

Special Projects Committee Meeting Minutes

- November 1, 2016
 - October 4, 2016
 - September 6, 2016
 - August 2, 2016
 - July 5, 2016
 - June 7, 2016
 - May 3, 2016
 - April 5, 2016
 - March 3-4, 2016
-

Special Projects Committee Taxpayer Advocacy Panel (TAP) Meeting Minutes November 1, 2016

Designated Federal Officer

- Susan Jimerson Designated Federal Officer

Attendance

- | | | |
|--------------------------|----------------------|------------|
| • Elizabeth "Liz" Chaney | Lansing, MI | Chair |
| • Sophia Sakoff | Turner, OR | Vice-Chair |
| • Catherine Jeppson | Northridge, CA | Member |
| • Mary Florence | Kansas City, MO | Member |
| • Collette Keeton | Ellenwood, GA | Member |
| • Paul Lubell | Catonsville, MD | Member |
| • Shelby Lyon | Anières, Switzerland | Member |
| • William Mason | Knoxville, TN | Member |
| • Andrew VanSingel | Wheaton, IL | Member |

Members Absent

None

Staff

- Sheila Andrews, TAP Director
- Kim Vinci, TAP Analyst
- Matthew O'Sullivan, TAP Analyst
- Annie Gold, TAP Administrative Assistant
- Debbie Awalt, W&I
- Karen Rice, W&I
- Johnnie Beale, W&I

Members of the Public

None

Roll Call

Annie Gold Quorum was met.

Opening/Welcome – Susan Jimerson

Jimerson welcomed everyone on the call and gave a brief overview of the agenda. The members were reminded to try to attend the “Meet the Candidates” call, tomorrow, November 2, 2016, at 2 p.m. EST. Meet the Candidates is an informational session and a good opportunity to meet and hear presentations from candidates as to why they should be chosen as the TAP Chair/Vice-Chair. Members may reach out to the candidates for follow-up information if they are not able to attend the meeting. The Joint Committee’s (JCs) last meeting for the year will be on November 30, 2016, at 1 p.m. EST.

Jimerson welcomed the newest TAP staff member, Matthew O’Sullivan. He is located in Oakland, California, and comes to TAP from Case Advocacy where he worked as a Supervisory Associate Advocate. Matthew O’Sullivan introduced himself to the committee.

National Office Report-Sheila Andrews

Andrews reiterated that interested members should try to attend the “Meet the Candidates” meeting tomorrow. Everyone should have received an invite. All members are eligible to vote for TAP Chair/Vice-Chair.

TAP staff will meet soon to determine recommendations for Presidential Awards. All third year members should ensure their Outreach information is submitted. There is still time to submit hours for consideration. Andrews is available if any member needs to reach her. A special thank you was expressed to all members for their hard work and dedication.

Kim Vinci added there are two candidates for TAP Chair and one candidate for Vice-Chair.

Jimerson added members should send their requests to Kim Vinci for their choice of committee they would like to work on in 2017.

Action Item: Vinci will send 2017 committee selections once she has completed the compilations.

Chair Report – Elizabeth Chaney

Chaney stated the JC had a good meeting on October 26, 2016. The JC reviewed four referrals:

- **Issue 33490, *Authentication Retention (AR) Technology***, was approved and forwarded to IRS for consideration.
- **Issue 34939, *Updating Streamline Filing Compliance Procedures on the Webpage and Link***, was approved with minor changes. Updates were made and moved forward to IRS for consideration.
- **Issue 31097, *Varying use of Case ID Numbers***, from NAC, was returned to committee for changes.
- **Issue 17399, *Payment Due Dates Are Ambiguous***, from NAC, was returned to committee for changes, clarification and formatting.

The November JC meeting is scheduled for two hours to accommodate several referrals that will be discussed and voted on for elevation to IRS.

Approval of Minutes

October meeting minutes were approved as submitted.

Member of Public

None

Program Owner

No updates provided.

Screening Committee – William Mason

Mason stated the Screening Committee members include him, Liz Chaney and Cathy Jeppson. The committee met and reported to the full Committee with recommendations for thirteen issues that were screened. This is the end of the TAP year and the issues that are voted to be kept in the Special Projects inventory will roll over to 2017. The issues that are voted to drop will be followed-up by Chaney, who will send a letter to the submitter.

- **Issue 35050**, Involves a person who submitted documents to IRS to supply requirements for ITIN. Taxpayer did not get a response. **Recommendation: Keep**
- **Issue 35223** *Refund Fuel Tax Act*
Recommendation: Keep Issue
- **Issue 35221**
Recommendation: Drop Issue
- **Issue 35119**
Recommendation: Keep Issue
- **Issue 33469**
Recommendation: Transfer to Forms and Pubs
- **Issue 34679** *Tax Audit*
Recommendation: Drop Issue
- **Issue 34916**
Recommendation: Drop Issue
- **Issue 34129**
Recommendation: Drop Issue
- **Issue 32635**
Recommendation: Keep Issue
- **Issue 28793**
Recommendation: Keep Issue
- **Issue 32488**, *Smart Card Digital Signature*
Recommendation: Keep Issue
- **Issue 29423**, *Third Party Return Prep – Online Power of Attorney*
Recommendation: Drop Issue
- **Issue 34236**, *Income Verification*
Recommendation: Drop Issue

Decision: Full Committee approved Screening Committee report and recommendations.

International Update – Shelby Lyon

Lyon stated the International Committee requests the full committee's approval to move forward with:

- **Issue 35166, Int'l SSN Form 1040 Checkbox** – the sub-committee needs the Full Committee's approval to move forward with this issue.

Decision: Consensus Full Committee move forward with additions and comments discussed.

- **Issue 35185, IRS Future State** – recommend approval to move forward with this issue.

Decision: Consensus Full Committee agreed to place Issue 35185 in parking lot and continue working to perfect in 2017 Special Projects committee.

Sub Committee II – Andrew VanSingel

Collette Keeton stated there are no updates. All meetings are cancelled until an IRS response is received for Referral #31300.

Sub Committee III – Paul Lubell

Lubell stated there were some changes from the JC's meeting. Most of which were grammatical. All changes were incorporated and submitted to Vinci to forward to Gina Jones to submit to IRS. They are waiting for the IRS response.

Outreach – Sophia Sakoff

Sakoff stated there were no updates for this month. Timesheets are to continue to be submitted through December 2016 and January 2017. Jimerson reminded everyone to keep track of all hours and activities to be reported.

Internal Communications update – Collette Keeton

Keeton stated the Internal Committee would like for all members to continue to submit items. Everyone has been doing a wonderful job. Internal Communications will be losing a few members to retirement but they look forward to the next group working together.

Action Items:

Vinci stated:

- **Issue 35166** has a few changes. Lyon will make the required changes and forward to Vinci to send to the JC.
- **Issue 35185** – The sub-committee will do additional work and meet on November 18, 2016, to look at the referral.
- **Issue 35050** – Update to reflect issue will stay with Special Projects Committee.

Jimerson added special appreciation to Liz Chaney, Cathy Jeppson and Andrew VanSingel, as they are all retiring from TAP. They will be leaving TAP at the end of the calendar year. Andrews echoed Jimerson and also recognized Shelby Lyon. Lyon will also be leaving TAP at the end of the year. Thank you to all the retiring members.

Closing

Jimerson closed the meeting.

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

**Special Projects Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
October 4, 2016**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer

Attendance

- | | | |
|--------------------------|----------------------|------------|
| • Elizabeth "Liz" Chaney | Lansing, MI | Chair |
| • Sophia Sakoff | Turner, OR | Vice-Chair |
| • Catherine Jeppson | Northridge, CA | Member |
| • Mary Florence | Kansas City, MO | Member |
| • Paul Lubell | Catonsville, MD | Member |
| • Shelby Lyon | Anières, Switzerland | Member |
| • William Mason | Knoxville, TN | Member |
| • Andrew VanSingel | Wheaton, IL | Member |

Members Absent

- Collette Keeton Ellenwood, GA Member

Staff

- Sheila Andrews, TAP Director
- Kim Vinci, TAP Analyst
- Fred Smith, TAP Analyst
- Annie Gold, TAP Administrative Assistant
- Carolyn Sanders-Walsh, SBSE
- Tamikio Bohler, W&I
- Debbie Awalt, W&I
- Karen Rice, W&I
- Liz Evans, W&I
- Johnnie Beale, W&I
- Cindy Jones, W&I
- Brianne Wilner, Business Stakeholder Relations
- Tonjua Menefee, Business Stakeholder Relations
- Mike Mcquire, Online Services
- Rose Smith, Online Services
- Eugene Burke, W&I
- Courtney Lacey, W&I
- Sheila Stevenson, W&I
- Florence Adamson

Members of the Public

None

Roll Call

Annie Gold Quorum was met.

