



**Special Projects Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
May 14, 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 |
| • 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 |
| • Cynthia Torres | Riverside, CA | Member |
| • Cheryl Williams | Shelton, WA | Chair |

Members Absent

- Cassandra Knight-Page Houston, TX Member

Staff

- Rose Babb, Management Assistant
- Tamikio Bohler, W&I Program Analyst
- Terrie English, TAP Director
- Antonia Keeling, Program Analyst
- Antoinette "Toni" Ross, TAP Program Analyst
- Ashley Halbash, CSO Program Analyst (Absent)
- Michael Odom, Program Analyst
- Debra Awalt, W&I Program Analyst

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

English welcomed all to the meeting and said the following:

- The IRS providing daily updates on the COVID-19 pandemic and the Stimulus package. Communication Stakeholder Organization, CSO has teleconference updates twice weekly.
- Taxpayers can get the latest information by using the IRS.gov link which is being updated frequently.
- TAP Staff will provide the members with COVID -19 information which will enable them to provide accurate information when conducting outreach activities with the public.
- The IRS staff at some essential locations are operating as a skeleton staff due to an employee that contracted COVID 19.
- At the TAP members 1st Quarterly meeting scheduled for June, a SME will be invited to address the members and entertain questions they may have on the COVID-19 and the Stimulus package as it relates to taxpayers.

DFO Report

Jeans shared the following:

- The TAP staff has started the process of contacting applicants for interviews for the new year 2021. The ranking process has been completed.
- Members were told to look for an email requesting their participation in conducting the interview process. If members can assist, they should respond to the committee analyst with their schedules. Their schedules will be accommodated.
- In order to observe the FACA rules of Advisory Group Meetings, when members are conducting virtual outreach activities with the public, they must copy the TAP Email box.
- TAP will have its 1st Quarterly meeting in June; details will follow for the date and time.

Conchata Holloway, a new TAP Program Analyst introduced herself to the members; Holloway will be the Taxpayer Communications Committee analyst and Gilbert Martinez will assist her with the committee's work. Members were informed that they will receive emails addressed to them from Holloway as well.

Minutes Approval

The draft minutes from the April 9, 2020, committee meeting was approved for posting to improveirs.org.

Outreach Report

Hughes informed the members that the Outreach Committee Members are reviewing the TAP material in TAPSpace to ensure that they are current for



outreach purposes. He also reminded the members that their outreach activity reports are due on the 25th of each month.

Approval of IRS Responses

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

- 36969 – Clarity Instructions on Form 1040 – This issue was accepted and implemented by the IRS; the members accept the IRS responses.
- 41526 – IRS Forms and Instructions/Expanded Foreign Language- this IRS response was not approved by the IRS and was returned to the committee. A SME will be consulted with before the next full committee meeting.
- 41565 - TIN Matching with Form 8966s Under FATCA- the committee voted to have this issue be reviewed for reconsideration. A Subject Matter Expert, SME will be consulted with to answer some questions.
- 41566 – TINs and GIINs – the committee voted to have this issue be reviewed for reconsideration. A Subject Matter Expert, SME will be consulted with to answer some questions.

Subcommittee 1 (International) Report out by Williams

Issue 41749 – Difficulties in Filing US Taxes from Outside USA- the subcommittee reviewed this issue with a SME who provided some suggestions. The subcommittee will also submit the referral.

Subcommittee 2 (ID Theft) Report out by Hughes

Issue# 41535 - Practitioners Revealing Their Social Security Numbers (SSNs) – A SME attended the subcommittee meeting and talked about the practice of identifying who they are to the IRS. They usually have to give their SSN and/or date of birth for ID proof and that is usually asked of them while they have clients in their presence.

Issue# 41296 - Quick Withdrawal of Power of Attorney (POA)'s from Form 2848 – The same SME also spoke on the withdrawals from POAs.

This subcommittee will work on a written draft referral for both issues; this subcommittee will also bring these issues to a discussion at the next subcommittee meeting.

Screening Committee Report out by Snyder

Snyder reported that her committee reviewed many of the issues, some issues require more information. Some of the other issues appear to be individual taxpayers. Some issues were put on hold and will be shared with the full committee to determine if they are appropriate for the TAP to work.

Internal Communications Committee

Ruest stated that he had nothing to report for this meeting.



Action Items

- Ross will forward the Director's administrative assistant the Special Projects approved April 2020 meeting minutes
- Ross will send the screening report to the full committee to look at the items discussed by Snyder
- Ross will update SAMS directory with the status of issues.

Closing

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

**The next Special Projects Committee will be on Thursday, June 11 at 11:00
-12:00 noon ET.**