



**Special Projects Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
August 13, 2020**

Designated Federal Officer

- Cedric Jeans Designated Federal Officer

Members Present

- | | | |
|------------------------|----------------------|------------|
| • Michael Avery | San Juan, PR | Member |
| • John Hughes | Memphis, TN | Vice Chair |
| • Phillip Klieber | Roswell, GA | TAP Chair |
| • Robert “Bob” Moretti | Great Falls, MT | Member |
| • Richard Russell | Owens Crossroads, AL | Member |
| • Laura Snyder | Paris, France | Member |
| • Cheryl Williams | Shelton, WA | Chair |
| • Gina Gray | Nichols Hills, OK | Member |

Members Absent

- | | | |
|-----------------|-------------------|--------|
| • Dorothy Havey | Belfast, ME | Member |
| • Brandon Ruest | N. Providence, RI | Member |

Staff

- Antoinette “Toni” Ross, TAP Program Analyst
- Antonia “Toni” Keeling, TAP Program Analyst
- Conchata Holloway, TAP Program Analyst
- Fred Smith, TAP Program Analyst
- Michael Odom, Wage & Investment (W&I) Program Analyst
- Kevin Brown, Administrative Assistant
- Cynthia “Cindy” Jones W&I Supervisor
- Debra “Debbie” Awalt W&I Program Analyst

Welcome Announcements/Acknowledgements

Cedric Jeans welcomed all attendees and opened the meeting. Jeans noted a change to the agenda, Terrie English is out today, and he will fill in for her.

Chair Comments

Cheryl Williams welcomed everyone to the call.

Members of the Public

None

Quorum

Quorum was met.



National Office Report/DFO Report

The Joint Committee Planning session starts August 25-26, 2020 from 1:30-3:30 p.m., which is open to public. This meeting is working on TAP committee projects for the 2021 year. Jeans asked members to share with the Chair any projects or suggestions they may have for next year. There will be an All TAP Virtual meeting on August 17, 2021 at 1:00 p.m. ET, where the executive and deputy executive directors for Communications, Stakeholder Liaison & Online Services will be reviewing the IRS roadmap. All members are encouraged to join this call.

Jeans asked members to encourage taxpayers and tax professionals to attend the tax forums since TAP has a booth.

Minutes Approval

July 9, 2020 Special Projects Minutes were approved with corrections. Page 2, issue 41566, “in the bucket” was removed and now reads “**IRS said there is always room for improvement.**” Russell motioned; Snyder seconded.

Action: Minutes approved as amended

Outreach Report

John Hughes shared the following updates for the Outreach committee:

- Toolkit project is finalized and available on www.tapspace.org.
- Special Projects had 100% submittal of activity reports for the second month in row.
- Submit Activities reports by twenty-fifth of each month.

Hughes reminded members to submit their activity reports by the twenty-fifth of the month to send copy to Hughes, Ross, and TaxpayerAdvocacyPanel@irs.gov.

Subcommittee 1 (International) Report

Cheryl reported on Dorothy’s behalf:

- IRS Response to Issues 41526 and 41566- **Placed in monitor status to be followed up later this year.**
- TAP Referral for Issue 41749 –Delays in Delivery of Correspondence to Overseas Taxpayers- Ross will work with members to submit questions to the Subject Matter Expert (SME) to address this issue.

Subcommittee 2 (Identity Theft)

Hughes reported:

- Project Referral Issue 42213-IRS Online Account Forms Availability Williams noted that barriers should be identified before this referral moves forward to avoid delays by the IRS. This issue is tabled due to the need for input from a SME.
- Project Referral Issue 42419-Verification of Identify for Federal Tax Returns This issue is still being worked.



Internal Communications Committee (ICC)

Ross reported Gina Gray is the new committee member on ICC. Williams will work with Ross for this month's ICC report for the next newsletter.

Ice Breakers

If you could only have a choice of one on a sandwich which would you choose, avocado or bacon? Avocados were the favorite.

Action Items

Antoinette Ross will do the following:

1. Send amended minutes to Brown to be posted.
2. Monitor Issues 41526 and 41566.
3. Contact SME for meeting with Subcommittee 1 for issue 41749.
4. Collect committee questions by August 20, 2020, for the meeting.
5. Request SME for Issue 42213.
6. Work with Gina Gray on ICC and the newsletter.

Closing

Jeans thanked everyone for attending and reminded members of the All TAP virtual meeting on August 17, 2020 at 1:00 p.m.

**Next Meeting: Wednesday, September 10, 2020,
11:00 a.m. ET, 10:00 a.m. CT, 9:00 a.m. MT, 8:00 a.m. PT**

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