



2018 Meeting Minutes Special Projects Committee

- March 19-20, 2018
- April 18, 2018
- May 16, 2018
- June 20, 2018
- July 18, 2018
- Aug.15, 2018
- Sept. 19, 2018
- Oct. 17, 2018
- Nov. 21, 2018

Special Projects Committee Taxpayer Advocacy Panel (TAP) Face-to-Face Meeting Minutes March 19, 2018

Designated Federal Officer

- Susan Jimerson Seattle, WA Chief, TAP West

Attendance

- Florence, Mary Kansas City, MO Member
- Mason, Kimberly Chicago, IL Member
- Petersen, Kristen Colorado Springs, CO Member
- Russell, Richard Owens Cross Roads AL Member
- Sewald, Marco Nidderau, Germany Member
- Mosely, Tiffany Hollywood, CA Member
- Williams, Cheryl Shelton, WA Member

Members Absent

- Manasa, Harold Hendersonville, NC Member

Members Attending Virtually

- Brookens, Michelle Taylorville, IL Member
- Weeks, Juliana Blythewood, SC Member

Staff

- Matthew O'Sullivan TAP Analyst
- Lisa Billups TAP Analyst



- Gilbert Martinez
- Annie Gold

TAP Analyst
TAP Secretary

Member of Public

- Creggett, Kathleen San Pablo, CA Member

Opening/Welcome/Announcements

Jimerson welcomed everyone to the meeting. This is the first official meeting for Special Projects Committee in this TAP Year 2018. Jimerson went over the agenda. Introductions of staff and members followed the announcements.

Jimerson covered the TAP Mission PowerPoint presentation.

TAP Staff Roles and Responsibilities Discussion – Matt O’Sullivan

- Methods of Communication
- Ground Rules and Telephone Etiquette
- Minutes/Minutes Approval
- Establish Meeting Quorum
- Consensus

Annie Presentation – Building Logistics

Chair Presentation

O’Sullivan presented information about the chair and vice chair of the Special Projects committee, as well as subcommittee leads. Chair elections followed the presentation. Mary Florence was nominated by Sewald and approved by all members, and she was elected chair. Florence nominated Kristen Petersen and approved by all members, and she was elected vice chair.

Minutes Approval

Correction by Petersen listed as not attended removed/already listed as attended. Petersen made a motion to approve November 2017 Minutes; approved and accepted by Members.

No Public Comments

No representative from public present today.

Meeting Dates and Times

Described Quorum (6 minimum) and Consensus (majority rules)

Full Committee Schedule

Third Wednesday of each month at 2-3 p.m. ET

Subcommittee International Schedule



Second Wednesday at 2 p.m. ET.

International Subcommittee Members:

- Marco Sewald
- Tiffany Mosely
- Kristen Petersen
- Mary Florence
- Harold Manasa

Subcommittee ID Theft Schedule

Second Wednesday at 3 p.m. ET.

ID Theft Subcommittee Members:

- Richard Russell
- Michelle Brookens
- Julianna Weeks
- Cheryl Williams
- Kimberly Mason

Activity Reports due the 25th of each month

Screening Committee Schedule

New Issue Screening Committee Team

- Michelle Brookens
- Kimberly Mason
- Richard Russell

Quality Committee Schedule

Quality Review Committee

- Marco Sewald
- Michelle Brookens
- Julianna Weeks
- Cheryl Williams

Outreach Committee – Kristen Petersen (Vice Chair)

Schedule: Dates and times to be determined.

Internal Communication Committee

- Tiffany Mosely
- Kristen Petersen



Internal Communications Committee Schedule: Dates and times to be determined.

- Role of W&I TAP Liaison: Attend all Project Committee Calls; clarify and forward all TAP questions; identify SME within W&I; solicit W&I topics for TAP Review; monitor status for actions; attend annual TAP Meetings; share information regarding Most Serious Problems (MSP) Topics.

Recommendations from W&I Liaison for the FY 2018

- Utilize our SMEs prior to the development of recommendations.
- Utilize the web for links to important data (previously shared with TAP).
- Notify us about upcoming conference calls in advance when requesting an SME.
- When submitting request for reconsiderations, please address the IRS response provided in the original recommendation. It helps if TAP explains why the current language is not sufficient. State what has changed or why the current response is unacceptable.
- Review IRS approved topics and if working across committees, please share information that the IRS shares with the other groups so that everyone has received all the input provided by IRS prior to working the topic.
- Be cognizant of our timelines. TAP has been doing a great job in this area:
 - 60 days to respond to W&I TAP Issues/Recommendations Submitted for IRS (W&I) to Consider
 - 30 days for requests for reconsideration
 - 30 days for general TAP questions
 - A few days (not designated) for finding W&I SMEs
- Use the attached website links to research requested information. This is a great go-to guide.



Resource Links for
TAP Members (2018).

- Use the attached website links/file and conduct searches on topics being worked by TAP and pay attention to the following items listed on the form:
 - Future State: Use that language to justify TAP recommendations.
 - IRS Government Accounting Office (GAO) report: State what the IRS said it would do that supports the TAP Recommendation. It is kind of difficult to reject a recommendation that addresses what we said we would do.
 - Hot News: Show that the TAP Recommendation (when appropriate) is obviously an issue that the IRS needs to address.
 - IRS statements and announcements: Read and conduct searches on TAP topics to see our latest statements that may support or justify the recommendation being developed by TAP.

Project Committee Information

Review of 2017 Recommendations:

- Issue 35185 – International Future State
 - Response from IRS received on Jan. 18, 2018
 - Committee went over response; IRS has made some progress – under consideration
 - Follow-up date June 30, 2018
- Issue 36509 – Get Transcripts
 - Response from IRS received on Jan. 18, 2018
 - Committee went over response – under consideration
 - Follow-up date Jan. 31, 2019
- Issue 35080 – Transcript Function Not Working with Foreign Address
 - Response from IRS received on Feb. 22, 2018
 - Committee went over response – not adopted (international phone number is not toll-free)
 - Closed as response accepted – it is working thanks Sewald
- Issues 32455 and 34586 – Identity Theft
 - No response from IRS
- Issue 35609 – Google Listings
 - IRS is considering the referral
 - Their response due date is January 31, 2019
- Issue 34929 – Update Streamline Filing Compliance Webpage
 - ID 986
 - Went over response – IRS agreed to recommendation committee accepted IRS response
 - ID 987
 - Went over response IRS agreed to recommendation committee accepted IRS response.
 - ID 988
 - Went over response IRS agreed to recommendation committee accepted IRS response
 - ID 989
 - Went over IRS response IRS indicated the problem was resolved. Committee accepted IRS response pending verification that issue is resolved
 - ID 990
 - Went over response IRS agreed to recommendation committee accepted IRS response
 - ID 991
 - Went over IRS response IRS indicated the problem was resolved. Committee accepted IRS response pending verification that issue is resolved

Screening Report

- Issue 36378 – Tax Refunds
 - Accepted into ID Theft subcommittee to get more information from SMEs

- Issue 36380 – 1099 Filers
 - Not sure the benefit of pursuing this recommendation, does not seem to fit our purview; issue not accepted into TAP
- Issue 36489 – Suggestion to Reduce Bogus Tax Refunds
 - Discussion current system seems to work; discussion on using other options vs AGI – Accept in ID Theft subcommittee
- Issue 36550 – Mandatory IP PIN Issuance
 - Discussion to research if an IP PIN can be requested by anyone at any time – need IRS SME to respond to their current process – refer to Tamikio Bohler
- Issue 36667 – Help Issues and Communication
 - Referring to Taxpayer Communication Committee
- Issue 36671 – SS-4 Form
 - Considering – verifying if true
- Issue 36684 – Tax Return Should be Public Domain
 - Not accepted/rejected
- Issue 36716 – Email-
 - Not accepted/rejected – giving TIGTA information
- Issue 36903 – Broken Links and Processes on the IRS Website
 - Referring to Taxpayer Communication Committee; need clear information as to why someone is not able to setup an online Payment Plan
- Issue 37111 – Receipt of F911 and Conformation of Results
 - Need clarification; we will consider once clarification received; verified it is an issue
- Issue 37145 – Taxes – not accepted; closed
- Issue 37192 – IRS Online List of Frequently Asked Questions
 - Refer to Taxpayer Communication Committee

