



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

Designated Federal Officer

- Cedric Jeans Designated Federal Officer

Attendance

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

Members Absent

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

Staff

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

Welcome Announcements/Acknowledgements

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

Chair Comments

Cheryl Williams welcomed everyone to the call.

Members of the Public

None

Quorum

Quorum was met.



National Office Report

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

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

DFO Report

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

Minutes Approval

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

Action: Minutes approved as submitted.

Outreach Report

Hughes shared the following updates for outreach:

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

Subcommittee 1 (International) Report

Havey reported:

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

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

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

Action: Issue elevated to JC for elevation to IRS.

Project Referrals being worked by subcommittee:

Issue 43614-Communications with IRS via Electronic Means

Issue 43819-New Online Tools Needed to Update Banking Information

Subcommittee 2 (Identity Theft)

Hughes reported:

TAP Referral Issues for JC Consideration:

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

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

Snyder motioned; Williams seconded.

Action: Issue elevated to JC for elevation to IRS.

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

Action: Issue elevated to JC for elevation to IRS.

TAP Referral for Issues:

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

Internal Communications Committee (ICC)

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

Ice Breakers

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

Williams- Ptolemaic Era approx. 28bc to visit Cleopatra

Havey- Elizabethan Era to experience life with the queen

Hughes- Early Chinese culture when the country was newly formed

Moretti- 100 years to speak to Einstein

Snyder- New Zealand before European settlers arrived

Jeans- Egypt to see the days of the Pharaohs

Brown- Egypt to see the pyramids being built

Holloway- Egypt pyramids

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

Hawkins- Israel at time of Christ



Odom- Caesar during his conquests

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

Action Items

Antoinette Ross will do the following:

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

Chair or Vice Chair of SP Committee Closing Comment

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

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

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

Closing

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

Next Meeting: TBD

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



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

Designated Federal Officer

- Cedric Jeans Designated Federal Officer

Attendance

- | | | |
|------------------------|----------------------|------------|
| • Michael Avery | San Juan, PR | Member |
| • Dorothy Havey | Belfast, ME | Member |
| • John Hughes | Memphis, TN | Vice Chair |
| • Robert “Bob” Moretti | Great Falls, MT | Member |
| • Richard Russell | Owens Crossroads, AL | Member |
| • Laura Snyder | Paris, France | Member |
| • Cheryl Williams | Shelton, WA | Chair |
| • Gina Gray | Nichols Hills, OK | Member |

Members Absent

- Brandon Ruest N. Providence, RI Member

Staff

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

Welcome Announcements/Acknowledgements

Cedric Jeans welcomed all attendees and opened the meeting.

Chair Comments

Cheryl Williams welcomed everyone to the call.

Members of the Public

None



Quorum

Quorum was met.

National Office Report

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

DFO Report

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

Minutes Approval

September 10, 2020. Havey motioned; Russell seconded.

Action: Minutes approved as submitted.

Outreach Report

John Hughes shared the following updates for outreach:

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

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

Review of Notice and Correspondence Committee's Referrals

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



Subcommittee 1 (International) Report

Havey reported:

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

- Issue 42967- Simplified Reporting for Taxpayers Abroad

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

Action: Issue elevated to JC for elevation to IRS.

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

Action: Issue elevated to JC for elevation to IRS.

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

- Issue 43614- Communications with IRS via Electronic Means

This issue is tabled until the next month committee meeting.

Subcommittee 2 (Identity Theft)

Hughes reported:

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

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

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

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

Action: Issue elevated to JC for elevation to IRS.

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

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

Action: Issue elevated to JC for elevation to IRS.

Internal Communications Committee (ICC)

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

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



Ice Breakers

Would you prefer Mexican or Chinese food for lunch?

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

Action Items

Antoinette Ross will do the following:

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

Chair or Vice Chair of SP Committee Closing Comment

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

Closing

Jeans thanked everyone for attending, then closed the call.

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

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



**Special Projects
Taxpayer Advocacy Panel (TAP)
Monthly Meeting Minutes
Thursday, September 10, 2020**

Designated Federal Officer

- Cedric Jeans Designated Federal Officer

Attendance

- | | | |
|--------------------------|----------------------|------------|
| • Michael Avery | San Juan, PR | Member |
| • Dorothy Havey | Belfast, ME | Member |
| • John Hughes | Memphis, TN | Vice Chair |
| • Phillip "Phil" Kleiber | Roswell, GA | TAP Chair |
| • Robert "Bob" Moretti | Great Falls, MT | Member |
| • Richard Russell | Owens Crossroads, AL | Member |
| • Laura Snyder | Paris, France | Member |
| • Cheryl Williams | Shelton, WA | Chair |
| • Gina Gray | Nichols Hills, OK | Member |

Members Absent

- Brandon Ruest N. Providence, RI Member

Staff

- Antoinette "Toni" Ross, TAP Program Analyst
- Conchata Holloway, TAP Program Analyst
- Fred Smith, TAP Program Analyst
- Michael Odom, Wage & Investment (W&I) Program Analyst
- Kevin Brown, Administrative Assistant
- Debra "Debbie" Awalt W&I Program Analyst

Chair Comments

Cheryl Williams welcomed everyone to the call.

Members of the Public

None

Quorum

Quorum was met.

Welcome Announcements/Acknowledgements

Cedric Jeans welcomed all attendees and opened the meeting.



