



**Special Projects Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
June 11, 2020**

**Designated Federal Officer**

- Cedric Jeans Designated Federal Officer

**Members Present**

- |                   |                      |            |
|-------------------|----------------------|------------|
| • Michael Avery   | San Juan, PR         | Member     |
| • Dorothy Havey   | Belfast, ME          | Member     |
| • John Hughes     | Memphis, TN          | Vice Chair |
| • Phillip Klieber | Roswell, GA          | TAP Chair  |
| • Robert Moretti  | Great Falls, MT      | Member     |
| • Brandon Ruest   | N. Providence, RI    | 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**

- |                         |               |        |
|-------------------------|---------------|--------|
| • Cassandra Knight-Page | Houston, TX   | Member |
| • Cynthia Torres        | Riverside, CA | Member |

**Staff**

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

**Welcome Announcements/Acknowledgements**

Cedric Jeans welcomed and opened the meeting.

**Chair Comments**

Cheryl Williams welcomed everyone to the call.

**Members of the Public**

N/A

**Quorum**

Quorum was met.



### **National Office Report**

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

- COVID-19 updates are being updated daily on [www.irs.gov](http://www.irs.gov) website
- Some IRS offices were opened only to close due to reported positive testing results for the virus
- Progress is moving forward with some of the Call Centers are re-opening. It will be some time before all is back to “normal”
- Business cards and ID Badges have been ordered but due to the 1111 Constitution Avenue office closure, they will be mailed out to members once the office has officially opened
- Tax Forums are a bulk of the Outreach. The Forums are being held virtually this year. Fred Smith is the Outreach Analyst and he will be sharing information how TAP members will be involved in the Forums. This information will be shared as quickly as possible
- The All TAP Virtual meeting will be held on June 18, 2020. Erin Collins, The National Taxpayer Advocate will be on the call. She will have a questions and answers session for members to interact with her
- The Joint Committee meeting will be held on June 25, 2020, at 1:30pm, EST and members are encouraged to attend. The TAP Chair Robert Moretti, Project Committee Chairs and Vice Chairs will be in attendance. This will give members an opportunity to see what goes on during the meeting and if there is interest in becoming a Lead or Chair

### **DFO Report**

Jeans shared the following:

- The update for an issue where taxpayers wanted to file 1040X electronically is now being made available and should become accessible during the summer. Members were encouraged to look at the option on the [www.irs.gov](http://www.irs.gov) website and [www.TAPSpace.org](http://www.TAPSpace.org) for virtual Outreach postings
- Rose Babb is away on a Detail and Annie Gold will be assisting. If there are administrative needs members were asked to contact Jeans.

### **Minutes Approval**

May 14, 2020 Special Projects Minutes were approved with corrections.

### **Outreach Report**

John Hughes shared the following updates for the Outreach committee:

- Currently working to update files for access to Outreach and any updated information
- Appreciation expressed to Laura Snyder for all the outreach she has done and contributing to the referral from Subcommittee 1 (International)
- Members were encouraged to submit their activity reports by the 25<sup>th</sup> of the month and to send copy to Hughes, Antoinette Ross, and [TaxpayerAdvocacyPanel@irs.gov](mailto:TaxpayerAdvocacyPanel@irs.gov)

### **Approval of IRS Responses**

Williams shared the following:

- One response was received back from IRS on Issue 37212. This issue involved taxpayers trying to find information on Crypto-Currency. Alternate phrases were suggested to be added to the search parameters. IRS will implement on May 20, 2020. Members were encouraged to look at what is being implemented
- Issue 41411, IRS stated this issue is under consideration and to check back next year. Issue is placed in Monitor Status to follow up on next year

**Decision: Full Committee Consensus to accept the IRS Responses**

### **Subcommittee 1 (International) Report**

Dorothy Havey stated Subcommittee 1 has been working on Issue 41749. This issue deals with extraordinary delay in getting notices to taxpayers living overseas. By the time the taxpayer gets the correspondence their response time has expired. Subcommittee 1's recommendation is to elevate this issue to the Joint Committee for consideration.

**Decision: Full Committee Consensus elevate Issue 41749 to the Joint Committee**

### **Subcommittee 2 (Identity Theft)**

Hughes began with asking for clarification on the Systemic Advocacy (SA) and Attorney Advisor (AA) process. Jeans explained the process is where the Systemic Advocacy and Attorney Advisors would review the referrals to make sure there were no conflicting information or any thing that could possibly impact the recommendation. They also look to see if there are any conflicts with the initiation prior to going to the Joint Committee. The normal processing time is 30 days. Asking for expedited service could get the process rushed through.

- **Issue 41535**, Practitioners Revealing Their Social Security Numbers (SSNs) Practitioners should not have to reveal their SSN and/or date of birth for ID proof when contacting IRS when their clients are in the same room. The goal is to develop an ID number or some other process of identification to prevent revealing their personal information.

**Decision: Full Committee Consensus elevate Issue 41535 to the Joint Committee for consideration**

- **Issue 41296**, Quick Withdrawal Process of Power of Attorney (POA)'s from Form 2848. The Subcommittee reviewed and recommended the implementation of a faster or online withdrawal process be in place.

**Decision: Full Committee Consensus elevate Issue 41296 to the Joint Committee for consideration**

### **Screening Committee Report**

Laura Snyder reported the Screening Committee had two meetings since the last Full Committee meeting. Some of the Issues have been combined relating to the same issue. The Screening Committee suggested the following:

- Subcommittee 2 have four to five issues related to ID verification and online accounts, claiming persons as dependents and fraudulently plus how protection has been placed on this, also how long it takes to process Spousal Returns
- Overseas Taxpayers: One issue allowing overseas taxpayers to submit simplified tax returns, how Notices of a Tax Debt is sent out that could trigger the revocation of a passport, how IRS sends out is it regular mail, how taxpayers can establish an online account, Tax Preparers are not competent. It was suggested IRS put in place guidance to ensure affordable and competent preparers
- Bob Moretti suggested once the issues are assigned to a subcommittee the subcommittee would decide. Jeans added the subcommittee would determine what issue to work from the Parking Lot. They would sort through the issues to associate and combine the like issues.

**Action Item: Snyder will compile a listing with all the possible issues: 42907, 42879, 42967, 42978 and 42996 to be forwarded to members to determine which Subcommittee will work each issue.**

### **Internal Communications Committee**

Two volunteers are needed to represent Special Projects on the ICC. Ross stated the ICC discussed during their last meeting Social Media (Facebook to be exact). They currently have a Facebook group. ICC works on the Newsletter and collect articles from committees to go in the newsletter. The ICC meets once a month on the fourth Tuesday at 3:00pm EST. May 26, 2020 was the last meeting. Decision on who will be on the ICC will be tabled for next month's meeting.

### **Action Items**

Antoinette Ross will do the following:

- Forward approved May 14, 2020 Meeting Minutes to be posted
- Wait for Snyder to forward the list showing the issues from the Screening Committee
- Follow up with an Email to members to send to Williams for volunteering for the ICC
- Update SAMS with the elevation of Issues 41749, 41535 and 41296 to be elevated to the Joint Committee after forwarding to SA and the AA
- Alert Committee if responses are received back from SA and AA

### **Closing**

Jeans thanked everyone for attending and reminded members of next month's meeting. The meeting was officially closed.



**Next Meeting: Thursday, July 9, 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.**