On Inventory Report – Parking lot issue closed – IRS moving to a future state

Subcommittee Focus Groups

International Subcommittee

- Tiffany Mosely selected as subcommittee lead
- Not having access to tax preparers – research to see if there is enough access to taxpayers living abroad
- Form 1040PR – issues with e-file, some paper filed vs. e-file capability
- Issue of passport revocation – service moving towards moving to revoke passports
- O’Sullivan will vet all issues before proceeding
- Members Present: Tiffany Mosely (Lead) Mary Florence, Kristen Petersen, Marco Sewald
- Members Absent: Harold Manasa
- Analyst: Matthew O’Sullivan

- Issue 35050 – Delay in ITIN and Refund
 - There are problems with taxpayers having to submit original documents to the IRS for review as part of the application process. This can cause lost documents and put the taxpayers in a bad position if there are delays or original documents are lost. The subcommittee wanted more information on this matter, what the current process is, how long it takes etc. We reviewed a copy of the instructions to the W-7 application form. The form indicates that either original or certified copies are adequate. However, on the document it is written as ORIGINAL or certified copies. This could create some confusion as it seems to place an emphasis on submitting original documents. This also would seem to run contrary to IRS policy on other notices. When the IRS requests documents for collection or examination related matters, taxpayers are advised to send copies, not original documents. This may leave an opening for a suggestion to revise the form and/or instructions. This is also an issue indicated on the NTA Annual Report Most Serious Problems.
- Issue 35733 – Help for International Taxpayers
 - This is a concern about the limited information and options available for taxpayers residing outside of the U.S. who are seeking assistance with their tax preparation. There was a discussion as to whether or not this might belong with the Taxpayer Communications Committee. However, the subcommittee would like more information concerning the current status of this matter. What is the current extent of outreach being done to provide information to these taxpayers? There is currently a tab on IRS.gov which does provide a listing of qualified preparers by country. (EA, CPA, ATTY etc.) The individuals listed provide their information to IRS including verification of their qualifications.
- Issue 36302 – PUERTO RICO TAX ISSUE
 - There is a concern reported by filers of Form 1040PR for taxpayers from Puerto Rico filing returns claiming self-employment income and reporting self-employment tax taxpayers who claim additional tax credit; taxpayers who need to claim a credit for excess social security withholding back; taxpayers who need to pay household taxes, among others. When they attempt to file electronically, the returns are rejected and they have to file paper returns. The subcommittee would like more information on this matter, is this still a problem. Can we get information on the number or paper vs e-filed returns in PR?
- Potential New Issue Passport Revocation Program
 - The subcommittee is considering submitting an issue on this as it is included in the NTAs MSPs for this year. We will need additional

research into the requirements of the program and number of taxpayers impacted.

ID Theft Subcommittee

- Subcommittee Members Present: Michelle Brookens, Kimberly Mason, Richard Russell, Juliana Weeks, Cheryl Williams
- Subcommittee Members Absent: None
 - Cheryl Williams selected as subcommittee lead.
 - Identified 3 New Issues to work Issue 36378 – Tax Refunds, and combined Issue 36489 – Suggestion to Reduce Bogus Tax Refunds and Issue 37026- Prevention of Identity Theft Relating to Refunds
 - Issue 37026 – Prevention of Identity Theft Relating to Refunds – ID Theft subcommittee
 - Request SME from W&I Program Liaison – current IP PIN requests – eligibility; who qualifies; can anyone request an IP PIN? Policy around issuing an IP PIN and why are their limitations around IP PIN?
 - Members will research Identity Theft website
 - Analyst – look for any related MSPs in any ARC
 - Clarification around a request to issue a paper refunds only – TAP focus on better protections.
 - The Analyst will request a SME to provide information on the Policy for Future State Program.
 - Issue 36489 – Suggestion to Reduce Bogus Tax Refunds- discussion current system seems to work; discussion on using other options vs AGI – accept in ID Theft subcommittee
 - Issue 36378 – Tax Refunds – accepted into ID Theft subcommittee to get more information from SMEs
 - How often is a tax return filed with a different address following year? How often does address change? If something has changed, i.e. address marital status.

Here are the questions the subcommittee came up with for the issues we were given:

1. We've decided to tackle Issue 36489 – Suggestion to Reduce Bogus tax refunds – and Issue 37026 – Prevention of Identity Theft Relating to Refunds – together. We need to know:
 - a. What happens during the IRS PIN process?
 - b. Who is eligible for one?
 - c. Why are there limitations, as far as issuing them?
 - d. What's the process (policy-wise)?



- e. We already have the technology to prevent it in FL, GA and Washington DC, why not all states and territories?
2. We've decided to treat Issue 36378 – Tax refunds – separately. We need information on the following questions:
 - a. How often is a tax return's address different from one year to the next?
 - b. Where are you in the process of verifying and validating data?
 - c. Could you use private industry practices to make yours better?
 - d. Why are we behind the technology curve?

O'Sullivan will send out monthly meeting reminders for all three monthly meetings, Full Committee, International Subcommittee and ID Theft Subcommittee.

TAPSpace, WebEx – O'Sullivan

O'Sullivan and Jimerson did a demonstration on locating files and folders on TAPSpace. They also discussed and demonstrated the use of WebEx.

Travel – Gold

Gold answered questions regarding member travel home. Reviewed process for providing expense report and preparation of the members travel vouchers for reimbursement

Round Table

- Things went well today; very productive
- Please complete monthly Activity Reports by the 25th

Jimerson closed the meeting.

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



**Special Projects Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
April 18, 2018**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer

Attendance

- | | | |
|---------------------|----------------------|------------|
| • Michelle Brookens | Taylorville, IL | Member |
| • Mary Florence | Kansas City, MD | Chair |
| • Harold Manasa | Hendersonville, NC | Member |
| • Kimberly Mason | Chicago, IL | Member |
| • Tiffany Mosley | West Hollywood, CA | Member |
| • Kristen Petersen | Colorado Springs, CO | Vice Chair |
| • Juliana Weeks | Blythewood, SC | Member |
| • Cheryl Williams | Shelton, WA | Member |

Members Absent

- | | | |
|-------------------|-----------------------|--------|
| • Richard Russell | Owens Cross Roads, AL | Member |
| • Marco Sewald | Nidderau, Germany | Member |

Staff

- Susan Jimerson, Acting TAP Director
- Matthew O’Sullivan, TAP Program Analyst
- Antoinette “Toni” Ross, TAP Program Analyst
- Tamikio Bohler, Wage and Investment (W&I)
- Debra Awalt, W&I
- Annie Gold, TAP Administrative Assistant

Roll Call

Quorum was met.

Opening/Welcome – Susan Jimerson DFO

Susan Jimerson welcomed everyone to the call. The recruitment period has begun. It opened on March 23, 2018, and will run through April 27, 2018. Members and alternates are being recruited from the following states: Alaska, California, Hawaii, Kentucky, Massachusetts, Michigan, New Hampshire, North Dakota, New York, Oregon, Pennsylvania, Rhode Island, Texas, Vermont and Wyoming. In addition to these states, alternates will be sought in Colorado, Washington DC, Delaware, Kansas, Ohio, South Dakota, Virginia and Washington State. Member were encouraged to share the information concerning the recruiting when doing outreach. The information is posted on www.Improveirs.org. The interviews will begin June 4, 2018, through



June 29, 2018. Solicitations have been sent out to members for participation on the Interview Panel. The Interview panels are made up of one TAP member and one TAP staff person. The member would represent the TAP member view of what goes on in the TAP interview process. The hours are 8 a.m. to 5 p.m. ET. Members who are interested in participating in one or more slots should send interest to Jimerson or the analyst, Toni Ross. On April 6, 2018, Cedric Jeans sent out a solicitation for input on the TAP face-to-face meeting in the form of a survey. Responses are due by April 25, 2018. All input is valuable. The information is used in planning for the next year's face-to-face meetings. Members were encouraged to complete the survey.

The Joint Committee's first meeting will be held on April 25, 2018, at 1 p.m. ET. A vote to determine a new date for the monthly Joint Committee calls will be conducted at that time. Members are encouraged to call and listen in on the meeting. Toni Ross sent out the invitation for the Internal Communications Committee calls. The first meeting is scheduled for April 24, 2018. Volunteers who have agreed to participate are asked to be in attendance. The selection of the chair will be done during this meeting and prepare the agenda. The 2017 TAP Annual Report has been sent out to each member. Let the analyst know if you do not receive it in the mail. Members were encouraged to turn in their Activity Reports. The reports are due on the twenty-fifth of each month.

