



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

**Designated Federal Officer**

- Cedric Jeans Designated Federal Officer

**Members Present**

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

**Members Absent**

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

**Staff**

- Terrie English, TAP Director
- Antoinette "Toni" Ross, TAP Program Analyst
- Conchata Holloway, TAP Program Analyst
- Fred Smith, TAP Program Analyst
- Toni Keeling, TAP Program Analyst
- Annie Gold, Administrative Assistant
- Michael Odom, W&I

**Welcome Announcements/Acknowledgements**

Cedric Jeans welcomed and opened the meeting.

**Chair Comments**

Cheryl Williams stated the Committee is more than halfway through the year.

**Member of the Public**

None

**Quorum**

Quorum was met.

**National Office Report**

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

- The Tax Forums will start July 21, 2020 through August 20, 2020. Fred Smith, TAP Outreach Analyst sent an Email to members with information



to sign up. The Forums will be held virtually this year. There will be a chat room available. Members will sit in on the chat room and answer questions from Taxpayers. Smith will provide training and share information with members during the Outreach Committee meeting. Members were encouraged to respond to Smith with their interest and availability. The number of days and hours will be determined by the number of volunteers who agree to participate

- The Joint Committee has been asked to participate in answering questions for the Taxpayer First Act Office of the Internal Revenue Service. Information will be shared with members. The dates are July 15, 2020 and July 16, 2020. Kevin Brown will be sharing more information with each member. Members will be able to choose which day they would like to participate
- The Joint Committee will meet on July 23, 2020

### **DFO Report**

Jeans shared the following:

- An article was published and released in the June Objective Report on [www.TAPSpace.org](http://www.TAPSpace.org) showing some of the work being done in the public. It addresses all the topics that goes into the Annual Report. On page 72 and page 223 there is information on TAP. Members were encouraged to read over the report as there could be some information on projects and some concerns by the public being worked.
- Tax Filing deadline is July 15, 2020. If there are any questions, Jeans is available

### **Minutes Approval**

June 11, 2020 Special Projects Minutes were approved with corrections.

### **Approval of IRS Responses**

Williams shared the following response from IRS:

- **41566**, was not adopted. IRS said there is always room for improvement. It would require a regulation change. Full Committee held discussion on direction to take. Jeans explained this pursuant for regulation or legislative changes goes outside the mission of TAP. English suggested the committee forward to Systemic Advocacy to look at and to make sure TAP remains within the guidelines

**Decision: Full Committee Consensus take the response back to the Subcommittee for possible rebuttal.**

**Action Item: Antoinette Ross will include English on the meeting for discussion**

### **Outreach Report**

John Hughes shared the following:

- The Activity Reports were at 100% submission for the month of June



- Outreach committee is currently working on updating the Outreach Toolkit and information organized to engage with Taxpayers

### **Subcommittee 1**

Williams shared the update in Dorothy Havey's absence.

- A SME, Attorney Advisor and Systemic Advisor was invited to the International Subcommittee meeting for Issue **41749**, penalties may need a legislative change. Research was done to find the difference between statutory and non-statutory Notices. Full Committee discussion was held on direction to go with the issue. Subcommittee will continue to work on this issue and invite a SME to their August meeting
- Questions will be sent to Wage and Investments (W&I) requesting a SME on Issue **41526**, different languages and rejection by IRS. Ross will schedule the meeting with the SME once questions have been submitted
- **Issue 41565**, response on 8966 from IRS was received. The Subcommittee will work on a rebuttal

### **Subcommittee 2**

John Hughes explained the status for Issues:

- **Issue 41535**, Practitioners Revealing Their Social Security Numbers (SSNs) was elevated to the Joint Committee but due to COVID-19 IRS is currently implementing a short-term solution that will be terminated at the end of the year 2020. The Subcommittee will table this issue and revisit at that time. More details will be added and resubmitted for a permanent solution
- **Issue 42213**, was received from the Screening Committee. It deals with a couple of issues. Subcommittee 2 is working on this issue. It involves gaining access forms online through an IRS portal
- **Issue 42419**, is a combination of three to four issues received from the Screening Committee on verifying Taxpayers identification on Federal Tax Returns. Subcommittee 2 anticipates having more information to report during the next Full Committee meeting

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

Robert Moretti stated he attended the ICC meeting. There is a need to have a member take the lead on this committee as the representative. Discussions were held on the current project to upgrade [www.TAPSpace.org](http://www.TAPSpace.org) and improve [www.ImproveIRS.org](http://www.ImproveIRS.org) There were a number of TAP members attending the call. Members were asked to submit a preview of what was being planned so that the contractors would be able to offer their expertise. It was suggested that New Members would take this opportunity to review and submit their questions or ideas.

- The contractors asked ICC to submit a project referral. ICC submitted project referral **43192**
- The other topic was getting excitement around Facebook. Members were asked to join if interested and look at the site



- The Newsletter has a deadline of the 25<sup>th</sup> of each month. Members with good ideas were encouraged to share the success stories
- Tax Forums participation responses are due back to Fred Smith. Williams added encouragement to members.

### **Action Items**

Antoinette Ross will do the following:

- Forward approved June 11, 2020 Minutes to be posted
- Pull excerpts from 2018 ARC for rebuttal on Issue **41566**
- Receive questions from the Subcommittees on Issue **41566** and **41565**
- Invite SMEs to appropriate meetings
- Follow up on the Attorney Advisor SME that has been invited for Issue **41749** for Subcommittee 1
- Make sure Terrie is on the call for August 2020 meeting
- Moretti requested a copy of the Objective Report for review. Jeans will make sure a copy is provided.
- Hughes added make sure the July Activity Reports are submitted by the 25<sup>th</sup> of the month. Send a copy to Hughes, Ross, and the TAP email
- Williams encouraged members to consider being a part of the ICC as the representative. Moretti shared he would provide information to members.
- Williams will share published article she received to be used in the July Newsletter.

### **Closing**

Jeans thanked everyone for attending and the meeting was officially closed.

**Next Meeting: Thursday, August 13, 2020,  
11:00 a.m. ET, 10:00 a.m. CT, 9:00 a.m. MT, 8:00 AM PDT**

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