Opening/Welcome – Susan Jimerson

Susan Jimerson welcomed everyone on the call. She gave a brief overview of the agenda. The end of the TAP year is approaching. The solicitation went out for nominees for the TAP Chair and Vice Chair positions for TAP year 2017. The Annual Report committee is working on the 2016 Report and had their first meeting; everything should be finalized and ready for publishing around the first of the year. February is the targeted date to have it completed. Returning members were encouraged to volunteer for Special Projects if they are still interested in participating on the committee. Last week, there was a TAP Informational session held for the PATH Act. Mark Johnson shared a lot of good information with members during the meeting. Andrews informed the committee that a lot of information is listed on www.TAPSpace about the PATH Act.

National Office Report – Sheila Andrews

Andrews informed the committee the end of the TAP year is approaching. The elections will be occurring. There will be an informational session held next week. Members interested can nominate themselves or any other member. Make sure to confer with the person you are nominating to get their concurrence. All members can vote, including third year members, for the TAP Chair and Vice Chair. A “Meet the Candidates” session will be held prior to the elections. Committees have been busy working on issues and are advised to keep in mind there are two more Joint Committee (JC) meetings remaining for 2016. If issues need to be carried over into next year, it is possible to do so. Thank you for all the hard work being done

Chair Report – Elizabeth Chaney

Chaney stated the JC had a good meeting.

- Issue 34106 and 34108 was approved. The Automated Underwriter Report (AUR) 2501 – (2000 Federal Notices come from the AUR)
- Issue 31300, *Access to E-Services Transcripts for ID Theft accounts* was elevated to IRS.
- Issue 34179, *Letter 0098c, 0099c & 2057c* were elevated to IRS.
- The Toll-Free Line referral was rejected.

Approval of Minutes

September meeting minutes were approved as submitted.

Member of Public

No comments

Program Owner

No updates provided

International Update – Shelby Lyon

Lyon stated the International subcommittee has two issues to discuss with the full committee. The issues are: Obtaining a Social Security number and Future State. People born in US but live abroad found out they have tax obligations. Without a Social Security number they are unable to file a tax return, their bank accounts are being closed, some are unable to obtain mortgages and other severe consequences. The process to obtain a Social Security number can take up to six months.

Meanwhile if they owe tax the penalties and interest continue to accrue. The streamline process forgives some of the issues that prevent filing on time. The committee suggested taxpayers should be allowed to have a temporary Individual Taxpayer Identification Number (ITIN) in order to file a tax return and possibly avoid some penalties and interest.

Susan Jimerson added that discussions have been held with IRS on this issue and the procedural guidance. The Internal Revenue Code (IRC) in place states US Citizens must have a Social Security number in order to file a tax return. The Treasury regulation states if a taxpayer is eligible for a Social Security number, an ITIN will not be issued. Andrews added a change has to be made to the law. There is a process in place for ITIN issuance. Kim Vinci shared the referral was sent to SA and the Attorney Advisors for review and guidance. The information she received from the Attorney Advisor confirms it is a Treasury regulation and in the IRC.

Action Item: Committee will rewrite the recommendation with more specifics and bring back to the full committee for review.

Sub Committee II – Andrew VanSingel

VanSingel did not have any updates. Elizabeth Chaney stated the subcommittee submitted the E-Services referral to the JC and it was approved and forwarded to the IRS.

Sub Committee III – Paul Lubell

Lubell shared updates for **Issue 34929, Update Streamlined Filing Compliance Procedure Webpage and Link**. The subcommittee presented the referral with several recommendations to the full committee for review and approval to move forward.

Decision: Consensus full committee move Issue 34929 forward to the Joint Committee for approval.

Outreach – Sophia Sakoff

Sakoff stated there were no updates for this month.

Internal Communications update – Collette Keeton

Keeton was not available to be on the call.

Action Items:

Kim Vinci stated:

- Make some changes on the International subcommittee referral and get ahold of Susan Hartford's or Janice Feldman to obtain more information about the Laws and Regulations for the ITIN
- Send information to members regarding Shelby Lyon's submission, Issue #35185, International Future State

Andrews advised the committee that when going outside legal for advice, it may take more than thirty days to get a response back.

Closing

Susan Jimerson closed the meeting.

The next meeting will be Tuesday, November 1, 2016, at 1 p.m. EST.

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

**Special Projects Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
September 6, 2016**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer

Attendance

- | | | |
|--------------------------|----------------------|------------|
| • Elizabeth "Liz" Chaney | Lansing, MI | Chair |
| • Sophia Sakoff | Turner, OR | Vice-Chair |
| • Catherine Jeppson | Northridge, CA | Member |
| • Collette Keeton | Ellenwood, GA | Member |
| • Mary Florence | Kansas City, MD | Member |
| • Shelby Lyon | Anières, Switzerland | Member |
| • William Mason | Knoxville, TN | Member |

Members Absent

- | | | |
|--------------------|-----------------|--------|
| • Andrew VanSingel | Wheaton, IL | Member |
| • Paul Lubell | Catonsville, MD | Member |

Staff

- Sheila Andrews, TAP Director
- Kim Vinci, TAP Analyst
- Fred Smith, TAP Analyst
- Annie Gold, TAP Administrative Assistant
- Carolyn Sanders-Walsh, SBSE
- Tamikio Bohler, W&I
- Debbie Awalt, W&I
- Karen Rice, W&I
- Liz Evans, W&I
- Johnnie Beale, W&I
- Cindy Jones, W&I
- Brianna Wilner, Business Stakeholder Relations
- Tonjua Menefee, Business Stakeholder Relations
- Mike Mcguire, Online Services
- Rose Smith, Online Services
- Eugene Burke, W&I
- Courtney Lacey, W&I
- Sheila Stevenson, W&I

Members of the Public

None

Roll Call

Annie Gold, quorum was met.

Opening/Welcome – Susan Jimerson

Susan Jimerson welcomed everyone to the meeting and gave an overview of the agenda. The Joint Committee (JC) has three meetings remaining for this year (September 28, 2016; October 26, 2016; and November 30, 2016). Special Projects has two committee meetings remaining (October 4, 2016 and November 1, 2016). Members are working to wrap up referrals as quickly as possible. The target is to have everything completed within the next month. This will allow enough time to get referrals on the agenda for the JC to review. A calendar invite was sent out to the returning members to be a part of the 2016 Annual Report Team. Any member interested in being a part of the committee, please respond to Gretchen Swayzer. There is a lot of work to be done. It does not require a large commitment but proofing could be one area to work on. A copy of the invite will be sent to Bill Mason.

Fred Smith has joined the TAP West staff and will shadow Kim Vinci for a period of time. Smith shared his acceptance into the TAP staff and looks forward to working with the members. Stacia Jones' detail has ended with TAP. She has returned to her position as a TAS Group Manager. Her time with TAP has been appreciated.

National Office Report – Sheila Andrews

Andrews thanked everyone for their condolences. She expressed appreciation for all the hard work the committee has been doing. The end of the year is quickly approaching. She encouraged the committee members to pace their work in order to have their referrals submitted to the JC in time. The JC met virtually last week. They discussed where the committees are ending this year and what the committees' focus will be for next year. Members are encouraged to provide updates and ideas to Chaney. Shelby Lyon will be resigning at the end of this year. She is working to put together information with direction and guidance for the new International member.

Chair Report – Elizabeth Chaney

Chaney thanked everyone for being on the call. WebEx was used during the JC Virtual meeting. It aided in getting a lot accomplished during the 3-day sessions. On September 1, 2016, there was a TAP informational session. Several members attended the call. Special Projects was represented. "What Happens When a Person is audited" was the topic of the session.