Approval of Minutes

2018 face-to-face minutes approved.

Chair Report – Mary Florence

Mary Florence encouraged members to keep track of upcoming meeting dates. Every member is welcome to join any of the meetings. Member participation in the meetings were encouraged. Matthew O'Sullivan sent a message to members advising of another Special Projects committee being formed.

Screening Committee Update

Issue 37111 was left over from last month and has not been reviewed by the Screening Committee. O'Sullivan added the Screening report was sent out to the Screening Committee. He received a message from the submitter who stated his issue was on an individual tax matter. A response was sent to the submitter advising him the issue was not in the scope of the TAP. He was supplied the National Taxpayer Advocate's (NTA), Nina Olson's, contact information. O'Sullivan shared all five issues were legislative issues.

Decision: The full committee Consensus to accept closing issues on the report.

Members of Public

None



Subcommittee Updates

Identity Theft – Cheryl Williams stated she has not had a chance to do any work on this issue due to the tax season.

Issue 32455, Enhancement to IRS Website on Identity Theft – Williams hasn't had the opportunity to look at it yet.

International Subcommittee

Tiffany Mosely said the subcommittee had a meeting on last week. They have three active issues and one new issue on the Passport program. It is a broad issue limiting taxpayers living abroad having limited access. Marco Sewald is working to formulate a narrower issue from it. Currently, the subcommittee is in the initial information gathering process. Florence shared the encouragement to have international support amongst members.

Outreach – Mary Florence

Kristen Petersen reminded members to turn in the Activity Reports. She will be following up with members who fail to get their reports in on time. The reports are due by the 25th of each month. Petersen stressed the importance of getting 100 percent participation in outreach. She will send out tips and ideas for outreach. Members were encouraged to keep track of hours on a weekly basis or write it down as it is done to make it easier to complete the report timely. Copies of the report should be sent to O'Sullivan, Petersen and TAP email address. O'Sullivan will send out a message to the full committee with who should get copies of the report. If anyone has questions or problem with completing the report don't hesitate to contact Petersen or O'Sullivan. Petersen mentioned information from a press release she will send out to members to read.

Action Items

O'Sullivan stated the following action items:

- Send the TAP email address out to members
- Contact W&I on Preparer Tax Identification Number (PTIN) process for information
- Work on getting Subject Matter Expert (SME) to speak to committee
- Seek answers for questions from International Subcommittee

Closing

Jimerson closed the meeting.

**Next Meeting: Wednesday, May 16, 2018
2 p.m. ET, 1 p.m. CST, 12:00 p.m. MT, 11 a.m. PT**

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



**Special Projects Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
May 16, 2018**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer (DFO)

Members Present

- | | | |
|---------------------|-----------------------|------------|
| • Michelle Brookens | Taylorville, IL | Member |
| • Mary Florence | Kansas City, MO | Chair |
| • Harold Manasa | Hendersonville, NC | Member |
| • Kimberly Mason | Chicago, IL | Member |
| • Tiffany Mosley | West Hollywood, CA | Member |
| • Kristen Petersen | Colorado Springs, CO | Vice Chair |
| • Richard Russell | Owens Cross Roads, AL | Member |
| • Juliana Weeks | Blythewood, SC | Member |
| • Cheryl Williams | Shelton, WA | Member |

Members Absent

- Marco Sewald Nidderau, Germany Member

Staff Present

- Terrie English, TAP Director
- Susan Jimerson, Designated Federal Officer
- Matthew O'Sullivan, TAP Program Analyst
- Antoinette Ross, TAP Program Analyst
- Debra Awalt, Wage and Investment (W&I)
- Annie Gold, TAP Administrative Assistant

Roll Call

Quorum was met

Opening/Welcome – Susan Jimerson DFO

Susan Jimerson welcomed everyone to the call. She gave a review of the Agenda. The Recruitment Period has closed effective May 11, 2018. The applications are with Human Capital Office (HCO) who will be doing the ranking. This is to establish the best qualified list. Fred Smith is the Lead Analyst for the recruitment process. He will be putting the list together for the interview panels and will be contacting each member who has volunteered to participate on the interview panels. Information will go out to the best qualified applicants to go onto the system and schedule their interview time slot. More information will be sent out to each volunteer on when the interviews have been scheduled. Members were encouraged to volunteer to participate on the panel if they have not done



so. Interviews are tentatively scheduled to begin on June 4, 2018, and ending on June 29, 2018. The hours for the interviews will be between 8:00 a.m. ET and 5:00 p.m. EST.

- The Quarterly All TAP Meeting is scheduled for May 24, 2018. It will begin at 2:00 p.m. EST. This is a virtual meeting and invites will be sent out.
- The Joint Committee (JC) will have their monthly meeting on Thursday, May 31, 2018. Members were encouraged to join in on the call. The JC is made up of the TAP Chair and Vice Chair, the Chair and Vice Chair of each of the project committees and the Chair of the Internal Communications Committee (ICC). They are the voting members for the committee.
- The ICC had their first meeting on April 24, 2018. They finalized the first Newsletter of this year. It is scheduled to be posted and sent out by the end of the week.

National Office Update – Terrie English

Terrie English welcomed everyone to the call. Members were assured information to attend the JC's Face to Face Meeting will be sent out to the Chair person. Members were encouraged to attend virtually. The JC Face to Face meeting is scheduled for July 9, 2018 through July 12, 2018. The details for locations and hotel accommodations are being arranged.

Approval of Minutes

April 2018 minutes approved.

Chair Report – Mary Florence

Mary Florence stated she completed the first Newsletter article with a copy to the subcommittee Chairs for any editions or corrections. The ICC will look to the subcommittee Chairs for article submissions.

Screening Committee Update

Michelle Brookens stated **Issue 37112, Issuance of ID Protection ID PIN** falls in the arena of the Dual Factor Verification for transcripts issue. It was suggested the Identity Theft Subcommittee may want to work. Brookens believes the Screening Committee will look further into this issue. Matthew O'Sullivan will follow up on getting a Subject Matter Expert (SME) to speak on this issue to the Screening Committee. Debra Awalt added the SME will be from Online Services. Paul Wight will be the person speaking with the Screening Committee.

Jimerson suggested the issue be assigned to Identity Theft subcommittee. Brookens added she agreed with O'Sullivan on Issue 37391 will be assigned to Tax Forms and Publications. The other issues the Screening Committee has are personal issues. O'Sullivan responded to the submitters with his contact



information. He also provided Taxpayer Advocate Service (TAS) contact information if there was a hardship involved.

Members of Public

None

Subcommittee Updates

Identity Theft

Cheryl Williams stated the subcommittee agrees with IRS on Issue 32455, Enhancement to IRS website on Identity Theft. The topic is sufficiently covered on www.IRS.gov. The subcommittee recommended this issue be closed.

International Subcommittee

Tiffany Mosely the subcommittee has three open issues.

- International taxpayers having access to taxpayers (Having access to taxpayer services)
- Delays in Refunds (This relates to problems with the processing of W-7 Forms)
- Accepted Electronic Filing issue (There was an issue relating to e-file from Puerto Rico, however, it was closed)
- Work through a new issue (This relates to a possible issue concerning passport revocation)

Mosely stated during the subcommittee's last meeting they received a response from IRS. They agreed with IRS and their recommendation is to close the issue. Next meeting will be working on the remaining issues.

Outreach – Kristen Petersen

Kristen Petersen reminded members to turn in the Activity Reports and they are due by the twenty fifth of each month. She reiterated write it down as it is done to make it easier to complete the report timely and it will help to not forget. She will continue to send out reminders to everyone along with tips and ideas for outreach. There is a picture of some of the members to be placed in the Newsletter. If there are any questions members are encouraged to contact Petersen. Copies of the report should be sent to O'Sullivan, Petersen and TAP email address.

Action Items:

O'Sullivan stated the following action item

- Drop issue items agreed upon from the Screening Report.
- Reach out to the SME to speak with the Screening Committee.
- Contact W&I on Preparer Tax Identification Number (PTIN) process for information.
- Work on getting SME to speak to Committee.
- Seek answers for questions from International subcommittee



Jimerson reminded the Committee Antoinette Ross is the Backup Analyst for this committee. If O'Sullivan is not available, Ross will be able to answer or assist where needed.

