

**Special Projects  
Taxpayer Advocacy Panel (TAP)  
Monthly Meeting Minutes  
Wednesday, November 13, 2024**

**Designated Federal Officer (DFO)**

- Cedric Jeans TAP East Chief

**Attendance**

- |                       |                      |                     |
|-----------------------|----------------------|---------------------|
| • Richard "Rick" Bell | Corpus Christi, TX   | Chair               |
| • Stacey Cloyd        | Washington, D.C.     | Member              |
| • Aissata Diaby       | Harrisburg, PA       | Member              |
| • Tiffany Grayson     | Beaufort, SC         | Member              |
| • Steven Hall         | Long Island, NY      | Vice-Chair (Absent) |
| • Steven Hoffman      | Westford, PA         | Member              |
| • Jihan Jude          | Orlando, FL          | Member              |
| • Rebecca Lammers     | International/London | Member              |
| • Jared Lefevre       | Billings, MT         | Member (Absent)     |

**Staff**

- |                          |  |
|--------------------------|--|
| • Kevin Brown            | Management Assistant                           |
| • Shawn Collins          | TAP Director                                   |
| • Conchata Holloway      | TAP Program Analyst                            |
| • Kelvin Johnson         | TAP Program Analyst                            |
| • Robert Rosalia         | TAP Program Analyst                            |
| • Antoinette "Toni" Ross | TAP Program Analyst                            |
| • Robert Rosalia         | TAP Program Analyst                            |
| • Ann Tabat              | TAP Program Analyst                            |
| • Dale Hawkins           | Program Analyst Taxpayer Services (TS)         |
| • John Manhire           | Legal Admin. Specialist Systemic Advocacy (SA) |

**Members of the Public**

None

**Welcome/Opening – Designated Federal Official (DFO)**

Jeans opened the meeting and welcomed all in attendance.

**Roll Call**

Quorum was made.

**Welcome Announcements/Comments/Acknowledgements**

Bell thanked everyone for joining the call.

**National Office/DFO Report**

Jeans encouraged all members to vote in the TAP National leadership elections with Thursday being the last day. Jeans gave the committee a timeline for the end of the year big ticket items:

- The staff is working on the recruitment package.
- The staff will work on the training material for next year.
- The staff and committee will plan for the face-to-face soon.
- We'll have a training session forecasting the year's plans early next year.
- We are working on finalizing the Annual Report for this committee.
- A committee selection email will go out soon from Susan Jimerson.

Jeans thanked the committee for a truly remarkable year with all the work done by this committee. Jeans acknowledged the leadership of Bell and Hall also. Jeans thanked all of the retiring members for a great three years on TAP. Jeans encouraged the returning members to be ready for another exciting TAP year.

Jeans thanked the Taxpayer Services, other IRS units and our Attorney Advisors for their support this year.

### **Approval of Minutes**

The October 9, 2024, meeting minutes were presented for approval. Hoffman motioned; Lammers seconded.

**Action: Minutes approved as submitted.**

### **Chair Report**

Bell reported: to IRS Responses:

- Issue 63737- Data on Wage and Income Transcripts

Accepted with a possible new issue next year. Hall motioned; Cloyd seconded.

**Action: Response accepted**

- Issue 48551- Unequal Treatment of International Taxpayers

Hoffman does not agree with the response as there are no Taxpayer Assistance Centers (TACs) outside of the US and many of the issues brought up are not possible or helpful to the taxpayers. Lammers agreed with Hoffman and said three years to respond was another issue. There was not even any effort to provide any solution for expats. There were no good reasons for not accepting a lot of the referrals, so Lammers suggested rebutting this response. Prioritizing the Chatbot for international taxpayers might be a good solution along with several other issues. Lammers motioned Hoffman seconded.

**Action: Response not accepted.**

Two Issues to be presented to the November Joint Committee (JC) Meeting:

- Issue 71578-Stay Informed on Individual Taxpayer Identification Number (ITIN) Expirations and Review Foreign Agent Details on IRS.gov has been placed on the October JC Agenda.
- Issue 74276- Identify Verification for International Taxpayers on Where's My Refund

TAP Annual Report:

Bell indicated we are working on this and close to being done.

### **Outreach Report**

Ross Reported on Hall's behalf:

- Please continue to do Outreach
- TAP Newsletter (Due to Vice Chair on the twenty-third of the month- (Steven Hall for December)
- Update your **Activity Record in [www.TAPSpace.org](http://www.TAPSpace.org) (Third-year members should ensure that you update your records)**

### **Subcommittee 1: Report out- Lammers**

- Issue 71593-Foreign Direct Bank Deposit

Ross said this is still being reviewed by Systemic Advocacy (SA) and Attorney Advisors (AA). This issue is asking the IRS to prioritize non-US bank account transfers for refunds and receiving payments for taxes due from non-US bank accounts. There is a recommendation to give the option for international taxpayers to receive a bank transfer instead of a check. This would make it this easier for international taxpayers. Lammers motioned; Jude seconded.

**Action: Issue elevated to JC for consideration. Pending Quality Review (QR)**

Lammers reported there are a few issues tabled for next year.

### **Subcommittee 2: Report- Hoffman**

- Issue 67748-Postal Codes in Direct Pay (DRAFT Referral Completed)

This issue seeks to accommodate to allow expats to input an international postal code for mail. Hoffman motioned; Lammers seconded.

**Action: Issue elevated to JC for consideration pending QR.**

- Issue 70063-Insuance of an Estate Tax Closing Letter (ETCL)

We need more information for this issue.

- Issue 66339-Going to Appeals (Research: Need more information on how appeals were disposed of)

We need more information for this issue, but Hoffman has sent some information to the subcommittee via email.

### **Screening Report:**

- 12 Issues screened; seven dropped; and five in the parking lot.
- Four project proposals for discussion (66063; 66912; 68356; 69843)

### **Internal Communications Committee (ICC)**

Jude reported reviewing Issue 68481 allowing members of the public to join an email list for TAP meetings. They are still working this issue. The committee has several issues scheduled for posting on the Facebook page.

### **Roundtable**

Lammers worked with the Hawaii Local Taxpayer Advocate (LTA) Problem Solving day. Lammers is planning to continue to do them after her TAP appointment ends. Lammers said it's been a pleasure working with committee and being on TAP. Lammers spoke about continuing to advocate for international taxpayer issues as they are serious and important and should not be so difficult to do their civic duty. Kurita thanked the committee members on a very productive year and said she appreciates all you do. Kurita encouraged everyone to vote and appreciates the focus on international taxpayers.

Collins appreciates all the efforts and work done by this committee this year. We will miss the third-year members and I love the passion they have working on what is best for the taxpayers. Collins is looking forward to working with the returning members next year. Collins encouraged members to vote, complete their activity reports and to attend the Celebration of Service event.

### **Action Items**

- Send approved October minutes to Brown.
- Issue 71593 elevated to the JC pending QR.
- Issue 67748 elevated to the JC pending QR.
- Issues 71578 and 74276 from last month to JC.
- Working on a new possible issue related to Issue 63737.
- Working rebuttal for Issue 48551.
- Accepted response for Issue 63737.

### **Chair or Vice Chair of SP Committee Closing Comment**

Bell said it's been an honor to serve as the committee chair and thanked everyone for all the work this year.

### **Closing**

Jeans thanked everyone for all the work done by this committee. The staff is still available, and there may be a need for Ad Hoc or screening meetings during this issue. Retiring members can forward issues to the TAP mailbox or the committee analyst. Do outreach. Jeans closed the meeting at 11:52am ET.

**Next Meeting: TBD**

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