Chaney welcomed Fred Smith to the Special Projects Committee.

The JC talked about the Quality Review (QR) process. The standardization of the QR process was also discussed. They discussed developing a new document that will provide updated policies and procedures for reviewing referrals. A suggestion was made to have www.TAPSpace.org redesigned. This is a financial issue and priority for the TAP staff. Andrews will address this at her level. The timely submission of articles for the newsletter was addressed.

Approval of Minutes

August meeting minutes were approved as submitted.

Member of Public

No comments.

Program Owner

No updates provided.

International Update – Shelby Lyon

Lyon stated the International subcommittee has been working on the Social Security number issue only to come up against a road block preventing any further movement. A possible alternative is to pursue an ITIN for taxpayers. This temporary TIN has been discontinued. Lyon informed the committee that she will be leaving TAP at the end of this TAP year and is trying to finalize the referral.

The authentication process does not work for individuals living abroad. The get transcript function does not work. None of the online services are available for taxpayers living abroad. Tamikio Bohler asked if a Subject Matter Expert (SME) was consulted to answer questions in this area. Lyon confirmed contact was made but they were not given any definite answers or solutions.

Lyon stated she reached out to a company called OKTA outside of the Government that provides authentication services to customers for protection and security. Because of the complexity of the Social Security issue and time constraints that Lyon has before she resigns, she will write up recommendations and forward to Vinci. The committee feels the focus should be placed on the Future State referral. Andrews suggested the subcommittee write up the part that requires legislation and forward it for consideration. The tax portion does involve IRS and a write up is in order.

Shelby Lyon also mentioned that the task force she is a part of is working to possibly open TAC offices abroad. Jimerson added there needs to be an assigned issue number to correspond with the information. The issue needs to be written up to assign the number. Lyon will forward the write up to Kim Vinci to enter onto the SAMS database.

Sub Committee II - Andrew VanSingel

Keeton stated **Issue 31300 – Access to E-Services Transcripts for ID Theft Accounts** was reviewed by the JC. The subcommittee agreed with the JC that the exhibit should be included with the background information in the referral. The referral is ready for the full committee's approval.

Decision: Consensus Full Committee approved to move forward to the Joint Committee.

Sub Committee III – Paul Lubell

Bill Mason stated **Issue 34929, Update Streamlined Filing Compliance Procedure Webpage and Link** was sent to the members of the committee and has been reviewed by Quality Review. The write up is based on the Taxpayer Bill of Rights; the right to be informed, the right to quality of service and the right to pay no more than the correct amount of tax. A more defined definition on the website is needed. To access the information, taxpayers need to have Form 14653 or Form 14654. The subcommittee would like to see a better way for taxpayers to have access to the forms. The subcommittee recommends moving forward to SA and Attorney Advisor for their review.

Decision: Consensus Full Committee approved to move forward to SA and Attorney Advisor.

Outreach – Sophia Sakoff

Sakoff stated Outreach is going good. All reports are in. Members are encouraged to submit a report even if there is nothing to report. If there are any problems, members are encouraged to reach out to her or the TAP staff.

Lyon stated the Embassy asked if she would speak to bankers about legislation. Lyon will send Kim a blurb with what information she needs.

Internal Communications update – Collette Keeton

Keeton stated the Internal Communications committee is still waiting to receive articles for the newsletter. The articles can come from the chair or other members of the committee. The articles are due by the first Friday of every month in order for it to be approved on time. They have removed the limit on the number of words that can be submitted. A lot of positive feedback has been received regarding the newsletter. The Outreach Tool-Kit committee will meet tomorrow to present a referral and update Chapter 11. If there are any recommendations, please let Keeton know. Everyone is welcome to join the call.

Action Items

Vinci stated:

- Two referrals going forward
 - 31300 to JC
 - 34929 to SA & Attorney Advisors
- Information for Lyon regarding outreach to international banks
- Lyon will write up a synopsis of the issue for the International subcommittee so an issue number can be assigned
- Lyon would like more information on the guidelines/regulations that must be followed when implementing an authentication process for international taxpayers in regards to Future State. Vinci will follow-up with SME.

The Special Projects committee meetings for the remainder of the year are:

- October 4, 2016
- November 1, 2016

The Joint Committee's meetings for the remainder of the year are:

- September 28, 2016
- October 26, 2016
- November 30, 2016

Closing

Susan Jimerson closed the meeting.

The next meeting will be Tuesday, October 4, 2016, at 1 p.m. EST.

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

**Special Projects Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
August 2, 2016**

Designated Federal Officer

- Kimberly Vinci Acting Designated Federal Officer

Attendance

- | | | |
|---------------------|----------------------|------------|
| • Sophia Sakoff | Turner, OR | Vice-Chair |
| • Catherine Jeppson | Northridge, CA | Member |
| • Collette Keeton | Ellenwood, GA | Member |
| • Paul Lubell | Catonsville, MD | Member |
| • Mary Florence | Kansas City, MD | Member |
| • Shelby Lyon | Anières, Switzerland | Member |
| • William Mason | Knoxville, TN | Member |
| • Andrew VanSingel | Wheaton, IL | Member |

Members Absent

- Elizabeth “Liz” Chaney Lansing, MI Chair

Staff

- Sheila Andrews, TAP Director
- Kim Vinci, TAP Analyst
- Stacia Jones, TAP Analyst
- Annie Gold, TAP Administrative Assistant
- Carolyn Sanders-Walsh, SBSE
- Tamikio Bohler, W&I
- Debbie Awalt, W&I
- Karen Rice, W&I
- Liz Evans, W&I
- Johnnie Beale, W&I
- Cindy Jones, W&I
- Brianne Wilner, Business Stakeholder Relations
- Tonjua Menefee, Business Stakeholder Relations
- Mike McGuire, Online Services
- Rose Smith, Online Services
- Eugene Burke, W&I
- Courtney Lacey, W&I
- Sheila Stevenson, W&I

Members of the Public

- Colleen Murphy
- Doug Sword

Roll Call

Annie Gold, quorum was met.

Opening/Welcome – Kimberly Vinci

Kimberly Vinci welcomed everyone to the meeting. Susan Jimerson is away in a meeting. Vinci gave an overview of the agenda.

National Office Report – Sheila Andrews

Andrews stated the interviews are coming to an end. Thank you to all the members who have been involved with the interview process. Stacia Jones tenure with TAP is almost completed. A special thank you to Stacia Jones for all of the knowledge and insight she brought to TAP. Beginning September 4, 2016 she will be returning to TAS. Kimberly Vinci will continue to assist the Special Projects committee. There will be someone else coming on board to help assist with this committee. The end of the TAP year is approaching. There will be information sent out to the returning members in the next month or so. Members were asked to take a look at the inventory and see where their committee is at with issues. The Chair and Vice Chairs will be participating in the Virtual Joint Committee meeting later in the month. Each member is encouraged to talk with the Chair and Vice Chair and let them know what ideas, thoughts or concerns you may have.

Chair Report – Sophia Sakoff for Liz Chaney

Sophia Sakoff stated there were no updates for this meeting. Vinci added the Joint Committee has a meeting scheduled for August 16-19, 2016. It will be two (two hour sessions) each day. Members are encouraged to forward any comments to the Chairs. There are no referrals going up at this time and there are no updates at this time.

Approval of Minutes

July Meeting Minutes were approved as submitted.

Member of Public

No comments.

Program Owner

No updates provided.

International Update – Shelby Lyon

Lyon stated the International sub-committee has been looking into the issue of individuals not being able to file timely due to not being able to get a social security number. Feedback was received that notification was already being made with taxpayers through embassies. Individuals are not aware of their tax obligations. The passport renewal process for individuals who have them is assumed to be an easy thing to do. Lyon stated that on both issues, she has come up against a roadblock. A white paper write-up to get suggestions to solve this issue is the next step and it will be circulated through TAP for possible solutions. The Future State is coming. There will be some complications on the way online services will be set up for persons living abroad. To verify a person's identity and that the person has an online account will require the person to have three different documents: United States based credit card, mortgage and a United States-based cell phone. The IRS committee Lyon is working on is making progress on providing service to taxpayers living abroad. Debby Awalt suggested that the three pieces of information Lyon is referring to is possibly the authentication process. She advised Lyon to get someone from the authentication group within Wage and Investments (W&I) to speak with the committee and give them some background information on what the committee is looking for. They should be able to provide some guidance.

