

**Special Projects
Taxpayer Advocacy Panel (TAP)
Monthly Meeting Minutes
Wednesday, April 10, 2024**

Designated Federal Officer (DFO)

- Cedric Jeans TAP East Chief

Attendance

- | | | |
|----------------------|----------------------|-----------------|
| • Richard Bell | Corpus Christi, TX | Chair |
| • Stacy Cloyd | Washington, DC | Member |
| • Aissata Diaby | Harrisburg, PA | Member (Absent) |
| • Robert “Bob” Foley | Natick, MA | Member |
| • Tiffany Grayson | Beaufort, SC | Member |
| • Steven Hall | Holbrook, NY | Vice-Chair |
| • Steven Hoffman | Westford, MA | Member |
| • Jihan Jude | Orlando, FL | Member |
| • Rebecca Lammers | International/London | Member |
| • Jared Lefevre | Billings, MT | Member (Absent) |

Staff

- | | |
|--------------------------|--|
| • Shawn Collins | Acting TAP Director |
| • Kelvin Johnson | TAP Program Analyst |
| • Priscilla Medrano | Acting TAP Director |
| • Antoinette “Toni” Ross | TAP Program Analyst |
| • Robert Rosalia | TAP Program Analyst |
| • Mejbeen Balsara | Program Analyst Wage and Investments (W&I) |

Members of the Public

Nicholas Lee
Eric Fenster

Welcome/Opening

Jeans opened the call and welcome all attendees.

Roll Call

Quorum was made.

Welcome Announcements/Comments/Acknowledgements

Bell welcomed everyone to the call and thanked the members for joining.

National Office Report/DFO Report

Shawn Collins thanked the members for being a part of this program and is looking forward to a good year. The face-to-face meetings will take place in Jacksonville, FL; Oklahoma City, OK; and San Antonio, TX. April 15, 2024, is the

filing deadline for taxes. Collins reminded everyone that if an extension is needed, it is for filing and not paying taxes owed. Collins reminded members to check Taxpayer Assistance Centers (TACs) for Saturday openings for outreach opportunities.

The National Taxpayer Advocacy (NTA) has a monthly blog that members might want to sign up for. The recruitment period closed on March 29, 2024, with 143 applicants to be interviewed in the coming months. Please report discrepancies on activities reports to your analysts so they can be fixed.

DFO Report

Jeans referred to Brown for a discussion about travel. Brown explained the process for travel so the members know what is needed for them to travel. Brown collects information so that flights and hotel reservations can be made. Once the travel has ended, members will send any receipts so the travel vouchers can be processed for refundable expenses to get reimbursed.

Approval of Minutes

The March 13, 2024, minutes were considered for approval. With no changes Bell indicated the minutes accepted as submitted.

Action: Minutes approved as submitted.

Chair Report Out

Bell reported:

IRS Responses:

- **Issue 48551-Unequal Treatment of Overseas Taxpayers (Sub. 1)**
- **Issue 41535-Tax Practitioners Revealing their PII Information (Sub. 2)**
- **Issue 64665-Allow Amended Returns for Direct Deposit (On hold)**
- **Issue 68581-Expanded Vita Program Services for International Taxpayers (Sub. 1) Subject Matter Expert (SME) Requested**
- **Issue 44253- Increase the Number of Forms, Publications and Instructions Allowed to be Ordered (Sub. 2)**

Hall motioned; Cloyd seconded to move the issues back to the subcommittees.

Action: Issue assigned back to subcommittees to be worked.

Project Proposal Distribution:

- **Issue 71913-Provide Safe Harbor for International TPs who Receive the Expanded Child Tax Credit for 2021 (Sub. 2)**
- **Issue 71914-Enable 2024 Tax Filing Season Access to Free File Fillable Forms for International Taxpayers (Sub. 1)**

A conversation ensued regarding issues that have fallen behind for extended periods of time. Lammers suggested an audit to determine if there are any other issues that are behind with IRS responses.

Mr. Fenster requested an update on Issue 62717. Jeans indicated this was sent back to the IRs and may have been lost in translation. A response will be sent hopefully within 45 to 60 days. If done before August, it may be ready for next year 2025, according to Jeans.

Outreach Report

Hall reported:

- Please continue to do Outreach

Outreach can be done during TAP off times like January. Outreach can be as short as five minutes. This can be with your Local Taxpayer Advocate (LTA), or local politicians. Hall promoted the Direct File initiative allowing taxpayer to file their federal taxes for free. This program may get expanded next year to more states. Hall suggested asking taxpayers for opinions during your outreach. Hall is hoping to expand this to international taxpayers. There is limited eligibility for now, so we need more users to show it is being used and help with the expansion of this program, according to Lammers.

- TAP Newsletter (April Newsletter Articles due before 4/25/2024)

Hall will ask for volunteers to write this monthly.

- Update your **Activity Record**

Subcommittee 1

Lammers reported:

- Draft-Issue 65214-US Citizens Abroad with Retirement Income Issue being developed.
- Issue 71912-Prioritize Zero Tax Liability for International Taxpayers to Use Direct File by 2025

Has to go through Quality Review (QR) before a vote. Ross indicated it was sent to QR on April 8, 2024.

Subcommittee 2

Bell reported:

- Draft-Issue 66513-New Envelopes for Refund Checks

Responses being drafted to address this issue.

- Issue 67239-Electronic Power of Attorneys for Overseas Taxpayers

This will be worked later.

Screening Report

Meetings were held on February 2024 and March 27, 2024:

- Total issues screened: 103
- Total issues dropped: 73
- Total issues referred to TAS: 18
- Total issues referred to TAP Committees: 6
- Total issues in the Parking Lot: 20

- Total issues associations: 4

Internal Communications Committee (ICC) Report

Jude reported:

First meeting on April 16, 2024, at 4pm ET

Roundtable

Lammers inquired about the face-to-face meeting format and the attendees. Jeans indicated the agenda will be shared soon. Lammers inquired about an option to report on international taxpayers for the overall TAP. Jeans indicated this will be done during a forthcoming All-TAP meeting. Hoffman asked about committee member information being shared with everyone. Ross will share a list with the committee shortly. Lammers asked about the international phone line. This may be a future issue that needs to be researched possibly with the Toll-Free Phone Lines committee. Jeans suggested working this up as an issue instead of waiting for an SME. The committee is requesting SMEs for an update on these issues.

Action Items

Ross will do the following:

- Post minutes from March 13, 2024.
- Update Systemic Advocacy Management System (SAMS) on issues from the Screening Committee.
- Ross will send Issues 48551, and 68581 to Sub. 1; Issues 41535, and 44253 to Sub. 2., and Issue 64665 will remain on hold pending IRS response.
- Ross to send out rooster to Special Projects Committee.
- Lammers to send questions to Ross to forward to an SME.

Chair or Vice Chair of SP Committee Closing Comment

Bell thanked everyone for all the work you do. Hall asked that members not get discouraged. Bell said we are looking forward to the face-to-face.

Closing

Jeans thanked everyone for attending the first meeting. Closed the meeting at 11:57am.

Next Meeting: Friday, May 10, 2024, at 9am ET.