



**Special Projects
Taxpayer Advocacy Panel (TAP)
Monthly Meeting Minutes
Thursday, October 8, 2020**

Designated Federal Officer

- Cedric Jeans Designated Federal Officer

Attendance

- | | | |
|------------------------|----------------------|------------|
| • Michael Avery | San Juan, PR | Member |
| • Dorothy Havey | Belfast, ME | Member |
| • John Hughes | Memphis, TN | Vice 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

- Brandon Ruest N. Providence, RI Member

Staff

- | | |
|--------------------------|---|
| • Kevin Brown | TAP Administrative Assistant |
| • Terrie English | TAP Director |
| • Conchata Holloway | TAP Program Analyst |
| • Antoinette “Toni” Ross | TAP Program Analyst |
| • Fred Smith | TAP Program Analyst |
| • Robert Rosalia | TAP Program Analyst |
| • Debra “Debbie” Awalt | Program Analyst Wage & Investment (W&I) |
| • Dale Hawkins | Program Analyst W&I |
| • Cynthia “Cindy” Jones | Supervisor W&I |
| • Michael Odom | Program Analyst W&I |

Welcome Announcements/Acknowledgements

Cedric Jeans welcomed all attendees and opened the meeting.

Chair Comments

Cheryl Williams welcomed everyone to the call.

Members of the Public

None



Quorum

Quorum was met.

National Office Report

English encouraged the committee to listen to the National Taxpayer Advocate (NTA) as she spoke on Capitol Hill on October 7, 2020. Both the NTA and the IRS Commissioner spoke at the House Oversight and Reform committee regarding the IRS pandemic response. The link will be sent to all of TAP. English encouraged members to share the economic impact payments, which must be registered for by November 21, 2020, to any taxpayers who may be suffering from homelessness. Ross will send this information to the committee. English reminded the committee that the business toolkit link was sent out yesterday for the committee to have access to. Jeans reported that information is available on www.tapspace.org.

DFO Report

Jeans reminded the committee that October 15, 2020 is the deadline for taxpayers who requested an extension to file their taxes. The TAP Chair and Vice Chair information session on Tuesday October 20, 2020 at 3:00pm ET. Business cards and badges were sent out so please let the staff know if you did not receive. The Mentorship meeting is at the same time so this will be sorted out and shared with the committee soon. Jeans reminded the committee that Monday is a federal holiday.

Minutes Approval

September 10, 2020. Havey motioned; Russell seconded.

Action: Minutes approved as submitted.

Outreach Report

John Hughes shared the following updates for outreach:

They are currently working on the Annual report. Hughes said that outreach can be continued throughout the year especially for returning members. Please reach out to Ross if you need more outreach hours.

- Activity Report Submission (90% submittal rate)
- Activity Report due October 25, 2020

Review of Notice and Correspondence Committee's Referrals

Rosalia gave a brief description regarding an issue that the Notices and Correspondence Committee (NCC) is working on. The NCC is requesting this committee review the letters 5071C and 4883C since they are related to identity theft, which this committee works on a lot. Please share any suggestions to these letters that this committee feels will be helpful to taxpayers with Ross by October 18, 2020.



Subcommittee 1 (International) Report

Havey reported:

TAP Special Projects Referrals to be presented at the JC Mtg:

- Issue 42967- Simplified Reporting for Taxpayers Abroad

The referral seeks to simplify the form for taxpayers who do not owe the IRS any money and improving the compliance of expats.

Action: Issue elevated to JC for elevation to IRS.

- Issue 42996- IRS Not Respecting Mandatory Use of Registered Mail

Action: Issue elevated to JC for elevation to IRS.

- Issue 41749- has been presented to the JC and was forwarded to IRS
The committee is happy this issue was elevated to the IRS.

- Issue 43614- Communications with IRS via Electronic Means

This issue is tabled until the next month committee meeting.

Subcommittee 2 (Identity Theft)

Hughes reported:

- Issue 43137-Verification/Validation During Interaction with the IRS (SME attend this subcommittee meeting and answered questions sent to Subject Matter Expert (SME))

TAP Special Projects Referrals to be presented at the JC Mtg:

- Issue 42978- Access to Competent Affordable Assistance (add US Taxpayers also?)

This referral seeks to help non-resident Americans with an affordable way to complete their tax requirements. Russell motioned; Snyder seconded.

Action: Issue elevated to JC for elevation to IRS.

- Issue 43054- IRS Accounts made Dysfunctional for Non-Resident Americans

This referral seeks to make it easier for overseas taxpayers to access online account information easier than it is currently. Because they are overseas, access to this should be easier for these taxpayers such as an online option to recover their account. Snyder motioned; Williams seconded.

Action: Issue elevated to JC for elevation to IRS.

Internal Communications Committee (ICC)

Moretti reported the Annual Report and the new TAP website update.

They discussed the newsletter and asked that members leave a comment about their history and where they did outreach for future members.



Ice Breakers

Would you prefer Mexican or Chinese food for lunch?

11 preferred Mexican food, four preferred Chinese food and one liked both.

Action Items

Antoinette Ross will do the following:

- Send approved September 2020 minutes for posting.
- Forward 42967, 42996, 42978 and 43054 to JC.
- Send submissions to Rosalia by October 18, 2020.
- Send updated Mentor Meeting to committee.
- Ross will share the economic impact payment link with the committee.

Chair or Vice Chair of SP Committee Closing Comment

Williams reminded the committee to review the email English sent about the business toolkit link. Williams reminded members to submit articles that have been requested for the Annual Report. Williams also reminded members to share any interesting outreach for the Annual Report.

Closing

Jeans thanked everyone for attending, then closed the call.

**Next Meeting: Thursday, November 12, 2020,
11:00AM EDT, 10:00 AM CDT, 9:00 AM MDT, 8:00 AM PDT**

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