Action Item: Stacia Jones and Kimberly Vinci will assist and forward the information.

Sub Committee II – Andrew VanSingel

VanSingel gave a brief overview of what the subcommittee has been working on Issue 31300. Jones stated the full committee needs to review the referral and make the decision to move forward to the SA Analyst and the Attorney Advisor. VanSingel stated the subcommittee is urging IRS to improve their services with the handling of E-Services for accounts marked with identity theft indicators. The referral is to restore access to authorized parties to be able to obtain this information. It is in the write-up that IRS is making progress. They plan to have modified access in place by next year. Sakoff suggested be mindful of the language in reference to disclosure concerns.

Decision: Consensus by the full committee move forward to the SA Analyst and Attorney Advisor for their approval.

Sub Committee III – Paul Lubell

Lubell stated the subcommittee has worked diligently on finishing up the referral for the Streamlined Filing Compliance Issue. Documents are linked to United States taxpayers residing both inside and outside of the United States. The subcommittee expressed thank you to Mary Florence who alerted the committee of the issue. On July 26, 2016, the staff was asked to verify if referenced information was valid in the subcommittee's research. The subcommittee completed the referral and forwarded it to the staff. Stacia Jones will forward the referral to Quality Review. Jones explained the process once Quality Review has completed with the referral. It will come back to the full committee for consensus to move forward to SA Analyst and Attorney Advisors.

Action Item: Stacia Jones will follow up on referenced information with research and get back with the subcommittee prior to moving forward to Quality Review.

Outreach – Sophia Sakoff

Sakoff stated all reports are in except one. If there are any problems, members are encouraged to reach out to her or the TAP staff.

Internal Communications update – Collette Keeton

Keeton stated the Internal Communications committee is not receiving the 800-word reports from the chairs. The thought is maybe there is a submission issue. A meeting is requested to possibly suspend the 800 word count to try to receive articles to submit to the newsletter timely. An effort was put forth to find out if TAP members are receiving the newsletters. The committee is waiting for approval for July's newsletter. They would like for the chairs to canvass their committees to find out if the newsletter is useful or if it should be taking a different direction. Concerns can be sent to Collette Keeton at her new email address.

Action Items:

Stacia Jones stated:

- Issue 31300 – the referral will be forwarded to the full committee for review and on to SA Analyst and the Attorney Advisor.
- Find out if the referenced information for Issue 34929 should be removed from the referral for subcommittee III. If it is complete it will be forwarded to Quality Review.



- Get a SME for International subcommittee to speak on the authentication process in place for taxpayers. Debbie Awalt sent the request. The meeting is scheduled for Friday, August 19, 2016, at 11 a.m. EST.

Closing

Kimberly Vinci closed the meeting.

The next meeting will be Tuesday, September 6, 2016, at 1 p.m. EST.

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



**Special Projects Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
July 5, 2016**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer

Attendance

- | | | |
|--------------------|----------------------|------------|
| • Elizabeth Chaney | Lansing, MI | Chair |
| • Sophia Sakoff | Turner, OR | Vice-Chair |
| • Collette Keeton | Ellenwood, GA | Member |
| • Paul Lubell | Catonsville, MD | Member |
| • Mary Florence | Kansas City, MD | Member |
| • Shelby Lyon | Anières, Switzerland | Member |
| • William Mason | Knoxville, TN | Member |
| • Andrew VanSingel | Wheaton, IL | Member |

Members Absent

- Catherine Jeppson Northridge, CA Member

Staff

- Sheila Andrews, TAP Director
- Susan Jimerson, Designated Federal Officer
- Kim Vinci, TAP Analyst
- Stacia Jones, TAP Analyst
- Annie Gold, TAP Administrative Assistant
- Carolyn Sanders-Walsh, SBSE
- Tamikio Bohler, W&I
- Debbie Awalt, W&I
- Karen Rice, W&I
- Liz Evans, W&I
- Johnnie Beale, W&I
- Cindy Jones, W&I
- Brianne Wilner, Business Stakeholder Relations
- Tonjua Menefee, Business Stakeholder Relations
- Mike McGuire, Online Services
- Rose Smith, Online Services
- Eugene Burke, W&I
- Courtney Lacey, W&I
- Sheila Stevenson, W&I

Roll Call

Annie Gold Quorum was met.

Opening/Welcome – Susan Jimerson

Jimerson welcomed everyone to the meeting and reviewed the agenda. The interviews are going well. A special thank you was given to all members who are assisting the staff with the interviews. Referrals are getting prepared, forwarded on to the Joint Committee (JC) for approval and up to the IRS for consideration. Overall, things are going well.

National Office Report – Sheila Andrews

Andrews expressed appreciation to members for all the assistance with the interview process. There was an informational session held last week covering Collections and what to do if a taxpayer owes money to the IRS. There were a lot of good reviews received and the feedback was appreciated. The issue with the noise level will be addressed. She apologized to members for the inconvenience. There is a virtual face-to-face JC meeting scheduled in August. Due to budget, committee chairs only would normally go to the face-to-face meeting. This year, it will be extended to the vice chairs also. Information and calendar invites will be sent out in the next few weeks. During this meeting, chairs and vice chairs will begin focusing on what will be the areas to work in 2017. Members are encouraged to think of ideas and share with the chairs and vice chairs.

Chair Report – Elizabeth Chaney

Chaney stated there were two issues presented at the JC meeting on June 29, 2016. The Toll-Free Committee presented Issue #33494, *Authentication Retention (AR) Technology*, for approval. It was sent back for a rewrite. Tax Forms and Publications presented Issue #33916, *Form 7004*. It was returned as well.

Approval of Minutes

June Meeting Minutes were approved as submitted.

Member of Public

None

Program Owner

No updates provided

International Update –Shelby Lyon

Lyon stated the International sub-committee is still looking at the Social Security issue. They have come to a roadblock with no obvious solution. They have been unsuccessful in getting the Social Security Administration to issue a temporary Social Security number. They will be writing a referral on issues related to the Future State. One issue is if credit cards can be used for payments overseas. A response was received from IRS on Issue #32454. The sub-committee would like to get a better explanation of IRS's thoughts or provide them with a better explanation of the rejected referral. Lyon has been included on an IRS working group to put a Taxpayer Advocate abroad. She has begun looking at data to work on the case for having a Local Taxpayer Advocate put abroad.

Jimerson added if the referral and the response received from IRS is not accepted, a rebuttal would require new information that was not already submitted. The sub-committee would need to pursue a different avenue and do a new referral. Lyon added the sub-committee agreed the solution was not acceptable and they need further clarification on what the IRS was thinking or where they are on it.

Andrews added the 2016 June Report to Congress will be coming out in July. There are some International issues being addressed in the report. She encourages everyone to take a look at it. Lyon stated the committee will discuss their options with Kim Vinci and Stacia Jones.

Sub Committee II – Andrew VanSingel

VanSingel stated the committee was working on the issue for the handling of information for E-Services for accounts marked with identity theft indicators. Issue #31300 has gone through Quality Review and is ready to move to the JC for approval. The full committee made comments and changes were incorporated into the final draft. The sub-committee lost one member. Stacia Jones received the revision from VanSingel on Thursday to go to the full committee for concurrence. It will be forwarded this week to the full committee for review of the changes. Jimerson added that at the next full committee meeting in August, the committee will vote on forwarding the referral to the SA Analyst and Attorney Advisor before going on to the JC for review. It will be on the August agenda.

Sub Committee III – Paul Lubell

Lubell stated there were no issues received from the screening committee. The sub-committee is looking to work an issue presented by Mary Florence regarding non willful reporting of financial status. They are also looking for other issues to pursue. Chaney informed the sub-committee that there are areas for the sub-committee to help. The next sub-committee meeting will be held on July 26, 2016, at 11 a.m., William Mason agreed. Andrews informed the sub-committee that there will be a review of the Screening Report to see what issues are available for the sub-committee to work.

Screening Report – William Mason

Mason stated the Screening Committee met and reviewed the list presented to the members of the full committee. There were interesting topics to discuss. The conclusion was there is nothing for the committee to look at.