Closing

Susan Jimerson closed the meeting.

**Next Meeting: Wednesday, June 20, 2018
2:00 p.m. ET, 1:00 p.m. CT, 12:00 p.m. MT, 11:00 a.m. PT**

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



**Special Projects Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
June 20, 2018**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer (DFO)

Members Present

- | | | |
|-------------------|-----------------------|--------|
| • Mary Florence | Kansas City, MO | Chair |
| • Harold Manasa | Hendersonville, NC | Member |
| • Kimberly Mason | Chicago, IL | Member |
| • Tiffany Mosley | West Hollywood, CA | Member |
| • Richard Russell | Owens Cross Roads, AL | Member |
| • Juliana Weeks | Blythewood, SC | Member |
| • Cheryl Williams | Shelton, WA | Member |

Members Absent

- | | | |
|---------------------|----------------------|------------|
| • Michelle Brookens | Taylorville, IL | Member |
| • Kristen Petersen | Colorado Springs, CO | Vice Chair |

Staff Present

- Terrie English, TAP Director
- Susan Jimerson, Designated Federal Officer
- Antoinette Ross, TAP Program Analyst
- Debra Awalt, W&I
- Pamala Lowe, W&I
- Annie Gold, TAP Administrative Assistant

Roll Call

Quorum was met

Opening/Welcome

Susan Jimerson welcomed everyone to the call. A review of the agenda was provided. The Recruitment Period for interviews will close June 29, 2018. There may need to be follow-up interviews done depending on the number of interviews being rescheduled.

- The Outreach Committee will meet on June 21, 2018, beginning at 3:00 p.m. ET. Scott Hall, TAP Vice Chair will lead the meeting.
- The Internal Communications Committee (ICC) will meet on June 26, 2018, beginning at 2:00 p.m. ET. They are working on revising the TAP business cards.



- The Tax Withholding Calculator Focus group has completed the review. Thank you to all who participated on the review.
- The Joint Committee (JC) full committee meeting will be June 28, 2018 beginning at 1:00 p.m. ET.
- The JC Strategic Planning Session will be July 10-11, 2018 beginning 8:30 a.m. to 5:00 p.m. ET. Members are encouraged to attend. There will be a conference line available to listen in.

Mary Florence will be working on the 2019 project proposal for the Special Projects Committee. Members are asked to provide their thoughts on what the Special Projects Committee should work on in 2019.

National Office Update

Terrie English welcomed everyone to the call. She expressed thank you to the members who participated on the Tax Withholding Calculator focus group call. There was some good information received. A lot of notes were taken. The site will be up and running by the end of next week. Adjustments will be made along the way. The June Report to Congress will be coming out next week. A brief discussing will need to be had during the next full committee meeting. The National Taxpayer Advocate (NTA) has been reaching out to TAP. It was asked if the TAP would provide group information. The results will have a large impact on the TAP.

Approval of Minutes

May 16, 2018 minutes approved with correction.

Chair Report

Mary Florence welcomed everyone to the call. Thank you to Tiffany Mosely, Kristen Petersen and Chery Williams for stepping up during Florence's absence. The JC will have their Face to Face meeting. They will be discussing strategic planning for next year. There will be a solicitation going out for members input on projects to work. For individual, International and ID Theft issues the committee is hopefully getting the answers that are needed. At the beginning of the year, each subcommittee had items to gather information on. Now is the time to pull out the referral templates and begin filling it in, knowing what the problem statement is. Issues that have not had enough information collected should be look at closing them out. Members were encouraged to decide which issues the committee wants to pursue. Florence needs to know prior to going to the JC meeting to present them to the JC for discussion.

Screening Issue Update

Antoinette Ross stated Issue 38566, *Disclosure of President's Tax Information*. This issue is out of the scope of TAP. Michelle Brookens and Matthew O'Sullivan agreed to recommend closing this issue.



Decision: Full Committee Consensus accept Screening Committee's recommendation and close this issue.

Members of Public

None

Subcommittee Updates

Identity Theft

Cheryl Williams stated the subcommittee reviewed the issue with Identity Theft on www.IRS.gov Issue 32455, *Enhancement to IRS Website on Identity Theft*. They have requested a Subject Matter Expert (SME) to discuss Issue 37112. Jimerson assured the committee there will be someone to speak with the committee at the next meeting. If members have any questions that need to be added they are asked to send them to the Analysts, O'Sullivan and Ross. Debra Awalt and Gary Lindsey stated the request for information had not been documented in their area.

Ross shared presentation showing three different business cards the ICC has been working on to choose from. Members discussed and decided to go with. Jimerson added all the suggestions will be taken into consideration prior to the information being sent in.

International Subcommittee

Tiffany Mosely the subcommittee has two open issues.

- Getting Individual Taxpayer Identification Number (ITIN) renewed or issued (Taxpayer having issues with providing documentation and receiving originals back)
- International taxpayers having difficulties finding Tax Preparers
- Issue with the Passport revocation program (subcommittee is taking a communications approach)

The subcommittee will work on getting a referral completed on these issues.

Outreach

Mosely reminded members to turn in their Activity Reports. The reports are due by the twenty-fifth of each month. She reiterated write it down as it is done to make it easier to complete the report timely and it will help to not forget. Members were encouraged to join the TAP Facebook page. Members were asked if everyone had received their business cards. She will continue to send out reminders to everyone along with tips and ideas for outreach. There is a picture of some of the members to be placed in the Newsletter. If there are any questions members are encouraged to contact Petersen. Copies of the report should be sent to O'Sullivan, Petersen and TAP email address.

Action Items

Ross stated the following action item



- Update May Minutes with corrections and forward to O'Sullivan.
- Close out Issue 38566.
- Follow up on Richard Russell and Cheryl Williams business cards.
- Follow up with ID Badges.
- Confirm SME attendance in meeting for ID Theft Subcommittee call.
- Follow up with Mosely on email with member choice of business card and why.
- Remind members to send questions and copy O'Sullivan and Ross, forward to Gary Lindsey.
- Florence reminded members to submit any articles for the Newsletter.

Jimerson encouraged members to let the staff know if there has been no contact with their Local Taxpayer Advocate. The issue could be as simple as an incorrect phone number. The staff is available to assist in any way possible. English responded to concern on taxpayers reporting scams claiming to be from IRS and requiring personal information. English stated she had a meeting with Treasury Inspector General for Tax Administration (TIGTA) and this scam is being reinvented and they are able to go onto the Internet for information. This is not how IRS does business. Members were encouraged to inform taxpayers to research scams on www.irs.gov.

Closing

Susan Jimerson closed the meeting.

**Next Meeting: Wednesday, July 18, 2018
2:00 p.m. ET, 1:00 p.m. CT, 12:00 p.m. MT, 11:00 a.m. PT**

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



**Special Projects Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
July 18, 2018**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer (DFO)

Members Present

- | | | |
|--------------------|-----------------------|------------|
| • Mary Florence | Kansas City, MO | Chair |
| • Kimberly Mason | Chicago, IL | Member |
| • Kristen Petersen | Colorado Springs, CO | Vice Chair |
| • Richard Russell | Owens Cross Roads, AL | Member |
| • Juliana Weeks | Blythewood, SC | Member |

Members Absent

- | | | |
|---------------------|--------------------|--------|
| • Michelle Brookens | Taylorville, IL | Member |
| • Harold Manasa | Hendersonville, NC | Member |
| • Tiffany Mosley | West Hollywood, CA | Member |
| • Cheryl Williams | Shelton, WA | Member |

Staff Present

- Terrie English, TAP Director
- Susan Jimerson, Designated Federal Officer
- Matthew O'Sullivan, TAP Program Analyst
- Antoinette Ross, TAP Program Analyst
- Debra Awalt, W&I
- Pamala Lowe, W&I
- Annie Gold, TAP Administrative Assistant

Members of Public

None

Roll Call

Quorum was met.

Opening/Welcome – Susan Jimerson (DFO)

Jimerson welcomed everyone to the call. A review of the agenda was shared.

- The Joint Committee (JC) will have their monthly meeting July 26, 2018 beginning at 1:00 p.m. ET. Members were encouraged to join in on the call. There is one referral will be reviewed for submission for IRS.
- The Outreach Committee call is scheduled for Thursday, July 19, 2018.
- The Internal Communications Center (ICC) next meeting will be



July 24, 2018 at 2:00 p.m. ET.

