



**Special Projects
Taxpayer Advocacy Panel (TAP)
Monthly Meeting Minutes
Wednesday, October 12, 2022**

Designated Federal Officer (DFO)

- Antoinette “Toni” Ross Acting TAP East Chief

Attendance

- | | | |
|------------------------|-----------------------|-----------------|
| • Michael Avery | San Juan, PR | Member |
| • Laurie Brock | Eugene, OR | Chair |
| • Aisha Earle | Alpharetta, GA | Member (Absent) |
| • Kimberly fox | Panama City, FL | Member |
| • Rita Green | Memphis, TN | Member |
| • 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 |
| • Martha Lewis | National Chair | Visitor |
| • Eugene “Gene” Lillie | National Vice-Chair | Visitor |

Staff

- Robert Rosalia TAP Program Analyst
- Aphillia Hughes Program Analyst W&I
- Mignon Hale Program Analyst W&I

Welcome Announcements/Comments/Acknowledgements

Toni Ross welcomed all attendees and opened the meeting at 11:00am ET.

Roll Call

Brown called roll and 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.

National Office Report

English reminded the committee to go on to www.improveirs.org to see the 20-year anniversary updates. English reminded members who want to be in leadership to get their statements together and others to be prepared to vote soon. English reported that the Most Serious Problems (MSPs) Ad Hoc meetings



went well. English also reminded everyone that the next Joint Committee (JC) meeting is on October 27, 2022, at 1:30pm ET. English praised the members who will be graduating at the end of the year and spoke of a celebration being planned for them in November. English reminded everyone to work on getting referrals completed before the TAP year ends in November. English also reminded the returning members that they can continue doing TAP work even during the down time. They just need to keep track of their activities on the activity record.

DFO Report

Ross encouraged the committee to start using the TAP 20-year logo in all of their TAP efforts for the next year. The Annual Report will be updated with the new logo, along with the TAP social media efforts. The National Taxpayer Advocate (NTA) will be releasing a blog about the TAP 20-year anniversary soon. Treasury also plans to help spread the word about the TAP 20-year anniversary.

Ross indicated there is a link of the TAP election timetable on the agenda that was sent to the committee members to follow. Ross reminded everyone to update your activity reports. Ross reported that TAP was moved under Systemic Advocacy (SA).

Minutes Approval

September 14, 2022, minutes. Wiseman motioned; Patterson seconded.

Action: August minutes approved as revised.

Chair Report Out

- TAP Annual Report

Brock emailed the committee the activity that needs to be written about for the Annual Report. Brock asked the committee to pick some part to write about to help with this project. This will include current and older issues that need to be discussed as an important part of our committee's section.

- TAP National Elections TAP Elections Timetable 2022

- Tax Forums link (Added by Brock)

Brock indicated that the training audits can be done for free. Brock also recommended members review the keynote speech given by the commissioner. Brock will forward the link to the committee via email. Brock shared via email the Annual Report for the committee to review before it is submitted. This will include current and former issues plus issues that are being considered by the committee for coverage in the Annual Report.

Outreach Report

- Report out from the Outreach Meeting
- TAP Newsletter (Future Newsletter Articles)

Patterson solicited a volunteer for the newsletter by voice or by email. It will be submitted to Matherne and O'Sullivan.

- Update your Activity Record
Please take time to complete your activity reports.

Subcommittee 1

- TAP Project Proposal Issue-Social Security WEP Notice to International Taxpayers

Avery inquired whether this is a Social Security Administration (SSA) issue or not. Lammers spoke about international taxpayers being beyond the reach of SSA, which is why this issue should be taken on by the IRS. Lammers believes the IRS can provide a more accurate estimate of who can be impacted by this issue while SSA does not. Avery indicated that the IRS should not be speaking for another federal agency.

Mills indicated in her research, the IRS sites the SSA international section for international taxpayers having issues with SSA on form 1945. Mills also stated the recommendation should reference this site by the IRS also since these taxpayers are underserved. Mills indicated this referral should lead taxpayers to the SSA for assistance with such matters.

Both subcommittees will review this issue. Ross will send the invite out to Subcommittee 2 to attend the Subcommittee 1 meeting.

- TAP Project Proposal Issue 61344—Foreign Retirement Accounts
Tabled until next month
- Project Proposal Issue 43808—Facilitating Payments from Overseas Taxpayers by IRS Non-US Banks
Tabled until next month

Subcommittee 2

- Project Proposal Issue 58722-Misleading Wording on IRS.gov Website
This issue recommended the IRS provide clarified information for international taxpayers so they are aware that an automatic extension may only be for filing and there is no extension on paying taxes that may be due. This issue is still being worked.

- Issue 44253-Increase the number of forms, publications, and instructions allowed to be ordered. (Rebuttal)
 - The committee recommends three additional suggestions to improve what is already in place.
 - IRS should expand the tax forms program to nontraditional partners.
 - Advise the public that paper filing is still an option, and how it could be done.

- Return to mailing tax packages to paper filers and those that may need or require paper packages. This could include an “opt-out” option for those receiving such forms.

Brock motioned; Lammers seconded.

Action: Rebuttal elevated back to IRS.

Screening Report Out

Mills reported on October 5, 2022, reviewed 24 issues:

- Seven went to the Parking Lot.
- Two are referrals being worked.
- Three issues referred to other committees.
- Six were no actions taken or combined with similar issues.

Two issues were related to immigrants and Avery asked, are we putting enough effort towards them given the questions about proper treatment of immigrants? Mills explained the parking lot allows for proper research for such issues allowing us to address at a later date. Avery would like to move this forward as a priority.

Internal Communications Committee

- ICC Meeting (Looking for Facebook Admins)
Tabled to next month.

Action Items

Ross will do the following:

- Forward September minutes for posting.
- Send meeting invite to Sub. 2 who will join Sub. 1 meeting.
- Annual report second draft for review.

Closing

Ross closed the meeting at 12:01pm ET.

Next Meeting: November 10, 2022, at 11:00am ET