- **32789**, Identity Theft suggestion; adding a field to tax return for taxpayer to provide additional information. Changes to forms are Tax Form and Publications issues. Johnny Beale added the Adjusted Gross Income (AGI) is an authentication process when E-Filing. He asked if this is something the committee is recommending for a paper filed return.
Send back to Forms & Pubs. Committee
- **34218**, Gambling loss issue is suggested the losses be added against winnings.
DROP
- **34221**, Separate addresses needed for Social Security recipients. Individuals filing for compliance to the Affordable Care Act send their returns to a different address. The process was discussed with IRS. They could not identify the advantage to taxpayer on whether or not the return goes to one address or the other. Not a topic for committee to take on.
DROP
- **34233**, E-Filer who had an error not able to discern from IRS information. No specifics to refer to.
DROP
- **34236**, Income verification changes in employer's reporting of the Affordable Care Act (ACA). Taxpayers should be required to make additional reporting to complete the process. Recommended to be placed in the Parking Lot.
Place in Parking Lot

- **34249**, Lack of an International TAP member. Lyon is the International TAP member.
DROP
- **34337**, ITIN process broken. Did not see an issue. Reasonable accessible number found.
DROP

Action Item: Susan Jimerson will work with the analyst to get the letters out to the submitters with status of their issue and/or complaint.

Outreach – Sophia Sakoff

Sakoff stated she had not received the compiled report for June or any notice from the analysts stating there were any members who missed submitting their Activity Report. The committee is doing a great job. If there are any questions, send an email to Sakoff.

Internal Communications update – Collette Keeton

Keeton stated she would like to receive the report by first of the month. There will be a meeting on July 11, 2016 to discuss Facebook and speaking with taxpayers through social media. This could be an avenue to share more information with taxpayers and conduct virtual outreach. Members were encouraged to send any suggestions.

Action Items:

Jones stated:

- Elizabeth Chaney will provide an 800-word newsletter article and forward to Stacia Jones for review.
- Get updated referral, Issue #31300, with recommended quality review corrections to full committee for review and approval at August meeting.
- Kim Vinci will follow-up on whether or not letters will be drafted to the submitters on issues including Issue #'s 34233, 34289, etc.

Closing

Kim Vinci closed the meeting.

The next meeting will be Tuesday, August 2, 2016, at 1 p.m. EST.

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

Louis Vlahos has resigned from TAP.

The application phase for new members has been completed. Solicitations with information will go out next week to the applicants wanting an interview. The administrative staff is busy getting the invites out to the applicants that will be interviewed. The interview process will continue for three to four weeks. This will provide enough time to get all the applicants interviewed.

Chair Report – Elizabeth Chaney

Chaney was running a little late and Sophia Sakoff began the discussion with the approval of the minutes. Chaney joined the called and apologized for being late. She stated the Joint Committee (JC) received updates from the committees. Some committees have responses back from IRS.

Members who no longer want to participate in the TAP and quorum issues were discussed. The JC stressed to chairs to have members make sure TAP managerial approval is received prior to participating in outreach activities if they intend to receive reimbursement for mileage and/or overnight expenses. Jimerson added that if any member is looking to do any overnight travel for outreach it is very important to get management's approval because the funds are very limited for travel. It is best to let managers know a week prior to the travel in order to get proper approval.

Chaney added that there have been three members to resign from the TAP Special Projects Committee due to personal commitments. Their names are Louis Vlahos, Merry Mattson and Francesca Hary. Jimerson is working with alternates to fill the vacancies.

Approval of Minutes

May Meeting Minutes were approved with administrative changes.

- Update address for Shelby Lyon.
- Correct time of meeting indicated at the bottom of the minutes.

Member of Public

None

Program Owner

No updates provided

International Update – Shelby Lyon

Lyon stated that she has been busy looking into the issue with Taxpayers trying to file a return but are unable to obtain a Social Security Number (SSN). She is writing up a referral for taxpayers receiving a temporary SSN. It will be presented to the full committee during next month's meeting. There is a process in place for people who are adopting a child where they are able to obtain a temporary number. Continued research on whether or not Social Security has any available options is being done. Chaney added there is some new information available on the Social Security website.

Action Item: Elizabeth Chaney will email the website link to the committee with the Social Security information.

Sub Committee II – Andrew VanSingel

Collette Keeton stated a write up was going to be submitted by VanSingel on the Taxpayer efforts to get the E-transcripts. The subcommittee did speak with a SME on the issue. They are waiting to hear back with additional information.

Sub Committee III – Paul Lubell

Lubell stated the subcommittee does not have a path to pursue at the moment. William Mason added the subcommittee has agreed to meet at the regular scheduled time at the end of June. They will be looking at issues raised during the International subcommittee call to see if there are issues they have for them to pursue. The next meeting will be held on 6/28/16, at 11 a.m., EST. There was some information forwarded to the subcommittee that may need revising. The subcommittee will review during the meeting on 6/28/16.

Outreach – Sophia Sakoff

Sakoff stated that while working on the activity report, she noticed there should be numbers only inserted for total hours in the Excel spreadsheet. The letters cancels out the formulas to calculate the totals. If there are comments to be made, members are asked to put them in the correct area on the spreadsheet. This accounts for the zero totals that have been shown on some of the reports. Members are encouraged to review the forms to make sure formulas are correctly showing their actual totals. Chaney suggested that if there are hours not added during the previous month, copy and paste the hours to the current month's activity report.

The Outreach Committee that will meet every third Monday of the month. Gretchen Cooney is the chair of the committee. There are some members returning to the committee. It is going very fast and furious. There is an outreach report being pulled together. It will be part of the monthly updates and a part of the Special Projects Report. Each committee will have a separate part in the report. This will be a high level report of larger events and things people are doing. Members were encouraged to send an email message to Sakoff if there are any events to be added to the report.

- Bill participated in an Outreach event with his law firm where he spoke with 45 people.
- Mary Florence attended an anniversary event and spoke with seventy people about TAP. She also attended an IRS Practitioner Liaison meeting and was able to promote TAP. She educated taxpayers about TAP during luncheon events.
- Paul Lubell attended the Baltimore Forum in May. It was sponsored by the National Taxpayer Advocate. He is looking for feedback. Jimerson added she will follow-up with Sheila Andrews for any feedback that may have come in.

There will be a compiled summary report put together and entered onto www.TAPSpace.org. Chaney will be attending a Congressional Liaison meeting in Detroit, MI, towards the end of June.

Internal Communications update – Collette Keeton

Keeton stated that the subcommittee did meet and they received reports from TAP members. A published draft will be presented to the Chair by June 10, 2016. They are working to produce a really nice Newsletter again. Keeton will attend a TAS Congressional Seminar at the Summit Building in Atlanta, GA. Star Smith is the TAS representative who contacted the committee to participate and deliver a TAP presentation. The newsletter will be shared with the audience. Jimerson added sharing the newsletter will give the audience knowledge of who TAP is and what TAP is doing.

Action Items:

Jones stated:

- Elizabeth Chaney will email the link for the Social Security Administration for the International subcommittee on temporary Social Security numbers.
- Issue referral draft to members of Subcommittee II. Stacia Jones will follow up with Andrew VanSingel and check on the status of the referral.
- Stacia Jones will request information from IRS.
- Waiting for response from IRS. Rose Smith stated Issue 33297 **Quality of Service** was shared with the Director of Online Services. It is on his agenda to discuss on June 21, 2016.

Jimerson stated that if there are any issues that need to be entered onto the system, send to the Analyst and her. They will make sure it gets entered. Lyon added she has been chosen to work with a team to look into adding an International Local Taxpayer Advocate.

Closing

Susan Jimerson closed the meeting.

The next meeting will be Tuesday, July 5, 2016, at 1 p.m. EST.