- TAP Withholding Calculator focus group finished up their meeting on last week. Thank you to the members who joined in on the call. All the comments and feedback from experiences using the Paycheck Withholding Calculator were added in an executive summary and was forwarded on the Nina Olson, National Taxpayer Advocate (NTA) for review.
- Tax Forms and Publications committee are looking at the Form W4 and to provide recommendations for it.
- The recruitment phase has been completed and now are in the recommendation stage. The recommendations will be forwarded on to the TAP management staff. The background checks are being processed for the applicants for members and alternates. Thank you to members who assisted in the Interviews.

Approval of Minutes

June 20, 2018 minutes approved.

Chair Report

Florence stated the JC had their face to face meeting. She was unable to attend. Maryclaire Ramsey attended the meeting and asked TAP to provide comments on the new website.

- Florence suggested a new link be added on www.improveirs.org on Library sites. Comments were made concerning having emails for TAP members in their states.
- They are looking at redoing www.TAPSpace.org.
- Members were asked to let her know what they need and want to be added. Compile a list to be shared with Ramsey.
- Members were asked if they were receiving Nina Olson, NTA Blog. It has a lot of information showing problems she has seen. It will provide information to show what is going on.
- The ID Theft subcommittee had a couple of speakers at the meeting. Gray Lindsey informed them he would get a Subject Matter Expert (SME) to speak. Pamela Lowe is working with ID Theft. All ideas on ways to work the issues are welcomed.
- Cedric Jeans did a presentation on the survey. Jimerson added the survey results were received. During the survey, Jimerson did a presentation on member training and what could be done to improve on what works well and what could be changed. There is a lot of good information. Looking for ways to meet the needs of second and third year members. Possible make changes to new member orientation process. The Survey was discussed in depth. Special thank you to Florence for her presence and duration on call.



- Maryclaire Ramsey asked for updates to the TAP image, business cards and materials for TAP. Members were encouraged to get busy with ideas and suggestions on how to improve TAP.

Screening Issue Update

Matthew O'Sullivan stated the Screening Committee received four issues.

- **Issue 38586**, taxpayer complaining not being able to get information from the phone line on what happened to his refund. Recommendation is to forward to the Toll Free Committee
- **Issue 38663**, Get Rid of IRS. Legislative issue, Recommendation **Drop**
- **Issue 38665**, Issues outside of US to get and Individual Taxpayer Identification number (ITIN). Legislative issue. Recommendation **Drop**
- **Issue 39691**, IRS Representative Conduct. Is a complaint dealing with collection employees? Elevated to management to address as customer service issue.

Decision: Full Committee Consensus accept Screening Committee's recommendation as presented.

Subcommittee Updates

Identity Theft

O'Sullivan stated Debra Awalt shared some contact information with the subcommittee for someone from IRS to share information on the ITIN issue. The subcommittee has been asking for additional issues to work. They received one issue transferred from another area.

- Issue 37364, Access and Creating Accounts for Payment. This is a two-step verification process. O'Sullivan will research the data and send to the committee for review.

International Subcommittee

O'Sullivan stated Tiffany Mosely has put in a lot of hard work on this subcommittee. The subcommittee has received most of the information needed to move forward. The primary focus is helping the international taxpayers. Mosely will begin drafting her referral on how the IRS can combine the information on www.irs.gov that would be accessible to taxpayers. The subcommittee is also looking at the taxpayer revocation issue and will begin to work on the referral. O'Sullivan is researching information on whether or not the state would supply information to IRS.

Internal Communications Subcommittee

Antoinette Ross provided the following update.

- July 24, 2018, ICC will begin the procedure to start the referrals to do new business cards and get members to look at Facebook.
- Encourage members to go onto Taxpayer Advocate Facebook page to view updates put there by ICC, Sheila Olsen, Angela Hower.



- Submit Articles for the Newsletter timely. They are due to chair by the twenty fifth of the month to have out by the first of the month.

Ross will send out the Facebook page link to each member. The tax reform and paycheck checkup has been posted on the TAP Facebook page. Jimerson informed the committee Nina Olson, NTA is one of the administrators on TAP Facebook page and she posts a lot of interesting information. There is information on tax reform and the Paycheck Checkup Calculator on the page.

Outreach – Kristen Petersen

Petersen reminded members their Activity Reports are due to be turned in by the twenty fifth of each month. Turning the reports in on time make a difference in the overall report. She will send out some information with ideas in doing outreach activities. Members were encouraged to share any ideas they may have that would help in doing outreach activities. Florence added to make sure to share all ideas with the committee by adding it in the body of the articles submitted for the Newsletter.

Action Items

O'Sullivan stated the following action item

- Post the Minutes
- Send out information on the two-step process to the committee
- Follow up with IRS on getting a SME for ID Theft subcommittee meeting
- Send copy of new issue to committee for review
- Update Systemic Advocacy Management System (SAMS) with Screening Report
- Follow up with state and IRS corresponding information
- Send website link on Facebook page to members

Closing

Susan Jimerson closed the meeting.

**Next Meeting: Wednesday, August 15, 2018
2:00 p.m. ET, 1:00 p.m. CT, 12:00 p.m. MT, 11:00 a.m. PT**

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



**Special Projects Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
August 15, 2018**

Designated Federal Officer

- Lisa Billups Acting, Designated Federal Officer (DFO)

Members Present

- Mary Florence Kansas City, MO Chair
- Kimberly Mason Chicago, IL Member
- Tiffany Mosley West Hollywood, CA Member
- Kristen Petersen Colorado Springs, CO Vice Chair
- Juliana Weeks Blythewood, SC Member

Members Absent

- Michelle Brookens Taylorville, IL Member
- Harold Manasa Hendersonville, NC Member
- Richard Russell Owens Cross Roads, AL Member
- Cheryl Williams Shelton, WA Member

Staff

- Terrie English, TAP Director
- Matthew O’Sullivan, TAP Program Analyst
- Antoinette Ross, TAP Program Analyst
- Debra Awalt, W&I
- Pamala Lowe, W&I
- Gary Lindsey, W&I
- Annie Gold, TAP Administrative Assistant

Members of Public

- Paul Merrion

Roll Call

Quorum was met

Opening/Welcome – Lisa Billups, Acting DFO

Billups welcomed everyone to the call. She shared an overview of the agenda. She is filling in behind Susan Jimerson who is on a detailed assignment with Communications, Stakeholder Liaison & Online Services (CSO) for the next two months. Billups also covered the National Office Report.

- Preparations are being done for the TAP year closing and the transition into the next year.



- The Planning Meeting with all TAP chairs was very productive. They shared some of the challenges, successes by TAP members.
- All Proposals submitted will be reviewed next month.
- Members were encouraged to share with Mary Florence and Billups how Special Projects and TAP overall would make even more impact. Any and all ideas are welcomed. Florence will prepare the proposals.
- New members' recommendations are being made and the package for selections will be sent forward for approval. There are approximately 30 vacancies and numerous alternate vacancies.
- The Annual Report will begin to be prepared as the end of the year approaches. Gilbert Martinez sent out a solicitation for volunteers to members to participate in completing the 2018 Annual Report. The Annual Reports summarizes the TAP year. It includes the TAP activities, hours, successes, challenges encountered in working throughout the communities. All members interested should contact Martinez and send a copy to Billups.

National Office Report – Terrie English

English shared the All TAP Virtual Meeting scheduled for August 16, 2018 has been cancelled to secure Subject Matter Experts (SMEs) to attend. There will be a call on next month and information will be sent out to members. Topics are being discuss that would be beneficial. Members were asked to provide any topics for discussion in during the upcoming meeting.

Approval of Minutes

July 18, 2018 minutes approved.

Chair Report – Mary Florence

Florence stated the Annual Report is an opportunity for members to work on. All members interested are encouraged to contact either Florence, Matthew O'Sullivan or Billups. Members do have input in the Annual Report. This would allow members to find out about other issues and areas being worked by the other committees within TAP. Florence reminded members of the email sent by Billups on changes to the tax law, Paycheck Checkup. Members were encouraged to share with individuals they know to be aware of the changes to the tax law.

Screening Issue Update

Matthew O'Sullivan stated the Screening Committee has received some Issues that did not get into the inventory report.

- **Issue 36017**, Feedback IRS. The taxpayer concerned about SSN being shown on the letters and this could be a part of ID Theft. Additional research being done. Screening Committee recommends keeping this issue.