National Office Report

English reported COVID-19 issues in some areas of the IRS and it being a slow process getting through this pandemic. English indicated that TAS is looking into ways to have videoconferencing but a decision on this will come soon. English spoke about Ad Hoc programs that will happening for the TAP very soon. There was a question about the deferment of payroll taxes to which English indicate guidance is not available for this yet. English will gather the news releases that are available and send it to the TAP very soon.

DFO Report

Jeans reported that we currently updating the Federal Advisory Committee Act (FACA) database. This includes program information such as recommendations, finances for the program and meeting information for TAP.

Jean mentioned that in preparation for the new member orientation training, we are accepting assistance from any returning members who want to be a part of this process.

Jeans reminded the committee that the TAP National Chair and Vice-Chair elections are coming up for next year's leadership. Moretti explained some of the duties that you have being in TAP leadership and encouraged returning members to take these responsibilities on. Jeans reminded the committee to reflect on the upcoming September 11, 2001 day of remembrance tomorrow.

Minutes Approval

August 13, 2020. Havey motioned; Russell seconded.

Action: Minutes approved as submitted.

Outreach Report

John Hughes shared the following updates for outreach:

- Special Projects had 100 percent submittal of activity reports for the third month in row.
- This committee is working on a lot of virtual outreach around the country.

Subcommittee 1 (International) Report

Havey reported:

- Issue 41749-Difficulties in Filing US Taxes from Outside the US
Mail is a huge issue due to time delays for international taxpayers going to and from the IRS. This referral seeks to resolve the problem of considerable delays in the mail delivery process for international taxpayers. The IRS should establish a way to track this mail that is sent to international taxpayers. A suggestion is to change the 120-day guideline for non-statutory deadlines. In addition, we are seeking to suspend the accrual of interest allowing time to deal with delays in the mail. Mail takes



too long to get to overseas taxpayer is a huge issue. Havey motioned; Hughes seconded.

Action: Issue elevated to the JC for consideration.

Subcommittee 2 (Identity Theft)

Hughes reported:

- Project Referral Issue 42213-IRS Online Account Forms Availability (**Committee agreed to drop issue and refer to Systemic Advocacy**)
- Project Referral Issue 43137-Verification/Validation During Interaction with the IRS (Questions being sent to Subject Matter Expert (SME)). Issue being worked.

Screening Committee

Snyder reported no issues referred out of 22 submissions. **Issue 43462** is being reviewed as a possible issue for subcommittee 1.

Internal Communications Committee (ICC)

Moretti reported enhancing and adding to social media using an online media guide. In coordination with Outreach committee, we are making new member check list currently. They are also working on the TAP Annual Report.

- TAP Newsletter article submission is due September 25, 2020
- The August TAP Newsletter was release on September 3, 2020

Ice Breakers

Q1. Would you rather ski on a mountain or vacation on the beach?

Q2. Would you rather be rich or famous?

Williams- Ski Famous
 Kleiber- Beach Rich
 Havey- Beach Rich
 Hughes- Beach Rich
 Moretti- Beach Rich

Russell- Beach Rich
 Snyder- Beach Rich
 Jeans- Beach rich
 Awalt- Beach Rich
 Odom- Beach Rich

Ross- Beach Rich
 Brown- Beach Rich
 Holloway- Beach Rich
 English- Beach Rich

Action Items

Antoinette Ross will do the following:

- Send minutes to be posted
- Issue 41749 for elevation

Awalt reported there is not a hotline number for social security withholding issue. They can call the regular 1040 line.

Chair or Vice Chair of SP Committee Closing Comment

Williams suggested considering the issues listed below as issues that can be worked and carried over into TAP Year 2021:



- Issue 42967 Simplify reporting taxpayer's fraud
- Issue 42978 Unfair filing tax cost fraud
- Issue 42996 IRS disregarding registered mail
- Issue 43054 Accounts are dysfunctional for nonresidents
- Consider the names of the subcommittees, as they can be changed

Closing

Jeans thanked everyone for attending, reminded members of the next JC meeting is on September 24, 2020, then closed the call.

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

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



**Special Projects Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
August 13, 2020**

Designated Federal Officer

- Cedric Jeans Designated Federal Officer

Members Present

- | | | |
|------------------------|----------------------|------------|
| • Michael Avery | San Juan, PR | Member |
| • John Hughes | Memphis, TN | Vice Chair |
| • Phillip Klieber | Roswell, GA | TAP Chair |
| • Robert “Bob” Moretti | Great Falls, MT | Member |
| • Richard Russell | Owens Crossroads, AL | Member |
| • Laura Snyder | Paris, France | Member |
| • Cheryl Williams | Shelton, WA | Chair |
| • Gina Gray | Nichols Hills, OK | Member |

Members Absent

- | | | |
|-----------------|-------------------|--------|
| • Dorothy Havey | Belfast, ME | Member |
| • Brandon Ruest | N. Providence, RI | Member |

Staff

- Antoinette “Toni” Ross, TAP Program Analyst
- Antonia “Toni” Keeling, TAP Program Analyst
- Conchata Holloway, TAP Program Analyst
- Fred Smith, TAP Program Analyst
- Michael Odom, Wage & Investment (W&I) Program Analyst
- Kevin Brown, Administrative Assistant
- Cynthia “Cindy” Jones W&I Supervisor
- Debra “Debbie” Awalt W&I Program Analyst

Welcome Announcements/Acknowledgements

Cedric Jeans welcomed all attendees and opened the meeting. Jeans noted a change to the agenda, Terrie English is out today, and he will fill in for her.