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



**Special Projects Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
May 3, 2016**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer

Attendance

- | | | |
|---------------------|----------------------|------------|
| • Elizabeth Chaney | Lansing, MI | Chair |
| • Sophia Sakoff | Turner, OR | Vice-Chair |
| • Catherine Jeppson | Northridge, CA | Member |
| • Collette Keeton | Ellenwood, GA | Member |
| • Paul Lubell | Catonsville, MD | Member |
| • Mary Florence | Kansas City, MD | Member |
| • Shelby Lyon | Anières, Switzerland | Member |
| • William Mason | Knoxville, TN | Member |
| • Andrew VanSingel | Wheaton, IL | Member |

Members Absent

- Louis Vlahos Port Washington, NY Member

Staff

- Sheila Andrews, TAP Director
- Susan Jimerson, Designated Federal Officer
- Kim Vinci, TAP Analyst
- Stacia Jones, TAP Analyst
- Annie Gold, TAP Administrative Assistant
- Carolyn Sanders-Walsh, SBSE
- Tamikio Bohler, W&I
- Debbie Awalt, W&I
- Karen Rice, W&I
- Liz Evans, W&I
- Johnnie Beale, W&I
- Cindy Jones, W&I
- Brianne Wilner, Business Stakeholder Relations
- Tonjua Menefee, Business Stakeholder Relations

Roll Call

Annie Gold Quorum was met.

Opening/Welcome – Susan Jimerson

Susan Jimerson welcomed everyone to the meeting. A review of the agenda was shared. Francesca Hary has resigned from TAP. An attempt to select an alternate will be made. A message was received from Louis Vlahos. He is evaluating if he will be able to continue with the TAP and will have an answer within the next two weeks. If he is unable to continue, an attempt to select an alternate will be made. The Recruiting season has begun. Four hundred-fifty have

been received as of last week. The interview phase will begin June 20, 2016. Solicitation for members to be a part of the interview panel will be going out prior to the interview phase.

Sheila Andrews, TAP Director informed the committee.

- Nina Olson is scheduled to talk to the entire TAP body on Thursday, May 26, 2016 at 2 p.m. EST. There will be an invite sent out to everyone with the purpose of the session. There will be discussions on Tax Scams. Tax Scams are a good lead way to pursue new Outreach Activities. On the IRS website, www.irs.gov you can enter in the search engine “Dirty Dozen Tax Scams” the twelve most common Tax Scams will display. A presentation could be done from this article. There are a lot of people interested in Tax Scams. It is a great resource to introduce TAP.
- TAP Recruitment is going well. If anyone knows of possible interested candidates, let them know they can go online at www.USAjobs.gov to apply. The open period to submit applications closes on May 16, 2016. Interviews will be scheduled once the information has been shared with TAP from the Human Capital Office. They will retrieve candidate information from www.USAjobs.gov and provide TAP with the information. Anyone interested in participating on the interview panels are encouraged to let Sheila Andrews or Susan Jimerson know. As a current member, your input is very valuable to the selections. There are set interview questions and a TAP staff person will be assisting in the interview process. A special thank you was expressed to all members who responded to Andrew’s email soliciting assistance with the interviews.
- Solicitations for new projects have gone out and they will be refined. Some issues could come from these projects.

Chair Report – Elizabeth Chaney

Chaney informed the committee that a review of some issues and recommendations received back from IRS will be discussed during this meeting. Jimerson added, Collette Keeton participated in the Affordable Care Act (ACA) project review and would report on what was presented.

Approval of Minutes

- Face to Face Minutes were approved.
- April 2016 minutes were approved with corrections. Merry Mattson was not a participant. Kim Vinci will add Paul Lubell’s comments that the subcommittee was dropping the efforts on the International phone numbers and looking into third party authorization forms 2848. Copies of corrected minutes will be forwarded to the committee and a copy will be added to www.TAPSpace.org.

Review of IRS responses

The committee discussed the responses from IRS on the following issues:

- Issue #33297 – Quality of Service. Responses have been received for ID’s 851, 852, 853 & 854. We are still waiting for a response on ID855. Lubell brought up concerns about the responses. Mary Florence added that name and badge numbers are only stated at the beginning of a call by the representative. Adding them at the end of the call is a good suggestion. Jimerson stated that IRS doesn’t want to give the impression of getting directly back with the contact representative. The system is designed to go to the available technician and not with the original contact person. Tamikio Bohler added that employees are instructed to give their name and ID number at the beginning of a call.

The taxpayers have the right to request that the representative repeat this information at the end of the call. All information for messages is covered so there is no need to add additional comments on this matter. A suggestion was made to allow the Taxpayer an option to leave feedback at the end of the call. Paul Lubell will have a further discussion with Kim Vinci and Stacia Jones on the process for reconsideration. Andrews added that there is not enough in the response. The response may not have come directly from Sanders-Walsh. Ask for a better explanation to get clarity. When submitting a reconsideration, there must be new information included.

Action Item: Stacia Jones and Susan Jimerson will contact Carolyn Sanders-Walsh and request clarification to explain better the response and forward to the committee.

- Issue #32454 – International Issues. Responses have been received for ID’s 847, 848, 849 & 850. Shelby Lyon stated that most have been accepted. The problem is people request a passport through the embassy and it may not go through due to the tax obligation. If they are not aware of the obligation, how would they know? This is what these issues are about. The taxpayers who go into the embassy in person are sometimes notified if they have an obligation. Lyon asked if the status of how things are going would be provided to the subcommittee and if the Subject Matter Expert (SME) would be able to speak with the committee on the next call. The other three items look to be ok. The Speak-Up Brochure is with the publisher and will be made available to people. Issue 849 needs more clarity on how material or information would arrive to taxpayers regarding their tax obligations. Any possible legislative changes would have to be looked into prior to implementing a change. There are tax treaties in place for taxpayer assistance. Mary Florence added that with the banking regulations, there should not be penalties imposed on taxpayers living aboard. Andrews added this would have to be researched to see if it would impact any legislative change. There is a process where recommended legislative changes could be sent to Nina Olson. Shelby Lyon will share more information with the committee that would apply to the subcommittee for International Taxpayers.

Responses accepted:

- 32454 – ID847 implemented March 9, 2016
- 32454 – ID850
- 32454 – ID848
- 32454 – ID859 (**will not accept until more information is received**)
- 33297 – ID852

Member of Public

None

Program Owner

No updates provided

International Update –Shelby Lyon

Lyon stated the subcommittee is waiting for:

- a call back from ODVP
- contact from the Local Taxpayer Advocate with information.
- more information from the person who went through some of the issue and was able to reclaim some credits. His experience would help us and provide more information on

other issues because he had a tough time. Florence added that there are a lot of people who are not aware of these issues. Jimerson volunteered to be the contact person and will make sure the questions are routed to the appropriate area. Bohler added that the International liaison for TAC is Laura Thomas and Lola C. They are the contact persons. An email with their information will be forwarded to the committee.

Sub Committee III – Andrew VanSingel

VanSingel stated that the committee spoke with the SME last week on the issue regarding getting transcripts for cases with ID Theft issues. The subcommittee received some information on the progress of getting some of the recommendations implemented. They will continue to move forward with the issue. The subcommittee is currently in the information gathering stage. E-Services platform will provide some information on ID theft.

Outreach – Sophia Sakoff

Sakoff stated that nine reports were received reporting 60 hours of Outreach, reaching 495 people and bringing in one new issue for the month of April. Kudos goes out to the full committee. The Outreach reports, while limited to 800 characters, is really small. Sakoff requested members send her a copy when submitting their Activity Reports. She will pull out the information to condense into the combined report. If there is something anyone really wants included, make sure to send Sophia Sakoff a message and she will see that it is included in the report. Jones stressed members should make sure the dates are correct when submitting their reports and the correct number of hours is captured.

Internal Communications update – Collette Keeton

Keeton stated that the subcommittee is asking everyone to send their reports to Lisa Billups by the first Friday of the month. Committee chairs are limited to 800 characters when submitting their report. Any reports not submitted will be moved to the back. Everyone was encouraged to turn in the reports so that every committee will be represented. Keeton stated that it is great to be involved in the ACA Committee updating the Tax Law. Information regarding what has been accepted may not be available until May. Bohler will be providing the committee with more information as it becomes available.

Paul Lubell

- Issue #29423 – Online Power of Attorney. Lubell attended a meeting on April 26, 2016. There were two SMEs in attendance. Carol Walker, a senior manager who was involved in pursuing a system that allowed PIN numbers, which was moved in 2016, is no longer available. There is nothing further for this committee to work on at this time. A recommendation to discontinue the committee due to lack of projects to work and members be reassigned to another committee was shared by Lubell. Jones suggested finding a topic for the committee to work on before the recommendation to disband the subcommittee is considered.