- **Issue 36371**, Online Payment Plan taxpayer having problem with this. Recommend holding this issue for possible Future State Initiative connection.
- **Issue 36376**, Taxable dividends taxpayer suggested dividends be taxed at the source. This is a legislative issue. **Drop**
- **Issue 36399**, Ogden, Utah Center Tax Processing. The taxpayer concerned about the date stamped logged in is not reflecting the date of filing. Recommend hold this issue and do further research with possible Future State connection. Billups added this issue will be forwarded to Systemic Advocacy for further research.
- **Issue 36414**, No tech support on www.IRS.Gov website. Possible Future State issue. Additional research to be done and forward to Systemic Advocacy for further research. Committee recommends holding this issue.
- **Issue 36785**, Reinstate Power of Attorney through Practitioners Service Online accounts. Additional research is being done. Recommend holding this issue for possible Future State issue and clarification.
- **Issue 36842**, Taxpayer unable to pay property tax online. Responded to taxpayer, this is not an IRS issue. **Drop**
- **Issue 36969**, Taxpayer living abroad unable to call IRS to inquire on mailing forms, etc. This issue is consistent with other issues on the International subcommittee. Recommend hold this issue until a appropriate action can be share.
- **Issue 37113**, Protection of Personal Privileged Information. Recommend associate this issue within ID Theft issues. Additional research will be done.
- **Issue 37119**, Social Security number issue. Recommend hold this issue for further research.
- **Issue 37154**, Eliminate Fraudulent Tax Returns. Taxpayer suggest delay issuing tax refunds after April 26, 2018. Legislative issue. **Drop**
- **Issue 37156**, International Online Services. This issue is duplication. Recommend holding for additional information.
- **Issue 37195**, Allocate on tax forms where money should go. This is not a TAP issue. Legislative, **Drop**
- **Issue 37212**, The Screening committee will hold this issue and do further research.
- **Issue 37337**, Taxpayer filing overseas needing information on how to add purchase to return. Committee will combine this issue with a related issue with International issues.
- **Issue 37384**, Taxpayer wants to create online accounts but has Identity information a concern. Committee will keep this issue as it has ID Theft issues.
- **Issue 38454**, Government Accountability for Tax Dollars Independent audit. This is not an IRS issue. Legislative, **Drop**



Decision: Full Committee Consensus accept Screening Committee's recommendations as presented.

Subcommittee Updates

Identity Theft

O'Sullivan stated he sent Cheryl Williams an email on to find out any additional information on the issues. The document Richard Russell sent on Issue 37364, *Access and Creating Accounts for Payment* which is a two-step verification process is still pending a response from IRS. Billups shared information to contact another person from IRS. Waiting for a response back and will share with the committee once received or elevation to TAP Management if no response come back.

International Subcommittee

Tiffany Mosely stated the subcommittee had their meeting on last week. They have three issues they are working on.

- Provide communications with taxpayers living and working abroad, assisting in getting online information and correspondence abroad.
- Working with IPINs and ITIN issues, verification process, expiration dates a referral has been drafted with corrections and will have ready for the full committee's review during next month's meeting.

Florence added a reminder the committees have three more months and to keep this in mind when planning their work.

Internal Communications Subcommittee

Tiffany Mosely stated the subcommittee is sharing information internally and getting the TAP Newsletter out. Articles are due by the twenty-fifth of each month to get the Newsletter completed. Timely submissions have been good. Each member is asked to submit an article sharing what they are working on. Regular updates are being made to the TAP Facebook page. Members are encouraged to join the Facebook page. This will help in getting information out to taxpayers on what TAP is working on and that TAP exists. Their feedback is needed. The subcommittee is working on the Business cards update. Things are going forward. They are also working on updating the TAP flyers and how information is being shared on materials. The mini brochures are being updated for next year

Outreach – Kristen Petersen

Petersen reminded members their Activity Reports are due to be turned in by the twenty-fifth of each month. Members were encouraged to put everything on the report relative to TAP. Contact representatives to speak with them and let them know what TAP is working on could help get information needed would be a good idea. The Local Taxpayer Advocate are a good resource for this information as well. Turning the Reports in on time make a difference in the overall report.



Action Items

O'Sullivan stated the following action item:

- Update TAP inventory with the Screening Report issues.
- Follow up with Systemic Advocacy and share information with members.
- Monitor and follow up with IRS on the document Richard Russell wrote.
- Post July approved minutes.
- Share information of inventory and share with the full committee after grouping issues together.

Closing

Billups closed the meeting.

**Next Meeting: Wednesday, September 19, 2018,
2:00 p.m. ET, 1:00 p.m. CT, 12:00 p.m. MT, 11:00 a.m. PT**

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



**Special Projects Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
September 19, 2018**

Designated Federal Officer

- Lisa Billups Acting, Designated Federal Officer (DFO)

Members Present

- Mary Florence Kansas City, MO Chair
- Tiffany Mosley West Hollywood, CA Member
- Richard Russell Owens Cross Roads, AL Member
- Juliana Weeks Blythewood, SC Member
- Cheryl Williams Shelton, WA Member

Members Absent

- Michelle Brookens Taylorville, IL Member
- Harold Manasa Hendersonville, NC Member
- Kimberly Mason Chicago, IL Member
- Kristen Petersen Colorado Springs, CO Vice Chair

Staff Present

- Terrie English, TAP Director
- Lisa Billups, Acting Designated Federal Officer
- Matthew O'Sullivan, TAP Program Analyst
- Antoinette Ross, TAP Program Analyst
- Debra Awalt, W&I
- Pamala Lowe, W&I
- Gary Lindsey, W&I
- Annie Gold, TAP Administrative Assistant

Members of Public

N/A

Roll Call

Quorum was met

Opening/Welcome – Lisa Billups, Acting DFO

Billups welcomed everyone to the call. She is filling in behind Susan Jimerson who is on a detailed assignment with Communications, Stakeholder Liaison & Online Services (CSO) for the next two months. Members were encouraged to make the most of the remaining time in this TAP year by offering to assume roles and accept responsibilities regarding projects being worked. If members need



assistance they are to reach out to the leads, analysts and management. The Staff is available to help navigate through the process. There will be an All TAP Virtual Meeting on Thursday, September 20, 2018. It will begin at 11:00am, EST. Members were encouraged to attend the call. Information will be shared about TAP, what the chairs are doing and the activities of the project committees. Terrie English will not be on the call today to cover the National Office Report because she is in training. She will be on the All TAP Virtual call tomorrow to cover the National Office Report. Billups shared an overview of the agenda.

Approval of Minutes

August 22, 2018 minutes approved.

Chair Report – Mary Florence

Florence confirmed the All TAP Virtual Meeting was scheduled for September 20, 2018, at 11:00 a.m. ET. Another invite will be sent out to members. There was a www.TAPSpace.org survey sent out as well. Members were reminded there are two meetings remaining until the end of this TAP year. Everyone was encouraged to reach out for assistance to get the referrals completed and let Florence know in order for her to get it on the Joint Committee's calendar. Florence stated she is working on contact information for third year members to maintain the outreach material that has been worked on. A list of projects to work on next year is being put together and a work list for the International work group around passport revocation. Some recommendations shared with Tiffany Mosley regarding the Internal Communications Committee (ICC) (a business calling card rather than a business brochure). A request was sent to the chairs for a list of referrals anticipated to get in this year. All this information is being collected for the end of the year, Annual Report. She encouraged members to get their responses in by the end of the week. Elections for the TAP chair and the vice chair will be done this year. If anyone is interested in one of the positions, reach out to Florence and/or the TAP Staff. There will be a meeting on the duties and responsibilities.

Screening Issue Update

Matthew O'Sullivan stated he sent out a copy of the Screening Report to the full committee.

- **Issue 36943**, Taxpayer was needing information on the filing of the Form 1099. O'Sullivan sent information with direction on it to members. He is prepared to send a response to the submitter. The Screening Committee's recommendation is to drop this issue. It is not a TAP issue. Florence added concerns on how non-TAP issues can be routed to possibly an administrative process to eliminate the delay it takes for the committee to go through the issues only to drop them. Billups added there is an analyst responsible for web comments and responses. The information will be provided as submitted to the area requested and update in Systemic Advocacy Management System (SAMS) on where to go for the taxpayer.