Chair Comments

Cheryl Williams welcomed everyone to the call.

Members of the Public

None

Quorum

Quorum was met.



National Office Report/DFO Report

The Joint Committee Planning session starts August 25-26, 2020 from 1:30-3:30 p.m., which is open to public. This meeting is working on TAP committee projects for the 2021 year. Jeans asked members to share with the Chair any projects or suggestions they may have for next year. There will be an All TAP Virtual meeting on August 17, 2021 at 1:00 p.m. ET, where the executive and deputy executive directors for Communications, Stakeholder Liaison & Online Services will be reviewing the IRS roadmap. All members are encouraged to join this call.

Jeans asked members to encourage taxpayers and tax professionals to attend the tax forums since TAP has a booth.

Minutes Approval

July 9, 2020 Special Projects Minutes were approved with corrections. Page 2, issue 41566, “in the bucket” was removed and now reads “**IRS said there is always room for improvement.**” Russell motioned; Snyder seconded.

Action: Minutes approved as amended

Outreach Report

John Hughes shared the following updates for the Outreach committee:

- Toolkit project is finalized and available on www.tapspace.org.
- Special Projects had 100% submittal of activity reports for the second month in row.
- Submit Activities reports by twenty-fifth of each month.

Hughes reminded members to submit their activity reports by the twenty-fifth of the month to send copy to Hughes, Ross, and TaxpayerAdvocacyPanel@irs.gov.

Subcommittee 1 (International) Report

Cheryl reported on Dorothy’s behalf:

- IRS Response to Issues 41526 and 41566- **Placed in monitor status to be followed up later this year.**
- TAP Referral for Issue 41749 –Delays in Delivery of Correspondence to Overseas Taxpayers- Ross will work with members to submit questions to the Subject Matter Expert (SME) to address this issue.

Subcommittee 2 (Identity Theft)

Hughes reported:

- Project Referral Issue 42213-IRS Online Account Forms Availability Williams noted that barriers should be identified before this referral moves forward to avoid delays by the IRS. This issue is tabled due to the need for input from a SME.
- Project Referral Issue 42419-Verification of Identify for Federal Tax Returns This issue is still being worked.



Internal Communications Committee (ICC)

Ross reported Gina Gray is the new committee member on ICC. Williams will work with Ross for this month's ICC report for the next newsletter.

Ice Breakers

If you could only have a choice of one on a sandwich which would you choose, avocado or bacon? Avocados were the favorite.

Action Items

Antoinette Ross will do the following:

1. Send amended minutes to Brown to be posted.
2. Monitor Issues 41526 and 41566.
3. Contact SME for meeting with Subcommittee 1 for issue 41749.
4. Collect committee questions by August 20, 2020, for the meeting.
5. Request SME for Issue 42213.
6. Work with Gina Gray on ICC and the newsletter.

Closing

Jeans thanked everyone for attending and reminded members of the All TAP virtual meeting on August 17, 2020 at 1:00 p.m.

**Next Meeting: Wednesday, September 10, 2020,
11:00 a.m. ET, 10:00 a.m. CT, 9:00 a.m. MT, 8:00 a.m. PT**

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



**Special Projects Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
July 9, 2020**

Designated Federal Officer

- Cedric Jeans Designated Federal Officer

Members Present

- | | | |
|-------------------|----------------------|------------|
| • Michael Avery | San Juan, PR | Member |
| • Gina Gray | Nichols Hills, OK | Member |
| • John Hughes | Memphis, TN | Vice Chair |
| • Robert Moretti | Great Falls, MT | Member |
| • Richard Russell | Owens Crossroads, AL | Member |
| • Laura Snyder | Paris, France | Member |
| • Cheryl Williams | Shelton, WA | Chair |

Members Absent

- | | | |
|-----------------|-------------------|--------|
| • Dorothy Havey | Belfast, ME | Member |
| • Brandon Ruest | N. Providence, RI | Member |

Staff

- Terrie English, TAP Director
- Antoinette “Toni” Ross, TAP Program Analyst
- Conchata Holloway, TAP Program Analyst
- Fred Smith, TAP Program Analyst
- Toni Keeling, TAP Program Analyst
- Annie Gold, Administrative Assistant
- Michael Odom, W&I

Welcome Announcements/Acknowledgements

Cedric Jeans welcomed and opened the meeting.

Chair Comments

Cheryl Williams stated the Committee is more than halfway through the year.

Member of the Public

None

Quorum

Quorum was met.

