's newsletter. Brock and Patterson thanked everyone for joining the meeting.

Closing

Brock thanked everyone for a productive meeting. Jeans reminded the committee subcommittee meetings on June 2, 2022, and full committee meeting on June 8, 2022. Please note the short turn around. Jeans closed the meeting at 12:00pm ET.

Next Meeting: June 8, 2022, at 11:00am ET

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