



**Special Projects Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
April 9, 2020**

Designated Federal Officer

- Cedric Jeans

Designated Federal Officer

Members Present

- | | | |
|-------------------|----------------------|------------|
| • Michael Avery | San Juan, PR | Member |
| • Gina Gray | Nichols Hills, OK | Member |
| • Dorothy Havey | Belfast, ME | Member |
| • John Hughes | Memphis, TN | Vice Chair |
| • Robert Moretti | Great Falls, MT | Member |
| • Brandon Ruest | N. Providence, RI | Member |
| • Richard Russell | Owens Crossroads, AL | Member |
| • Laura Snyder | Paris, France | Member |
| • Cynthia Torres | Riverside, CA | Member |
| • Cheryl Williams | Shelton, WA | Chair |

Members Absent

- | | | |
|-------------------------|-------------|--------|
| • Cassandra Knight-Page | Houston, TX | Member |
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Staff

- Rose Babb, Management Assistant
- Tamikio Bohler, W&I Program Analyst
- Terrie English, TAP Director
- Antoinette Ross, TAP Program Analyst
- Ashley Halbash, CSO Program Analyst
- Debra Awalt, W&I Program Analyst
- Sheila Andrews, CSO Executive Deputy Director

Welcome Announcements/Acknowledgements

Cedric Jeans welcomed all and declared the meeting opened; he then turned it over to the Chair.

Chair Comments

Cheryl Williams welcomed all and proceeded with the agenda.

Roll Call

There were no public members on the call.

Quorum

Quorum was met for this meeting.



National Office Report

Terrie English welcomed all to the meeting and reported the following:

- The IRS is receiving daily updates on the COVID-19 pandemic including the Economic Stimulus Package.
- Be very vigilant to scammers pretending to be government employees.
- The new National Taxpayer Advocate (NTA), Erin Collins started last week; she will have a meet and greet via teleconference with TAS staff via teleconference on April 9, 2020.
- Any new updates gathered from the Stimulus package during the teleconference with the NTA for taxpayers will be shared with the TAP panel members.
- Members are encouraged to send emails with questions they may have to English.

DFO Report

Jeans shared the following:

- TAP Recruitment period has been extended until April 20, 2020 for the year 2021. Members are encouraged to share this recruitment effort with their neighbors and friends. Job announcement can be found on **improveirs.org**.
- News Release examples are available for members to tweak for their outreach events or for submission to member's local news outlets. Note that the new NTA, Erin Collins name should replace Nina Olson before distributing any literature to the public.
- If members are interested in conducting virtual outreach events and, would like to make presentations, the TAP Staff can assist with setting up WebEx sessions. These events can be facilitated only during business hours, Monday through Friday 8:00am – 4:30pm Eastern time. Reach out to your TAP Analyst for assistance.
- For the latest updates on COVID-19, members were asked to subscribe to IRS.gov/COVID.
- Business cards were ordered and will be available in a few weeks; an email will be sent out to inform members once it arrives.

Minutes Approval

The draft minutes from the TAP 2020 Virtual Face to Face Meeting in March was approved for posting to improveirs.org.

Outreach Report

John Hughes informed the members that he will send an email reminder to submit their TAP Activity Reports by the 25th of each month. Hughes also mentioned to the members that they should tweak the TAP News Release letter and then send it to radio stations, newspapers, local groups, and the options for bulletin boards.

Approval of IRS Responses



The committee had a brief discussion on the status of the following issues:

Issue# 35185- International Future State- Tamikio Bohler will follow-up on the status of this issue which was submitted to the IRS in 2017. Ross will send supporting documentation to Bohler.

Issue# 35966- Deficient Options for Accessing Account Online- the committee agreed to do a follow up with Bohler on the status of this issue.

Issue# 37026- Prevention of ID Theft Relating to Refunds- the committee has accepted the IRS response.

Issue# 41230- Foreign Trust and IRS Penalty Notification for Late Forms- the committee has accepted the IRS response.

Issue# 41405- Tax ID PIN Request Process and Victim of ID Theft Issue Letter CP 5747C- the committee agreed to revisit this issue pending the new instructions received from the IRS.

Issue# 41566- TINS and GTNS -This issue will be discussed at the next full committee. Ross will put this final issue on next month's full committee agenda.

Subcommittee 1 (International) Report out by Williams

Issue# 41749 – Difficulties in Filing US Taxes from Outside USA- the subcommittee will review this issue with the assistance of a Subject Matter Expert (SME) at the next subcommittee 1 meeting. An update will be prepared for the next full committee meeting in May. Note the Issue #41749 has been combined with Issue 41752.

Subcommittee 2 (ID Theft) Report out by Hughes

Issue# 41535 - Practitioners Revealing Their Social Security Numbers (SSNs) – The subcommittee decided that this issue should be researched via Systemic Advocacy Management Systems, SAMS to determine if there are related issues. There will also be a follow up discussion at the next full committee meeting in May.

Issue# 41296 - Quick Withdrawal of Power of Attorney (POA)'s from Form 2848 – this subcommittee has requested that a SME be present at the next subcommittee meeting.

Screening Committee Report out by Snyder

Snyder reported that her committee is reviewing issues and will have their first meeting in April 2020 and will inform if there are any issues for both Subcommittees 1 and 2 at the next full committee in May.



Action Items

- Ross will forward approved final March 2020 Special Projects Meeting Minutes to the management assistant for posting to the Federal Register.
- Ross will request a Subject Matter Expert for both subcommittees to review Issues 41296 and 41749.
- Members can reach out to TAP Staff if they are planning any virtual outreach events and would like to use WebEx- assistance will be provided- contact the TAP Staff.

Closing

Jeans and Williams thanked the members for their time and participation and Jeans declared the meeting closed.

**The next Special Projects Committee meeting will be on
Thursday, May 14, 2020 at 11:00 a.m. -12:00 p.m. ET.**

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