National Office Report

Terrie English welcomed all to the meeting and shared the following:

- The Tax Forums will start July 21, 2020 through August 20, 2020. Fred Smith, TAP Outreach Analyst sent an Email to members with information



to sign up. The Forums will be held virtually this year. There will be a chat room available. Members will sit in on the chat room and answer questions from Taxpayers. Smith will provide training and share information with members during the Outreach Committee meeting. Members were encouraged to respond to Smith with their interest and availability. The number of days and hours will be determined by the number of volunteers who agree to participate

- The Joint Committee has been asked to participate in answering questions for the Taxpayer First Act Office of the Internal Revenue Service. Information will be shared with members. The dates are July 15, 2020 and July 16, 2020. Kevin Brown will be sharing more information with each member. Members will be able to choose which day they would like to participate
- The Joint Committee will meet on July 23, 2020

DFO Report

Jeans shared the following:

- An article was published and released in the June Objective Report on www.TAPSpace.org showing some of the work being done in the public. It addresses all the topics that goes into the Annual Report. On page 72 and page 223 there is information on TAP. Members were encouraged to read over the report as there could be some information on projects and some concerns by the public being worked.
- Tax Filing deadline is July 15, 2020. If there are any questions, Jeans is available

Minutes Approval

June 11, 2020 Special Projects Minutes were approved with corrections.

Approval of IRS Responses

Williams shared the following response from IRS:

- **41566**, was not adopted. IRS said there is always room for improvement. It would require a regulation change. Full Committee held discussion on direction to take. Jeans explained this pursuant for regulation or legislative changes goes outside the mission of TAP. English suggested the committee forward to Systemic Advocacy to look at and to make sure TAP remains within the guidelines

Decision: Full Committee Consensus take the response back to the Subcommittee for possible rebuttal.

Action Item: Antoinette Ross will include English on the meeting for discussion

Outreach Report

John Hughes shared the following:

- The Activity Reports were at 100% submission for the month of June



- Outreach committee is currently working on updating the Outreach Toolkit and information organized to engage with Taxpayers

Subcommittee 1

Williams shared the update in Dorothy Havey's absence.

- A SME, Attorney Advisor and Systemic Advisor was invited to the International Subcommittee meeting for Issue **41749**, penalties may need a legislative change. Research was done to find the difference between statutory and non-statutory Notices. Full Committee discussion was held on direction to go with the issue. Subcommittee will continue to work on this issue and invite a SME to their August meeting
- Questions will be sent to Wage and Investments (W&I) requesting a SME on Issue **41526**, different languages and rejection by IRS. Ross will schedule the meeting with the SME once questions have been submitted
- **Issue 41565**, response on 8966 from IRS was received. The Subcommittee will work on a rebuttal

Subcommittee 2

John Hughes explained the status for Issues:

- **Issue 41535**, Practitioners Revealing Their Social Security Numbers (SSNs) was elevated to the Joint Committee but due to COVID-19 IRS is currently implementing a short-term solution that will be terminated at the end of the year 2020. The Subcommittee will table this issue and revisit at that time. More details will be added and resubmitted for a permanent solution
- **Issue 42213**, was received from the Screening Committee. It deals with a couple of issues. Subcommittee 2 is working on this issue. It involves gaining access forms online through an IRS portal
- **Issue 42419**, is a combination of three to four issues received from the Screening Committee on verifying Taxpayers identification on Federal Tax Returns. Subcommittee 2 anticipates having more information to report during the next Full Committee meeting

Internal Communications Committee (ICC)

Robert Moretti stated he attended the ICC meeting. There is a need to have a member take the lead on this committee as the representative. Discussions were held on the current project to upgrade www.TAPSpace.org and improve www.ImproveIRS.org There were a number of TAP members attending the call. Members were asked to submit a preview of what was being planned so that the contractors would be able to offer their expertise. It was suggested that New Members would take this opportunity to review and submit their questions or ideas.

- The contractors asked ICC to submit a project referral. ICC submitted project referral **43192**
- The other topic was getting excitement around Facebook. Members were asked to join if interested and look at the site



- The Newsletter has a deadline of the 25th of each month. Members with good ideas were encouraged to share the success stories
- Tax Forums participation responses are due back to Fred Smith. Williams added encouragement to members.

Action Items

Antoinette Ross will do the following:

- Forward approved June 11, 2020 Minutes to be posted
- Pull excerpts from 2018 ARC for rebuttal on Issue **41566**
- Receive questions from the Subcommittees on Issue **41566** and **41565**
- Invite SMEs to appropriate meetings
- Follow up on the Attorney Advisor SME that has been invited for Issue **41749** for Subcommittee 1
- Make sure Terrie is on the call for August 2020 meeting
- Moretti requested a copy of the Objective Report for review. Jeans will make sure a copy is provided.
- Hughes added make sure the July Activity Reports are submitted by the 25th of the month. Send a copy to Hughes, Ross, and the TAP email
- Williams encouraged members to consider being a part of the ICC as the representative. Moretti shared he would provide information to members.
- Williams will share published article she received to be used in the July Newsletter.

Closing

Jeans thanked everyone for attending and the meeting was officially closed.

**Next Meeting: Thursday, August 13, 2020,
11:00 a.m. ET, 10:00 a.m. CT, 9:00 a.m. MT, 8:00 AM PDT**

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



**Special Projects Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
June 11, 2020**

Designated Federal Officer

- Cedric Jeans Designated Federal Officer

Members Present

- | | | |
|-------------------|----------------------|------------|
| • Michael Avery | San Juan, PR | Member |
| • Dorothy Havey | Belfast, ME | Member |
| • John Hughes | Memphis, TN | Vice Chair |
| • Phillip Klieber | Roswell, GA | TAP Chair |
| • Robert Moretti | Great Falls, MT | Member |
| • Brandon Ruest | N. Providence, RI | Member |
| • Richard Russell | Owens Crossroads, AL | Member |
| • Laura Snyder | Paris, France | Member |
| • Cheryl Williams | Shelton, WA | Chair |
| • Gina Gray | Nichols Hills, OK | Member |

Members Absent

- | | | |
|-------------------------|---------------|--------|
| • Cassandra Knight-Page | Houston, TX | Member |
| • Cynthia Torres | Riverside, CA | Member |

Staff

- Terrie English, TAP Director
- Antoinette "Toni" Ross, TAP Program Analyst
- Antonia "Toni" Keeling, TAP Program Analyst
- Conchata Holloway, TAP Program Analyst
- Fred Smith, TAP Program Analyst
- Michael Odom, W&I Program Analyst
- Annie Gold, Administrative Assistant
- Tamikio Bohler, W&I Program Analyst

Welcome Announcements/Acknowledgements

Cedric Jeans welcomed and opened the meeting.

