



**Special Projects
Taxpayer Advocacy Panel (TAP)
Monthly Meeting Minutes
Wednesday, August 10, 2022**

Designated Federal Officer (DFO)

- Cedric Jeans TAP East Chief

Attendance

- | | | |
|-----------------------|-----------------------|------------------------|
| • Michael Avery | San Juan, PR | Member |
| • Laurie Brock | Eugene, OR | Chair (Excused 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 |
| • CJ Mills | Glenside, PA | Member |
| • Donna Patterson | Bothell, WA | Vice-Chair |
| • Rene Tiongquico | Washington, D.C. | Member |
| • James “Jim” Wiseman | Brentwood, TN | Member |

Staff

- | | |
|--------------------------|--------------------------------------|
| • Antoinette “Toni” Ross | TAP Program Analyst |
| • Robert Rosalia | TAP Program Analyst |
| • Suzanne Henderson | Tax Analyst Wage & Investments (W&I) |
| • Michael “Mike” Odom | Program Analyst W&I |
| • Leslie Henley | W&I |
| • Janet Hall | W&I |

Welcome Announcements/Comments/Acknowledgements

Cedric Jeans welcomed all attendees and opened the meeting at 11:00am ET.

Roll Call

Ross called the roll and quorum was met.

Members of the Public

None

Welcome/Announcements/Comments/Acknowledgement of Citizens

Patterson welcomed everyone to the call. She conducted the meeting on Brock’s behalf since she is in DC for the Joint Committee Face to Face Planning Meeting.

National Office Report

Jeans combined the National Office and the DFO Report out. Jeans spoke about the refocusing on the TAP mission or scopes and if any member has a suggestion please share with Ross and Jeans. All suggestions are welcomed.

Jeans spoke on preparations for the 2022 TAP Annual Report. He stated that Brock will ask for some assistance from the Special Projects members. They are trying to get the report out on time which is around January 2023.

TAP national elections for the TAP National Chair and Vice Chair is coming up soon so please think about stepping up to fill that role.

Chair Report Out

Patterson reported the JC working on www.Tapspace.org maintenance issues that had to be worked out. The JC discussed outreach which is as simple as emails, Local Taxpayer Advocate (LTA) or outreach events abroad. Patterson reminded the committee that prior approval is required for reimbursement for outreach travel. Feedback is being sought for the mentor program to help improve it moving forward. Please share any feedback with Rosalind Matherne. Michael Odom will share the status of issues elevated to the IRS on a quarterly basis.

Issue 44253 - IRS Tax Forms for Taxpayers who are Unable or Unwilling to Download or Print Forms

This will be tabled until the September 4, 2022 full committee meeting

Outreach Report

Report out from the Outreach Meeting

Patterson reminded the committee to count all outreach events no matter how small they are. Take pictures and share them so we can upload them to our website, www.improveirs.org. and do not forget to get signed photo releases for everyone that is identifiable in the photo.

Minutes Approval

July minutes. Tiongquico motioned; Lammers seconded.

Action: July minutes approved as revised.

Subcommittee 1 Report

Fox reported:

- TAP Referral Issue 59255—International Phone Apps (Referral presented by Lammers for approval to the Full Committee) This recommendation is to find a no or low-cost way for overseas taxpayers to communicate with



the IRS via a phone call or a Voice Over IP platform. Lammers motioned; Wiseman seconded (put to a vote: 7 yays and 1 nay)

Action: Issue elevated to Joint Committee

The below issues are still being worked:

- Project Proposal Issue 51824—Estate and Gift Tax Filing; This is still being worked and may be two months away from completion
- Project Proposal Issue 61244-Foreign Retirement Accounts; SME's has been requested to attend the Subcommittee 1 meeting in September 2022
- Project Referral Issue 43808—Facilitating Payments from Overseas Taxpayers by IRS Non-US Banks

Subcommittee 2 Report

- TAP Referral Issue 48336—E-Filing Form 8621 (Referral presented by Wiseman for approval to the Full Committee) This recommendation is regarding Form 8621 which should be able to be electronically filed, auto populated like other schedule forms, and consolidated if more than one is required, this would save time and money. Wiseman motioned; Lammers seconded

Action: Issue elevated to Joint Committee

- Project Proposal Issue 50524—Overseas Tax Preparers (Drop for security reasons)
- Project Proposal Issue 43867-How to File without an ITIN (Drop as legislative)

Screening Report Out

Mills reported screening 31 Issues; 10 Parking Lot; 2 transferred to TFP and 1 transferred to TCC; 8-drop: sent (TAS information); 10-drop (no action).

Internal Communications Committee

Lammers reported that ICC is setting up TAP's Facebook page and they need volunteers to be administrators and backup. The committee is working on updating the TAP handbook and they are now up to Chapter 9. They are also updating the TAP Website.

Action Items

Ross will do the following:

- Forward July minutes for posting
- Forward TAP Referrals: Issue 59255 and Issue 48336 to be added to the August JC Agenda
- Forward List of Modernized forms, capabilities, technology in the past year and planned for next year from Michael Odom

Roundtable

Patterson stated don't forget to fill in your activity record (whether you talked on the phone; attended a meeting; or even worked on a project on your own. She also said to remember that if you do outreach to get pre-approval for travel, for example: parking, tolls, etc.

Chair or Vice Chair of SP Committee Closing Comment

Patterson thanked everyone for their time and participation. And she also thanked members for having a great meeting.

Closing

Jeans closed the meeting at 11:57am ET.

Next Meeting: September 14, 2022, at 11:00am ET

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