- **Issue 39850**, research is being done on this issue. Recommendation pending.
- **Issue 39881**, Taxpayer concerned about the IRS Oversight Board not having the correct number of members to make quorum as set by the Senate. Recommendation is to drop legislative matter. **Drop**
- **Issue 39899**, Virtual/Remote TACs this issue is being taken on by the TAC committee.
- **Issue 39900**, Taxpayer suggesting if owe under \$10,000.00 and have an Installment Agreement no penalties or interest will be charged. Recommendation is to drop legislative matter. **Drop**

Decision: Full Committee Consensus accept Screening Committee's recommendations as presented.

Subcommittee Updates

Identity Theft

Cheryl Williams stated Richard Russell presented a suggestion called Multi-Factor Authentication (MFA) that may solve all the open issues. Members were asked to read over the document Williams forwarded for discussion. Document NIST863-3. O'Sullivan agreed the publication is available for viewing on Google. It shows what IRS is required to do rather. Florence added members should think of issues people are having and wrap arms around those issues. A Hack-A-Thon was suggested for ideas to explore other options. Williams agreed to write up the ideas as a referral. Bit Coin referral was suggested to the subcommittee to do a write up on.

International Subcommittee

Tiffany Mosely stated the subcommittee is working on a draft referral. They anticipate having the referral completed by the next couple of meetings. The subcommittee is looking to work the Passport Revocation issue on next year. They will work to narrow it down and develop an effective change. The applications for identification numbers for taxpayers is the referral the subcommittee is working on now.

Internal Communications Subcommittee

Mosely added she has been attending the ICC calls. A draft referral was reviewed for the draft business cards. She is waiting for their next meeting to see if the draft will be finalized before sharing the draft she has. There are two versions of the business card that will be submitted. Florence added while on www.TAPSpace.org the link for tax changes did not copy as a link. It copied the name. The (https://) needs to be added to the full link. Billups added the TAP staff will be notified to add the actual link instead of just the title.

Outreach – Kristen Petersen

The Outreach Report will be shared at next month's meeting.



Action Items

O'Sullivan stated the following action item:

- Make corrections to last month's minutes and post.
- Drop issues from the Screening Report.
- Once information is received on the Individual Taxpayer Identification Number (ITIN) issue forward to members.
- Remind members he is available for assistance.

Closing

Billups closed the meeting.

**Next Meeting: Wednesday, October 17, 2018
2:00 p.m. ET, 1:00 p.m. CT, 12:00 p.m. MT, 11:00 a.m. PT**



**Special Projects Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
October 17, 2018**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer

Members Present

- Michelle Brookens Taylorville, IL Member
- Mary Florence Kansas City, MO Chair
- Kimberly Mason Chicago, IL Member
- Tiffany Mosley West Hollywood, CA Member
- Kristen Petersen Colorado Springs, CO Vice Chair
- Juliana Weeks Blythewood, SC Member
- Cheryl Williams Shelton, WA Member

Members Absent

- Harold Manasa Hendersonville, NC Member
- Richard Russell Owens Cross Roads, AL Member

Staff Present

- Terrie English, TAP Director
- Susan Jimerson, Designated Federal Officer
- Matthew O’Sullivan, TAP Program Analyst
- Antoinette Ross, TAP Program Analyst
- Debra Awalt, W&I
- Pamala Lowe, W&I
- Letitia Reagor, TAP Program Analyst
- Annie Gold, TAP Administrative Assistant

Members of the Public

- Paul Merrion
- Keith Wallace

Roll Call

Quorum was met

Opening/Welcome – Susan Jimerson

Jimerson welcomed everyone to the call. She gave an overview of the agenda. Terrie English was not able to be on the call today. Sheila Andrews is Acting while she is away from the office.

- Meet the Candidates call has been rescheduled for Friday,



- October 19, 2018 beginning at 2:00 p.m. ET. Members were encouraged to join the call. Candidates will be presenting their statements for the positions.
- The TAP year end is approaching, and members were reminded to work towards wrapping up all referrals and get them over to the Joint Committee in time for consideration.
 - The Joint Committee's next call is scheduled for October 25, 2018, beginning at 1:00 p.m. EST. Members are welcome to join the call and listen in. Information will be shared on what's going on in the other Project Committees and activities happening within TAP.
 - Members who will be retiring off the TAP. Members are asked to write a plan for project work in 2019 and a summary to be shared with members coming aboard. The transfer of the knowledge gained in 2018 onto 2019 Special Projects Committee would be helpful.

Approval of Minutes

September 19, 2018 minutes approved with corrections.

Chair Report – Mary Florence

Florence stated how important it is to attend the Meet the Candidates call on Friday, October 19, 2018. They will be sharing their statements why they would be the best candidate for the position of chair or vice chair. Members would learn more on where to focus their efforts and a chance to ask questions of the candidates. The Special Project has one more meeting remaining in this TAP year. The subcommittees are busy finalizing their draft referrals. Once the referral has been completed, send to Matthew O'Sullivan. He will send it to the Quality Review team, Systemic Advocacy, and to the Attorney Advisor for their comments. This process takes up to ten days. It comes back to the full committee for review. It is forwarded to the Joint Committee for consideration before it goes to IRS. Florence added she completed a draft of the yearend report with possible things to work on next year. It will be sent out with all the suggestions within the next week. Members were encouraged to read through it prior to the next full committee meeting. Florence shared she will be retiring off the Panel and will not be on the Panel next year.

Screening Issue Update – Michelle Brookens

Brookens stated

- **Issue 39850**, the Screening Committee is asking both entities to provide feedback on this issue. Forward any issues determined as non-legislative to TAP.
- **Issue 39935 and 39989** are Legislative and the Screening Committee recommendation is to Drop.
- **Issue 39986**, involves obtaining Online Transcripts and the two-factor verification.



- **Issue 39987** could be merged with **Issue 39986**. Both related to obtaining the Secure information.
- **Issue 39990**, involves having the Social Security Numbers and EIN numbers removed from any documents. Discontinue adding the numbers on checks for payments.
- **Issue 39991**, contact Forest Committee to have the fields changes and noted.
- **Issue 40004**, legitimate issue on checking schedules.

Decision: Full Committee Consensus accept Screening Committee's recommendations as presented.

Subcommittee Updates

Identity Theft –Cheryl Williams will be writing the recommendation for Issue 37212, Crypto Currency. The subcommittee anticipates having the referral ready for the next full committee meeting. Florence added Taxpayers are not finding information on it. After further research it was discovered the IRS calls it Virtual Currency. Extra help is available contact Matthew O'Sullivan or Florence. O'Sullivan was asked to follow up with IRS Cyber Security on Hack-a-thon. He sent the inquiry to them on yesterday. He is waiting for their response and will forward it to the committee when it is received. Jimerson suggested to assign an Issue number to this issue for identification.

International Subcommittee

Mosely stated the final stages for the referral on Issue 35050, Receiving original documents back when applying for Individual Taxpayer Identification Number (ITIN)s. The referral has been drafted with change to the language. It will be forwarded to Quality Review. The subcommittee will be reviewing the other open issues during their next meeting. O'Sullivan added the members on the Quality Review team are Brookens, Juliana Weeks, Williams. Members were encouraged to let O'Sullivan know if changes are needed. He will forward the referral to Systemic Advocacy and on to the Attorney Advisors. Mosely will resend a copy of the referral to the committee for review.

Internal Communications Subcommittee

Mosely stated the subcommittee has moved forward with the Business Cards referral. They are busy with providing updates for the Articles to go into the Newsletter. Updates are added to the Facebook page for TAP with possible Outreach activities.

Outreach – Kristen Petersen

Petersen reminded the committee the reports are due on Thursday, October 25, 2018. Members were asked to look over their calendars for missed hours. Florence added to check www.TAPSpace.org calendar. All meetings are posted there. Meetings and members who worked on projects are also there. The hours help TAP get the funding needed. It also helps determine the



Presidential Volunteer Awards. Members are encouraged to get their reports in. The Internal Communications Committee put a lot of suggestions on Facebook that would be helpful in doing outreach activities. Members who have done any Outreach activity were encouraged to submit them to Petersen.

Action Items

O'Sullivan stated the following action items:

- Make corrections to last month's Minutes and Post.
- Close out Issues from Screening Committee in Systemic Advocacy Management System (SAMS). Respond to the eleven Submitters on what the determination.
- Reach out to Form and Publications Committee Analyst to get information on the ITIN W-7 Form and see if they can provide additional clarification.
- Go into SAMS in response to Richard Russell's question on Hack-a-thon added. Pending the receipt of the response from IRS Cyber Security, send a copy to the full committee for review.