Chair Comments

Cheryl Williams welcomed everyone to the call.

Members of the Public

N/A

Quorum

Quorum was met.



National Office Report

Terrie English welcomed all to the meeting and shared the following:

- COVID-19 updates are being updated daily on www.irs.gov website
- Some IRS offices were opened only to close due to reported positive testing results for the virus
- Progress is moving forward with some of the Call Centers are re-opening. It will be some time before all is back to “normal”
- Business cards and ID Badges have been ordered but due to the 1111 Constitution Avenue office closure, they will be mailed out to members once the office has officially opened
- Tax Forums are a bulk of the Outreach. The Forums are being held virtually this year. Fred Smith is the Outreach Analyst and he will be sharing information how TAP members will be involved in the Forums. This information will be shared as quickly as possible
- The All TAP Virtual meeting will be held on June 18, 2020. Erin Collins, The National Taxpayer Advocate will be on the call. She will have a questions and answers session for members to interact with her
- The Joint Committee meeting will be held on June 25, 2020, at 1:30pm, EST and members are encouraged to attend. The TAP Chair Robert Moretti, Project Committee Chairs and Vice Chairs will be in attendance. This will give members an opportunity to see what goes on during the meeting and if there is interest in becoming a Lead or Chair

DFO Report

Jeans shared the following:

- The update for an issue where taxpayers wanted to file 1040X electronically is now being made available and should become accessible during the summer. Members were encouraged to look at the option on the www.irs.gov website and www.TAPSpace.org for virtual Outreach postings
- Rose Babb is away on a Detail and Annie Gold will be assisting. If there are administrative needs members were asked to contact Jeans.

Minutes Approval

May 14, 2020 Special Projects Minutes were approved with corrections.

Outreach Report

John Hughes shared the following updates for the Outreach committee:

- Currently working to update files for access to Outreach and any updated information
- Appreciation expressed to Laura Snyder for all the outreach she has done and contributing to the referral from Subcommittee 1 (International)
- Members were encouraged to submit their activity reports by the 25th of the month and to send copy to Hughes, Antoinette Ross, and TaxpayerAdvocacyPanel@irs.gov

Approval of IRS Responses

Williams shared the following:

- One response was received back from IRS on Issue 37212. This issue involved taxpayers trying to find information on Crypto-Currency. Alternate phrases were suggested to be added to the search parameters. IRS will implement on May 20, 2020. Members were encouraged to look at what is being implemented
- Issue 41411, IRS stated this issue is under consideration and to check back next year. Issue is placed in Monitor Status to follow up on next year

Decision: Full Committee Consensus to accept the IRS Responses

Subcommittee 1 (International) Report

Dorothy Havey stated Subcommittee 1 has been working on Issue 41749. This issue deals with extraordinary delay in getting notices to taxpayers living overseas. By the time the taxpayer gets the correspondence their response time has expired. Subcommittee 1's recommendation is to elevate this issue to the Joint Committee for consideration.

Decision: Full Committee Consensus elevate Issue 41749 to the Joint Committee

Subcommittee 2 (Identity Theft)

Hughes began with asking for clarification on the Systemic Advocacy (SA) and Attorney Advisor (AA) process. Jeans explained the process is where the Systemic Advocacy and Attorney Advisors would review the referrals to make sure there were no conflicting information or any thing that could possibly impact the recommendation. They also look to see if there are any conflicts with the initiation prior to going to the Joint Committee. The normal processing time is 30 days. Asking for expedited service could get the process rushed through.

- **Issue 41535**, Practitioners Revealing Their Social Security Numbers (SSNs) Practitioners should not have to reveal their SSN and/or date of birth for ID proof when contacting IRS when their clients are in the same room. The goal is to develop an ID number or some other process of identification to prevent revealing their personal information.

Decision: Full Committee Consensus elevate Issue 41535 to the Joint Committee for consideration

- **Issue 41296**, Quick Withdrawal Process of Power of Attorney (POA)'s from Form 2848. The Subcommittee reviewed and recommended the implementation of a faster or online withdrawal process be in place.

Decision: Full Committee Consensus elevate Issue 41296 to the Joint Committee for consideration

Screening Committee Report

Laura Snyder reported the Screening Committee had two meetings since the last Full Committee meeting. Some of the Issues have been combined relating to the same issue. The Screening Committee suggested the following:

- Subcommittee 2 have four to five issues related to ID verification and online accounts, claiming persons as dependents and fraudulently plus how protection has been placed on this, also how long it takes to process Spousal Returns
- Overseas Taxpayers: One issue allowing overseas taxpayers to submit simplified tax returns, how Notices of a Tax Debt is sent out that could trigger the revocation of a passport, how IRS sends out is it regular mail, how taxpayers can establish an online account, Tax Preparers are not competent. It was suggested IRS put in place guidance to ensure affordable and competent preparers
- Bob Moretti suggested once the issues are assigned to a subcommittee the subcommittee would decide. Jeans added the subcommittee would determine what issue to work from the Parking Lot. They would sort through the issues to associate and combine the like issues.