Action item: Stacia Jones will send an email to the subcommittee with possible topics to work.

Action Items:

Jones stated:

- Obtain clarification on Issue #33297, ID852. Find out Carolyn Sanders-Walsh exact meaning.
- Shelby Lyon to send a written synopsis of what she is asking relative to Issue #32454, ID859.



- Stacia Jones will provide information to the International Communications Committee on possible topics to work.

Closing

Susan Jimerson closed the meeting.

The next meeting will be Tuesday, June 7, 2016, at 1 p.m. EST.

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

**Special Projects Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
April 5, 2016**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer

Attendance

- | | | |
|---------------------|---------------------|------------|
| • Elizabeth Chaney | Lansing, MI | Chair |
| • Sophia Sakoff | Turner, OR | Vice-Chair |
| • Mary Florence | Kansas City, MD | Member |
| • Catherine Jeppson | Northridge, CA | Member |
| • Collette Keeton | Ellenwood, GA | Member |
| • Paul Lubell | Catonsville, MD | Member |
| • Shelby Lyon | Chene Bourg, Geneva | Member |
| • William Mason | Knoxville, TN | Member |
| • Andrew VanSingel | Wheaton, IL | Member |

Members Absent

- | | | |
|------------------|---------------------|--------|
| • Louis Vlahos | Port Washington, NY | Member |
| • Francesca Hary | Riverside, OH | Member |

Staff

- Sheila Andrews, TAP Director
- Susan Jimerson, Designated Federal Officer
- Kim Vinci, TAP Analyst
- Stacia Jones, TAP Analyst
- Annie Gold, TAP Administrative Assistant
- Carolyn Sanders-Walsh, SBSE
- Tamikio Bohler, W&I
- Debbie Awalt, W&I
- Karen Rice, W&I
- Liz Evans, W&I
- Johnnie Beale, W&I
- Cindy Jones, W&I
- Brianne Wilner, Business Stakeholder Relations
- Tonjua Menefee, Business Stakeholder Relations

Roll Call

Annie Gold Quorum was met.

Opening/Welcome- Susan Jimerson

Susan Jimerson welcomed everyone to the meeting. She shared information received from public comments posted to www.improveirs.org. On March 23, 2016, five comments were received regarding e-mail requests from TAP for personal information. One of the TAP analysts reviewed the comments to see if there were issues that the TAP should look at. During the review, the analyst noticed the emails stated they received information from TAP requesting

their personal information. This included a request for their Social Security number, date of birth and credit card information. This was needed to process a refund that the taxpayers were eligible for.

The Treasury Inspector General for Tax Administration (TIGTA) was contacted along with the Administrator for www.improveirs.org and www.tapSPACE.org to determine if either system had been hacked. Fortunately, they had not been hacked. To follow-up with the situation, an alert about the scam was uploaded to the website. It is also on the www.irs.gov website under the Tax Scam tab. TIGTA advised the TAP Staff that actions taken were done correctly to proactively stop the scam from going any further.

Kim Vinci and Stacia Jones will be sending the all TAP Quarterly meeting invite scheduled for Thursday, April 28, 2016, at 2-3 p.m. EST, to everyone. There will also be information sessions that will cover TAP processes, including; "What Happens When you Owe Money to IRS" and more.

Jimerson shared staffing updates – Donna Powers will be leaving TAP on a 120 day detail beginning April 17, 2016. Megan Fees will be detailed in behind Powers.

Sheila Andrews welcomed everyone to the meeting and provided the following updates:

- The TAP Charter was signed by the Department of Treasury
- National Taxpayer Advocate, Nina Olson is holding several Public Forums.
- Gina Jones, TAP Chair attended the Forum held in Washington, DC.
- Andrew VanSingel attended the Forum held in Chicago, IL.

If anyone is interested in participating in the Harrisburg, PA Forum on April 8, 2016, let Sheila Andrews, Susan Jimerson or one of the analysts know. The attending member information will be shared with Nina Olson. Andrews encouraged everyone to try to attend the Forums in their state.

Chair Report – Elizabeth Chaney

Liz Chaney informed the committee that the TAP Chair, Gina Jones, encouraged everyone to consider using the rebuttal process if a rejected response is received for an issue and the committee is not in agreement with IRS. Keep in mind the option is there. Chaney reiterated that members are strongly encouraged to participate in the NTA Forums. All requests for over-night travel must be approved by Susan Jimerson prior to travel. The committee's monthly Activity Reports are due by the twenty-fifth day of each month. The 2015 TAP Annual Report is being put together. Chaney stressed the importance of all members attending committee meetings. It is necessary to be able to effectively work issues and complete referrals.

Member of Public

None

Program Owner

Debby Awalt inquired on whether the international sub-committee issue is taxpayers needing a social security number or an ITIN. Requests for subject matter experts or any questions should be sent to her attention. She deals with ITINS along with Roula Karavitis and Laura Thomas.

International Update –Shelby Lyon

Lyon stated the subcommittee is working on obtaining social security numbers for taxpayers who are eligible and are living abroad. They are looking at solutions and are still in the fact gathering stage. Taxpayers who do not have a social security number are not able to file a tax return or make a payment. Lyon will try to obtain more information on what is actually happening as she does more outreach. She is also looking at gathering more information regarding international telephone number access and taxpayers' international mailing address. Chaney added the Country and City codes are being noted on the individual's tax return. William Mason pointed out there is a section to address the foreign address on the tax form. Debby Awalt added that the TIGTA Audit included information regarding both telephone numbers and addresses. The IRM has also been updated. The Commissioner for Wage and Investment, Debra Holland, sent a letter out to the Operating Division in IRS to refer to the IRM and the guidelines. The committee will be looking at brochures that are coming out this year.

International Communications Sub Committee

Lubell stated that the subcommittee was dropping the efforts on the International phone numbers and looking into Form 2838, Third Party Authorization.

Sub Committee III – Andrew VanSingel

VanSingel stated the committee is working on Issue 31300, Power of Attorney on file, involving practitioners who are not able to get transcripts from the E-Services platform online for clients who have identity theft indicators on their account. There will be more information to report on the next call. The first subcommittee call has been scheduled for the third Thursday of the month. They are anticipating having a Subject Matter Expert (SME) on the call to gather more background information. Debby Awalt assured the committee if a SME is needed let Susan Jimerson know and one will be assigned to be on the call.

Outreach – Sophia Sakoff

Sakoff stated that not all reports are in. She has been trying to make contact with those that are missing. If there are any problems or issues let her know and she will assist with the issue. There will be more to come on Outreach ideas.

Chaney added that she is excited that she was able to get in contact with her LTA. She attended a Congressional meeting and was able to go visit a Low Income Tax Clinic.

Mary Florence stated she contacted her Local Taxpayer Advocate (LTA) and a representative from SBSE. She will be meeting with some politicians. A talking point would be "Taxpayers who are eligible for the Earned Income Credit but are not filing for it". She would like to have some information on this area so she has the knowledge to discuss. Andrews added TAP is advocating for Taxpayers but not advising them on their tax issues. We can explain the law but anything more is not in the TAP scope. VanSingel suggested Mary contact the Low Income Tax Clinics. Pub. 4144 will provide a list of their addresses.

Sakoff added that she met with her LTA. There were politicians there and they did not know that TAP existed. TAP is a resource for their constituents. Chaney stated that she also provided information regarding TAP's availability to do research on issues.

Internal Communications update – Susan Jimerson

Jimerson stated the first meeting is scheduled for April 19, 2016 at 12:00pm EST. Volunteers to this committee have received the invites for the meeting. A Chair will be elected for this committee during the scheduled meeting. They will also determine who will work on what issue within the committee for the duration of the year. They are working on getting the Newsletter

started up again. Solicitations may be coming out to members requesting current updates on Project committees. The 2014 Annual Report is at the Publishers office. The 2015 Annual Report is in progress to be produced.

Action Items:

Kim Vinci stated:

- Get a SME for Subcommittee III. Stacia Jones, Susan Jimerson and Kim Vinci will work to get this completed.
- Contact Debby Awalt and obtain information for Subcommittee II.