Round Table

Florence reminded members the Meet the Candidates meetings. Members were reminded to try and attend the Joint Committee meeting. If there are any road blocks, members should contact O'Sullivan or Florence.

Jimerson added the Annual Report 2018 is being worked on. An accurate count of the Outreach hours is needed. Take time to update your reports. The determination on what award will be given to the retiring members depends on it. The last full committee meeting is scheduled right before the Thanksgiving Holiday. It is very important that quorum is met. Members are encouraged to attend the call to close out the year. If not able to attend let O'Sullivan, Florence or Jimerson know. Jimerson expressed thank you to everyone for all of the work and jobs well done.

Closing

Jimerson closed the meeting.

**Next meeting: Wednesday, November 21, 2018
2:00 p.m. ET, 1:00 p.m. CT, 12:00 p.m. MT, 11:00 a.m. PT**

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



**Special Projects Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
November 21, 2018**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer

Members Present

- | | | |
|---------------------|-----------------------|--------|
| • Michelle Brookens | Taylorville, IL | Member |
| • Mary Florence | Kansas City, MO | Chair |
| • Harold Manasa | Hendersonville, NC | Member |
| • Tiffany Mosley | West Hollywood, CA | Member |
| • Richard Russell | Owens Cross Roads, AL | Member |
| • Juliana Weeks | Blythewood, SC | Member |
| • Cheryl Williams | Shelton, WA | Member |

Members Absent

- | | | |
|--------------------|----------------------|------------|
| • Kristen Petersen | Colorado Springs, CO | Vice Chair |
| • Kimberly Mason | Chicago, IL | Member |

Staff Present

- Terrie English, TAP Director
- Susan Jimerson, Designated Federal Officer
- Matthew O'Sullivan, TAP Program Analyst
- Gilbert Martinez, TAP Program Analyst
- Antoinette Ross, TAP Program Analyst
- Robert Rosalia, TAP Program Analyst
- Debra Awalt, W&I
- Pamala Lowe, W&I
- Letitia Reagor, TAP Program Analyst
- Andrew Marshall, SA
- Annie Gold, TAP Administrative Assistant

Members of the Public

- Paul Merrion

Roll Call

Quorum was met

Opening/Welcome – Susan Jimerson

Jimerson welcomed everyone to the call. She gave an overview of the agenda. Terrie English could not be on the call today. Robert Rosalia will sit in for English.



Jimerson expressed thank you to all the members for their dedication and hard work on Issues and referrals prepared. She congratulated the third-year members that are retiring off the panel. Much appreciation was expressed.

- Email solicitation for members to provide their preference on what committee they would like to work on next year (2019) has been sent out. Members were encouraged to review it and provide their first, second and third choice of committee preference.
- The Recruitment Package has been forwarded to the National Taxpayer Advocate, Nina Olson. Once she approves it will go to the Commissioner and on to the Treasury for approval. There will be an announcement on the selections. Contact will be made with the New Members to find out their interest and what committee they will serve on.
- The last Joint Committee meeting will be held on next week. All referrals have been submitted for final approval. Members are encouraged to listen in on the meeting.

National Office Report – Robert Rosalia, Acting TAP Director

Rosalia stated the TAP is on pace to begin the upcoming TAP year with the anticipation of the Continuing Resolution. Members were asked if they were able to complete the survey that was sent out. There was an issue with question number two and it will be looked at for correction. The information from the survey will be used to improve TAP. Terrie English sent her thank you and appreciation to all the members. Juliana Weeks and Mary Florence will be retiring, and they will be missed. Florence added she enjoyed working on the Special Projects committee.

Approval of Minutes

October 17, 2018 minutes approved as submitted.

Chair Report – Mary Florence

Florence stated this is last meeting for this TAP year. She thanked everyone for being on the call, their dedication and hard work. Thank you to the staff for their support. She shared how the Chair Report provided information on the number of Issues that were touched. Florence acknowledged and commended the members and their committees for the different referrals they worked through with submitting referrals. Tiffany Mosley shared the updates on the International Subcommittee:

- **Issue 35050**, the International Subcommittee worked the Issue. Feedback was received stating there was a hardship imposed. IRS has a process in place for receiving, reviewing and processing the applications. The referral is to improve the communications efforts such as the Individual Taxpayer Identification Number (ITIN) Homepage, to consolidate all the information available. To link ITIN processing information. Corrections were made to IRS language on what kind of documentation is permissible in obtaining the ITIN. The recommendations were to help flush out some of the



requirements. Tiffany will present the referral to the Joint Committee during their meeting next week.

Decision: Full Committee Consensus accept the recommendation as presented.

Cheryl Williams stated the Identity Theft Subcommittee recommendation for

- **Issue 37212**, Crypto Currency is for Crypto Currency standards. It is a complex subject. They have proposed to change the language to expand the search terms used by Taxpayers and have made recommendations to make the process easier. The subcommittee has done research on Bit-Coins. These recommendations are included in the referral. Williams will present at the Joint Committee meeting.

Decision: Full Committee Consensus move forward with referral to the Joint Committee.

- **Issue 36509**, helping Taxpayers find their local offices. Mosely stated the IRS rejected the recommendation. The subcommittee discussed the issue and decided to reserve the right to rebut the IRS' denial. They carry the issue over to 2019, will rework and use any additional information to resubmit.

Decision: Full Committee Consensus agreement to carry this issue over to 2019 and work on the rebuttal.

Screening Issue Update – Michelle Brookens

- **Issue 36397 and 36213**, are both individual issues and advised to call IRS with the (800) number.
- **Issue 40050**, there has been no contact information provided for this issue. Recommendation is to close this issue.
- **Issue 40111**, this is an individual issue not and IRS issue. Recommendation is to close this issue.
- **Issue 40067**, involves the Hack-a-thon. They have done some reaching out on this issue. Their recommendation is to carry over to 2019 to be work.

Decision: Full Committee Consensus accept Screening Committee's recommendations as presented.

Subcommittee Updates

Identity Theft –Williams stated there was no additional information to report other than the referral previously mentioned.

International Subcommittee

Mosely stated the subcommittee will be working on the ITIN Issue and any additional issue in 2019.

Internal Communications Subcommittee



Mosely stated the subcommittee has moved forward with the Business Cards referral. Jimerson added the referral was presented to the Joint Committee. There were some concerns about it. It was sent back to the Internal Communications subcommittee. The analyst wrote up some possible changes to consider at the meeting being held on Tuesday. By doing so, it could be resubmitted to the Joint Committee at their meeting coming up this month. Mosely reminded members to submit any articles to be added to the Newsletter. A replacement for Sheila Olsen who will be retiring from TAP will need to be done as the Administrator on the TAP Facebook page. A suggestion to have more than one Administrator would be something to be considered. Any members interested should contact Mosely. Final Reports are important to get all the information added to the Newsletter by the second week of December.

Outreach Report

Florence expressed thank you to Williams for stepping up on her behalf. Members were reminded to submit their Reports by the end of the month. They are due by the twenty-fifth of the month. Jimerson added the final Reports are very important as the information goes into the Annual Report. Members returning were encouraged to keep track of any November and December Outreach Activity and the hours.

Action Items

O'Sullivan stated the following action items:

- Post October's Minutes to www.TAPSpace.org
- Update Systemic Advocacy Management System (SAMS) with information on the rebuttal of Issues to be forwarded to the Joint Committee. Make sure Lisa Billups has them
- Update SAMS on Issue 36509
- Send form to members on rebuttal of an issue
- Carry forward updates voted on by the committee

O'Sullivan expressed appreciation and thank you to the committee for their hard work and attending each monthly meeting with quorum being met each time.

Round Table

Florence shared her appreciation in having a positive impact on individuals, friendships and contacts. She is available to assist in the future if called upon. Members all expressed thank you to the TAP and staff. Happy Holiday to everyone. Jimerson expressed congratulations to Florence and Weeks on their retirement from the TAP. They were invited to call and listen in on future calls. Updates on issues would be shared by the analyst or management. Special thank you to the Members of the Public who joined the call.

Closing

Jimerson closed the meeting.



Next Meeting: Face to Face Meeting 2019

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