Action Item: Snyder will compile a listing with all the possible issues: 42907, 42879, 42967, 42978 and 42996 to be forwarded to members to determine which Subcommittee will work each issue.

Internal Communications Committee

Two volunteers are needed to represent Special Projects on the ICC. Ross stated the ICC discussed during their last meeting Social Media (Facebook to be exact). They currently have a Facebook group. ICC works on the Newsletter and collect articles from committees to go in the newsletter. The ICC meets once a month on the fourth Tuesday at 3:00pm EST. May 26, 2020 was the last meeting. Decision on who will be on the ICC will be tabled for next month's meeting.

Action Items

Antoinette Ross will do the following:

- Forward approved May 14, 2020 Meeting Minutes to be posted
- Wait for Snyder to forward the list showing the issues from the Screening Committee
- Follow up with an Email to members to send to Williams for volunteering for the ICC
- Update SAMS with the elevation of Issues 41749, 41535 and 41296 to be elevated to the Joint Committee after forwarding to SA and the AA
- Alert Committee if responses are received back from SA and AA

Closing

Jeans thanked everyone for attending and reminded members of next month's meeting. The meeting was officially closed.



**Next Meeting: Thursday, July 9, 2020,
11:00 a.m. ET, 10:00 a.m. CT, 9:00 a.m. MT, 8:00 a.m. PT**

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



**Special Projects Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
May 14, 2020**

Designated Federal Officer

- Cedric Jeans Designated Federal Officer

Members Present

- | | | |
|-------------------|----------------------|------------|
| • Michael Avery | San Juan, PR | Member |
| • Gina Gray | Nichols Hills, OK | Member |
| • Dorothy Havey | Belfast, ME | Member |
| • John Hughes | Memphis, TN | Vice Chair |
| • Phillip Klieber | Roswell, GA | TAP Chair |
| • Robert Moretti | Great Falls, MT | Member |
| • Brandon Ruest | N. Providence, RI | Member |
| • Richard Russell | Owens Crossroads, AL | Member |
| • Laura Snyder | Paris, France | Member |
| • Cynthia Torres | Riverside, CA | Member |
| • Cheryl Williams | Shelton, WA | Chair |

Members Absent

- Cassandra Knight-Page Houston, TX Member

Staff

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

Welcome Announcements/Acknowledgements

Cedric Jeans welcomed all and declared the meeting opened; he then turned it over to the Chair.

Chair Comments

Cheryl Williams welcomed all and proceeded with the agenda.

Roll Call

There were no public members on the call.

Quorum

Quorum was met for this meeting.

National Office Report

English welcomed all to the meeting and said the following:

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

DFO Report

Jeans shared the following:

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

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

Minutes Approval

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

Outreach Report

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



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

Approval of IRS Responses

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

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

Subcommittee 1 (International) Report out by Williams

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

Subcommittee 2 (ID Theft) Report out by Hughes

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

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

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

Screening Committee Report out by Snyder

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

Internal Communications Committee

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



Action Items

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

Closing

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

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



**Special Projects Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
April 9, 2020**

Designated Federal Officer

- Cedric Jeans

Designated Federal Officer

Members Present

- | | | |
|-------------------|----------------------|------------|
| • Michael Avery | San Juan, PR | Member |
| • Gina Gray | Nichols Hills, OK | Member |
| • Dorothy Havey | Belfast, ME | Member |
| • John Hughes | Memphis, TN | Vice Chair |
| • Robert Moretti | Great Falls, MT | Member |
| • Brandon Ruest | N. Providence, RI | Member |
| • Richard Russell | Owens Crossroads, AL | Member |
| • Laura Snyder | Paris, France | Member |
| • Cynthia Torres | Riverside, CA | Member |
| • Cheryl Williams | Shelton, WA | Chair |

Members Absent

- | | | |
|-------------------------|-------------|--------|
| • Cassandra Knight-Page | Houston, TX | Member |
|-------------------------|-------------|--------|

Staff

- Rose Babb, Management Assistant
- Tamikio Bohler, W&I Program Analyst
- Terrie English, TAP Director
- Antoinette Ross, TAP Program Analyst
- Ashley Halbash, CSO Program Analyst
- Debra Awalt, W&I Program Analyst
- Sheila Andrews, CSO Executive Deputy Director

Welcome Announcements/Acknowledgements

Cedric Jeans welcomed all and declared the meeting opened; he then turned it over to the Chair.

Chair Comments

Cheryl Williams welcomed all and proceeded with the agenda.

Roll Call

There were no public members on the call.

Quorum

Quorum was met for this meeting.



National Office Report

Terrie English welcomed all to the meeting and reported the following:

- The IRS is receiving daily updates on the COVID-19 pandemic including the Economic Stimulus Package.
- Be very vigilant to scammers pretending to be government employees.
- The new National Taxpayer Advocate (NTA), Erin Collins started last week; she will have a meet and greet via teleconference with TAS staff via teleconference on April 9, 2020.
- Any new updates gathered from the Stimulus package during the teleconference with the NTA for taxpayers will be shared with the TAP panel members.
- Members are encouraged to send emails with questions they may have to English.