Jones expressed her thank you and appreciation to all who turned in their Activity Reports. Everyone was reminded to copy Vinci and Jones when submitting the reports. The reports should be turned in even if there is no activity to report.

Paul Lubell asked if there we have received any responses from IRS for last year's referrals. Vinci stated that a partial response was received on the referral submitted by Quality of Service. No response on the International referral. Copies of the responses that have been received will be sent out to the committee for discussion at the next subcommittee meeting.

Jimerson suggested that if the subcommittees will not be working on their current issues, the committee will decide on how to divide up the issues to work. At the next committee the decision will be made.

Closing

Jimerson closed the meeting.

The next meeting will be Tuesday, May 3, 2016 at 2 p.m. EST.

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

**Special Projects Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
March 3-4, 2016**

Designated Federal Officer

- Sheila Andrews, Designated Federal Officer (acting)

Attendance

- | | | |
|--------------------------|---------------------|------------|
| • Elizabeth (Liz) Chaney | Lansing, MI | Chair |
| • Mary Florence | Kansas City, MO | Member |
| • Catherine Jeppson | Northridge, CA | Member |
| • Collette Keeton | Ellenwood, GA | Member |
| • Paul Lubell | Catonsville, MD | Member |
| • Shelby Lyon | Chene-Bourg, Geneva | Member |
| • Bill Mason | Knoxville, TN | Member |
| • Sophia Sakoff | Turner, OR | Vice-Chair |
| • Andrew VanSingel | Wheaton, IL | Member |

Members Absent

- | | | |
|------------------|---------------------|--------|
| • Francesca Hary | Riverside, OH | Member |
| • Louis Vlahos | Port Washington, NY | Member |

Staff

- Kim Stewart, Executive Director Systemic Advocacy
- Sheila Andrews, TAP Director
- Kimberly Vinci, TAP Analyst
- Donna Powers, TAP Analyst
- Stacia Jones, TAP Analyst (detailed in)

Opening/Welcome

Sheila Andrews and Kim Stewart welcomed everyone to the meeting. Andrews opened the meeting as DFO. The meeting started with an icebreaker, during which all the participants introduced themselves and talked about something interesting from their childhood, their professional life, and something they would like to do or have. Andrews reviewed the TAP Mission statement and recommended that the panel use the statement as their guide when considering issues and submitting referrals.

Kim Vinci reviewed TAP Member procedures, including the ground rules for meetings. Minutes are taken during the monthly meeting and the committee must have quorum to be approved. The agenda and any pre-read material for the full committee meetings are sent out about a week before the meeting to the committee and will be available on www.TAPSpace.org. Activity reports were discussed during training yesterday (March 2, 2016) and if anyone has any questions, they should contact Kim Vinci. The reports will be sent to everyone once they are finalized. Communication will be primarily via

conference call and email. The full committee will meet once a month and the subcommittees will meet as needed.

Chair/Vice-Chair positions and election

The TAP chair is Gina Jones, and the TAP vice-chair is Gretchen Cooney. Andrews explained that Gina Jones has set up a meeting for the committee chairs and vice-chairs for March 16, 2016, at 1 p.m. EST. Vinci went over the responsibilities of the committee chairs. They work with the joint committee, are the spokesperson for the committee, participate in joint committee calls, and must attend the virtual joint committee meeting (2 days). The vice-chair works with the chair, and if the chair is unavailable, the vice-chair assumes the duties. The vice-chair completes the outreach reports, serves as outreach coordinator, and participates on a monthly outreach call. The chair and vice chair were elected as follows:

Chair – Elizabeth Chaney

Vice-Chair – Sophia Sakoff

Approval of Minutes

Liz Chaney reviewed the minutes of the November 2015 meeting and took a vote for approval. Sakoff made a motion to approve the minutes. The motion was seconded, and the minutes were approved.

Conference Call Meeting Dates and Times

The committee will have quorum with seven members. The full committee meeting is scheduled for the first Tuesday of each month at 1-2 p.m. EST. The first meeting is scheduled for Tuesday, April 5, 2016 at 1-2 p.m. EST.

Subcommittees

Subcommittees were established as follows:

- International Subcommittee – Shelby Lyon, Cathy Jeppson, Sophia Sakoff, Mary Florence
- Subcommittee #2 – Paul Lubell, Liz Chaney, Bill Mason, Francesca Hary
- Subcommittee #3 – Andrew VanSingel, Collette Keeton, Louis Vlahos
- Screening Committee – Bill Mason, Paul Lubell, Cathy Jeppson
- Quality committee – Mary Florence, Sophia Sakoff
- Internal Communications – Collette Keeton
- Outreach – Sophia Sakoff

2015 Recommendations

Paul Lubell provided a summary of the referral submitted by the Quality of Service subcommittee. Shelby Lyon provided a summary of the referral submitted by the International subcommittee. Vinci stated that we are still waiting on a response from IRS on both referrals.

Focus Group/Future State of IRS

Andrews had the committee break out into three focus groups to review the vignettes on the Future State of the IRS. The groups then provided written feedback, including ideas for improvement and concerns.

Screening and New Issues

The committee screened 25 issues. Issue 33798 was referred to the Taxpayer Communications Committee. Issue 32714 was referred back to the Notices and Correspondence committee. The committee agreed to work Issue 31300 and Issue 29423 remains in the Parking Lot. All other issues were dropped because they were either legislative issues or individual issues not within TAP's purview. In addition, the committee agreed to take up an issue in which IRS systems don't show international phone numbers and addresses in correct format. The General International subcommittee will look at the difficulties American taxpayers living abroad are having when trying to meet their filing requirements. The committee is currently looking at three issues.

Travel

Florence asked about expense reports and Andrews explained that the reports would be mailed to the committee members. They must be returned as soon as possible. The travel itinerary must be included with the report, and any expense for \$75 or more must be accompanied by a receipt.

International Issues/Subject Matter Expert (SME)

Shelby Lyon read an article about the difficulties US citizens encounter when trying to get a social security number while living abroad. Dean Burke from the Large Business & International (LB&I) operating division, called in and discussed steps being taken to assist international taxpayers. He is in the process of creating video webinars to send overseas regarding streamline filing. The first two will air on May 10, 2016 and May 25, 2016. Lyon raised the issue of the difficulties American citizens are having obtaining SSNs. Dean will talk with his contacts at the Social Security Administration and also look into the possibility of issuing a temporary number to these taxpayers. He asked that Lyon submit specific questions that address her concerns and he will get back to the committee with answers. He is looking at various methods of engaging the international taxpayer (webinars, videos, virtual meetings, brochures, etc.) He has developed a booklet with information that international taxpayers can use, and will send the brochures, booklets to Vinci by Monday or Tuesday for review by the committee.

Subcommittee Focus Groups/Report Out

The General International Subcommittee (Shelby Lyon, Sophia Sakoff, Mary Florence and Cathy Jeppson) discussed the problems encountered by taxpayers trying to get an SSN. They wanted to know if a taxpayer can make a payment without an identification number. Jeppson will send an information request to Stacia Jones and Kim Vinci. Their meetings will be on the fourth Wednesday of the month at 11:30 a.m. EST.



The E-Services Subcommittee (Andrew, Collette, Louis) discussed the difficulties practitioners have in securing transcripts for taxpayers whose accounts have been flagged for ID theft. They want to discuss program limitations with a SME who deals with this issue. They will speak again at the end of the month, but want to include Louis before setting up a monthly call.

The International Communications Subcommittee looked at two issues: incorrect formatting of international telephone numbers and foreign addresses. They decided to leave the address issue in the parking lot, and focus on the telephone numbers. They found that the Treasury Inspector General for Tax Administration (TIGTA) had already prepared reports on this issue, and will work on securing this information. Their next call will be on Tuesday, March 29, 2016 at 11 a.m. EST. The monthly call will be on the last Tuesday of each month at 11 a.m. EST.

Closing

Liz Chaney thanked the subcommittees for their hard work and the members for voting her in as chair. Andrews closed out the meeting by thanking everyone for their work and let the committee know that the TAP staff is available to provide assistance.

Next Meeting will be on April 5, 2016 at 1 p.m. EST

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