



**Special Projects  
Taxpayer Advocacy Panel (TAP)  
Monthly Meeting Minutes  
Thursday, November 12, 2020**

**Designated Federal Officer**

- Cedric Jeans Designated Federal Officer

**Attendance**

- |                        |                 |            |
|------------------------|-----------------|------------|
| • Dorothy Havey        | Belfast, ME     | Member     |
| • John Hughes          | Memphis, TN     | Vice Chair |
| • Robert “Bob” Moretti | Great Falls, MT | Member     |
| • Laura Snyder         | Paris, France   | Member     |
| • Cheryl Williams      | Shelton, WA     | Chair      |

**Members Absent**

- |                   |                      |        |
|-------------------|----------------------|--------|
| • Michael Avery   | San Juan, PR         | Member |
| • Gina Gray       | Nichols Hills, OK    | Member |
| • Brandon Ruest   | N. Providence, RI    | Member |
| • Richard Russell | Owens Crossroads, AL | Member |

**Staff**

- |                          |  |
|--------------------------|--|
| • Kevin Brown            | Administrative Assistant                 |
| • Susan Jimerson         | Acting TAP Director                      |
| • Antoinette “Toni” Ross | TAP Program Analyst                      |
| • Conchata Holloway      | TAP Program Analyst                      |
| • Fred Smith             | TAP Program Analyst                      |
| • Dale Hawkins           | Program Analyst, Wage & Investment (W&I) |
| • Michael Odom           | Program Analyst, W&I                     |
| • Dave Thompson          | CSO                                      |

**Welcome Announcements/Acknowledgements**

Cedric Jeans welcomed all attendees and opened the meeting at 11:00am ET.

**Chair Comments**

Cheryl Williams welcomed everyone to the call.

**Members of the Public**

None

**Quorum**

Quorum was met.



### **National Office Report**

Jimerson thanked everyone for working so hard during this challenging year. Jimerson recognized Cheryl Williams and Richard Russell for completing three years with the TAP. Jimerson made the following reminders:

- Graduation for retiring members on November 20, 2020, at 11:00am ET.
- Joint Committee meeting on November 19, 2020 at 1:30pm ET.

### **DFO Report**

Jeans thanked the committee and Williams and John Hughes for their leadership for all the work done this year. Jeans reminded the members to turn in their activity reports for the year and explained how the totaled hours can qualify members for awards at the end of the 3-year term. Jeans asked members to complete the TAP year end survey. The first face to face meeting is still being planned and will most likely be completed virtually but updates will be sent to the committee as they are finalized.

### **Minutes Approval**

October 15, 2020. Laura Snyder motioned; Hughes seconded.

**Action:** Minutes approved as submitted.

### **Outreach Report**

Hughes shared the following updates for outreach:

- Activity Report Submission (90% submittal rate).
- Special Projects Members reached nearly 16,000 audience.
- Activity Report due November 25, 2020.
- Update your activity reports as needed for those working the TAP Annual Report.

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

Havey reported:

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

- TAP Referral for Issue 43741-No Electronic Filing for Foreign Spouses

This referral seeks to make it easier for filing without non-resident spouse information raising barriers to compliance. This will eliminate the need via all tax software providers. Issue elevated by consensus.

**Action:** Issue elevated to JC for elevation to IRS.

Project Referrals being worked by subcommittee:

Issue 43614-Communications with IRS via Electronic Means

Issue 43819-New Online Tools Needed to Update Banking Information

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

Hughes reported:

**TAP Referral Issues for JC Consideration:**

TAP Referral for Issue 43807-Facilitate Payments to IRS by Overseas Taxpayers  
This issue has five recommendations:

1. Receiving Electronic Federal Tax Payment System (EFTPS) PINs via mail.
2. All EFTPS access to overseas taxpayer addresses.
3. Make debit card payments available for low or set fees.
4. Make credit card payments available for low or no fees.
5. Enable IRS tax payments via international bank transfers using the Swift or IBAN system for low or no fees.

Snyder motioned; Williams seconded.

**Action: Issue elevated to JC for elevation to IRS.**

TAP Referral for Issue 43808-Non-US Banks not Processing US checks  
This issue seeks to have the IRS make it easier for non-resident taxpayers to receive IRS payments either by direct deposit or via debit cards. Hughes motioned; Snyder seconded.

**Action: Issue elevated to JC for elevation to IRS.**

TAP Referral for Issues:

- Issue 43137-Verification/Validation During Interaction with the IRS (waiting for more information)
- Project Referral for Issue 42777-IRS.gov Sending Taxpayers to Tools with no way of Solving the Problem (Issue Dropped by committee)

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

Moretti reported there will be November and December newsletters, so we need those reports sent. The ICC is soliciting for Facebook administrators for next year. They spoke about the check list started for mentoring committee for new TAP members. They are preparing separate checklist for the mentoring program, a TAP PowerPoint, and the name that should be used for the new mentoring program.

### **Ice Breakers**

If you had a time, where would you go and who would you like to see?

Williams- Ptolemaic Era approx. 28bc to visit Cleopatra

Havey- Elizabethan Era to experience life with the queen

Hughes- Early Chinese culture when the country was newly formed

Moretti- 100 years to speak to Einstein

Snyder- New Zealand before European settlers arrived

Jeans- Egypt to see the days of the Pharaohs

Brown- Egypt to see the pyramids being built

Holloway- Egypt pyramids

Ross- 1976 to work with Steve Jobs on the ground floor of his business

Hawkins- Israel at time of Christ



Odom- Caesar during his conquests

Thompson- November 22, 2008 to see his child's wedding

### **Action Items**

Antoinette Ross will do the following:

- Submit the minutes to post to the FACA Database
- Elevate the three approved issues to the JC
- Update SAMS regarding all the issue information

### **Chair or Vice Chair of SP Committee Closing Comment**

Williams will send the Committees' second submission for the TAP Annual Report out for the committee to review. Williams spoke about some of this year's highlights from the committee:

- Elevated 11 issues to IRS
- Working on 12 issue currently
- Helped with the redesign of the TAP website
- Participated in the Taxpayer First Act forums
- Snyder was published once
- Williams was published twice
- 257 hours of outreach
- 96 Events
- Researched the difference between statutory and non-statutory CP notices
- Learned about social media virtual outreach
- Welcomed the new National Taxpayer Advocate in September
- Informed taxpayers of mandatory Social Security benefit withdrawals

Williams encouraged members to share anything she may have missed. Join the next JC meeting if you want to know what happens to issues when we elevate them. Williams congratulated Russell for retirement. Williams thanked everyone for all they have done to contribute to a productive and successful year. Hughes thanked everyone for a productive and surprisingly successful year.

### **Closing**

Jeans thanked everyone for the entire year and welcomed the returning members for the next TAP year. Jeans gave best of luck for those running for TAP leadership from this committee. Jeans encouraged retiring members to add sources to their outreach reports for new members coming behind them. Jeans closed the meeting at 11:48am ET.

**Next Meeting: TBD**

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