DFO Report

Jeans shared the following:

- TAP Recruitment period has been extended until April 20, 2020 for the year 2021. Members are encouraged to share this recruitment effort with their neighbors and friends. Job announcement can be found on **improveirs.org**.
- News Release examples are available for members to tweak for their outreach events or for submission to member's local news outlets. Note that the new NTA, Erin Collins name should replace Nina Olson before distributing any literature to the public.
- If members are interested in conducting virtual outreach events and would like to make presentations, the TAP Staff can assist with setting up WebEx sessions. These events can be facilitated only during business hours, Monday through Friday 8:00am – 4:30pm Eastern time. Reach out to your TAP Analyst for assistance.
- For the latest updates on COVID-19, members were asked to subscribe to IRS.gov/COVID.
- Business cards were ordered and will be available in a few weeks; an email will be sent out to inform members once it arrives.

Minutes Approval

The draft minutes from the TAP 2020 Virtual Face to Face Meeting in March was approved for posting to improveirs.org.

Outreach Report

John Hughes informed the members that he will send an email reminder to submit their TAP Activity Reports by the 25th of each month. Hughes also mentioned to the members that they should tweak the TAP News Release letter and then send it to radio stations, newspapers, local groups, and the options for bulletin boards.

Approval of IRS Responses



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

Issue# 35185- International Future State- Tamikio Bohler will follow-up on the status of this issue which was submitted to the IRS in 2017. Ross will send supporting documentation to Bohler.

Issue# 35966- Deficient Options for Accessing Account Online- the committee agreed to do a follow up with Bohler on the status of this issue.

Issue# 37026- Prevention of ID Theft Relating to Refunds- the committee has accepted the IRS response.

Issue# 41230- Foreign Trust and IRS Penalty Notification for Late Forms- the committee has accepted the IRS response.

Issue# 41405- Tax ID PIN Request Process and Victim of ID Theft Issue Letter CP 5747C- the committee agreed to revisit this issue pending the new instructions received from the IRS.

Issue# 41566- TINS and GTNS -This issue will be discussed at the next full committee. Ross will put this final issue on next month's full committee agenda.

Subcommittee 1 (International) Report out by Williams

Issue# 41749 – Difficulties in Filing US Taxes from Outside USA- the subcommittee will review this issue with the assistance of a Subject Matter Expert (SME) at the next subcommittee 1 meeting. An update will be prepared for the next full committee meeting in May. Note the Issue #41749 has been combined with Issue 41752.

Subcommittee 2 (ID Theft) Report out by Hughes

Issue# 41535 - Practitioners Revealing Their Social Security Numbers (SSNs) – The subcommittee decided that this issue should be researched via Systemic Advocacy Management Systems, SAMS to determine if there are related issues. There will also be a follow up discussion at the next full committee meeting in May.

Issue# 41296 - Quick Withdrawal of Power of Attorney (POA)'s from Form 2848 – this subcommittee has requested that a SME be present at the next subcommittee meeting.

Screening Committee Report out by Snyder

Snyder reported that her committee is reviewing issues and will have their first meeting in April 2020 and will inform if there are any issues for both Subcommittees 1 and 2 at the next full committee in May.



Action Items

- Ross will forward approved final March 2020 Special Projects Meeting Minutes to the management assistant for posting to the Federal Register.
- Ross will request a Subject Matter Expert for both subcommittees to review Issues 41296 and 41749.
- Members can reach out to TAP Staff if they are planning any virtual outreach events and would like to use WebEx- assistance will be provided- contact the TAP Staff.

Closing

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

**The next Special Projects Committee meeting will be on
Thursday, May 14, 2020 at 11:00 a.m. -12:00 p.m. ET.**

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



**Special Projects Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
March 23, 2020**

Designated Federal Officer

- Cedric Jeans Designated Federal Officer

Members Present

- | | | |
|-------------------|-----------------------|------------|
| • Gina Gray | Nichols Hills, OK | Member |
| • Dorothy Havey | Lincolnton, ME | Member |
| • John Hughes | Memphis, TN | Vice Chair |
| • Robert Moretti | Great Falls, MT | Member |
| • Brandon Ruest | N. Providence, RI | Member |
| • Richard Russell | Owens Cross Roads, AL | Member |
| • Laura Snyder | Paris, France | Member |
| • Cynthia Torres | Riverside, CA | Member |
| • Cheryl Williams | Shelton, WA | Chair |

Members Absent

- | | | |
|-------------------------|--------------|--------|
| • Michael Avery | San Juan, PR | Member |
| • Cassandra Knight-Page | Houston, TX | Member |

TAP Staff

- Antoinette Ross, TAP Program Analyst
- Rose Babb, Management Assistant

Roll Call

There were no public members on the call.

Quorum

Quorum was met for this meeting.

DFO Welcome and Comments

Cedric Jeans welcomed everyone to the meeting. This is the first official meeting for the Special Projects Committee Meeting in this TAP year 2020. Jeans reviewed the agenda. Introductions of staff and members followed the announcements.

Cedric Jeans covered the TAP Mission



PowerPoint presentation:

TAP Member Procedures – Ross

Ground rules; members to be respectful, make specific suggestions; share information; all member participation; attack problems not people; okay to disagree; build a solid team; no sidebar conversations; one person at a time; put phones on mute when not talking; reach an agreement; consensus; meeting minutes and minutes approval process; establish meeting quorum; telephone and email etiquette; timeframes should be in the subject line; review and be prepared for meetings by referring to TAP Space for required pre-reads; turn in Activities Reports on time; a lot of communicating by email and some by phone; tools: WebEx & TAP Space; on calls please state your name when talking; please notate when emails need urgent attention in subject line and/or call us; attending calls is very important – notify the TAP Staff when you cannot attend a call and/or meeting;

Chair Nomination Presentation

Ross and Jeans presented information about the chair and vice-chair election process for the Special Projects Committee as well as subcommittee leads. Chair elections followed the presentation. Cheryl Williams was elected as Chair and John Hughes was elected as the Vice Chair. Laura Snyder was nominated for vice chair but, she stated that she felt her time would be better served on the Screening Subcommittee.

End of Day/Announcements

Jeans and Ross adjourned the meeting until Tuesday, March 24 for the second and final session of the Virtual Annual Meeting.



**Special Projects Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
March 24, 2020**

Designated Federal Officer

- Cedric Jeans Designated Federal Officer

Members Present

- | | | |
|-------------------|-----------------------|------------|
| • Gina Gray | Nichols Hills, OK | Member |
| • Dorothy Havey | Lincolnton, ME | Member |
| • John Hughes | Memphis, TN | Vice Chair |
| • Robert Moretti | Great Falls, MT | Member |
| • Richard Russell | Owens Cross Roads, AL | Member |
| • Laura Snyder | Paris, France | Member |
| • Cynthia Torres | Riverside, CA | Member |
| • Cheryl Williams | Shelton, WA | Chair |

Members Absent

- | | | |
|-------------------------|-------------------|--------|
| • Michael Avery | San Juan, PR | Member |
| • Cassandra Knight-Page | Houston, TX | Member |
| • Brandon Ruest | N. Providence, RI | Member |

TAP Staff

- Antoinette Ross, TAP Program Analyst
- Rose Babb, Management Assistant

DFO Welcome announcements

Cedric Jeans welcomed the members back to the 2nd and final day of the Virtual Annual Meeting and then turned the meeting over to the elected Chair, Cheryl Williams.

Roll Call

There were no public members on the call.

Quorum

Quorum was met for this meeting.

Minutes Approval

The draft minutes from the November 13, 2019 Full Committee meeting were reviewed and accepted as written by the full committee.

Meeting Dates and Times

Full Committee Schedule – 2nd Thursday, of each month **11:00 a.m. - 12:00 p.m. ET**



Subcommittee 1 (Internal) - Meeting Schedule – 1st Thursday, of each month
11:00 a.m. - 12:00 p.m. ET

Members:

Michael Avery
Dorothy Havey (**Lead**)
Robert Moretti
Laura Snyder
Cheryl Williams

Subcommittee 2 (ID Theft) - Meeting Schedule – 1st Thursday, of each month
12:00 - 1:00 p.m. ET

Members:

Gina Gray
John Hughes (**Lead**)
Cassandra Knight-Paige
Brandon Ruest
Richard Russell
Cynthia Torres

Screening Committee – Meeting Schedule – Ad hoc

Members:

Laura Snyder (Lead)
Cheryl Williams
Cynthia Torres

Internal Communications Committee – Meeting Schedule – TBD

Members:

Cassandra Knight-Paige
Brandon Ruest

Review of IRS Responses

Williams reviewed the following issues:

- Issue 35050 - Ineffective Communication Regarding ITIN Application Process- The committee agreed to accept the IRS response.
- Issue 35920 - IRS Check Endorsement- The committee agreed to accept the IRS response.
- Issue 35966 - Deficient options for accessing account online- Analyst Ross will consult with the JC Analyst, Martinez on this issue and report back to the full committee via email and subcommittee meeting.
- Issue 40785 - Filing threshold for Married Filing Separately- The committee is satisfied; and will accept the IRS response.

Project Committees

The committee reviewed the following:

Subcommittee 1 will work on:

- Issue 41752 – International Mail Problems and



- Issue 41749 – Difficulties in Filing US Taxes from Outside USA.

Subcommittee 2 will work on:

- Issue 41535 – Practitioners Revealing their SSN's and
- Issue 41296 – Quick Withdrawal of POA's from Form 2848

Action Items

- Internal Communication and Outreach Committees monthly schedules dates and times are to be determined.
- Screening Committee will be held as needed.
- Members are encouraged to conduct outreach virtually due to COVID-19. If members would like to make visual presentations, Jeans asked them to reach out to both him and Analyst Ross for assistance. This can be done Monday through Friday during business hours.
- Jeans encouraged returning members to become mentors to the new members. Returning members can review the rosters on TAPSpace and contact Analyst Ross for more information.
- Marketing materials distribution will continue to be mailed to members by request after the COVID-19 restrictions on telework are lifted.
- New and returning members should submit their requests for business cards and their preferences on the cards via email within the next 7 days.

Closing

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

The first Monthly Teleconference, Special Projects Committee will be on

Thursday, April 9, 2020 at 11:00 -12:00 p.m. ET.

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