



**2018 Meeting Minutes
Taxpayer Communications Project Committee**

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

**Taxpayer Communications Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
March 19, 2018**

Designated Federal Officer

- Terrie English Designated Federal Officer (DFO)

Attendance

- | | | |
|-------------------|--------------------|--------|
| • Ellen Bemis | Presque Isle, ME | Member |
| • Sheila Campbell | Washington, DC | Member |
| • Scott Hall | Georgetown, KY | Member |
| • Joe Martin | Jefferson City, MO | Member |
| • Carlos Rendo | Reno, NV | Member |
| • Ruth Tsujimura | Honolulu, HI | Member |

Attendance Via Conference Call

- | | | |
|-------------------|---------------|--------|
| • Sheila Olsen | Lawton, OK | Member |
| • Millicent Kasal | Lindstrom, MN | Member |

Absent Members

- | | | |
|-----------------|--------------|--------|
| • Ryan Johnson | Columbus, OH | Member |
| • April Tessmer | Austin, TX | Member |
| • Dan Smolnik | Hamden, CT | Member |

TAP/CSO Staff

- Terrie English, TAP Director
- Sheila Andrews, Deputy Director CSO



- Maryclaire Ramsey, Executive Director CSO
- Antoinette “Toni” Ross, TAP Analyst
- Robert Rosalia, TAP Analyst

IRS Staff via Conference Call

- Deborah Awalt, Wage and Investment (W&I)

Roll Call

Quorum was met at 3:30 p.m. MT.

Welcome/Announcements

Terrie English opened the meeting and introduced Toni Ross as the Taxpayer Communications (TCC) Project Analyst. Ross shared her background and her role with the committee. Ross conducted an icebreaker; she asked the members to tell two truths and a lie about themselves.

Sheila Andrews welcomed everyone to the meeting. This is the first official meeting for TCC in this TAP year 2018. Announcements were followed by self-introductions.

TAP Mission

English went over the TAP mission and vision, along with providing a general overview of the TAP Charter. English went on to describe the TAP Annual Report and how TAP is aligned with the Taxpayer Advocate Service (TAS). Members were provided the significance of the TAP objective of bringing the taxpayer perspective to IRS.

English explained the positions of the Designated Federal Officer/Official, Joint Committee (JC) analyst role, and chair and vice chair duties for the JC. She explained the analyst staff duties and IRS resources to assist TAP.

TAP Meeting Procedures

Ross covered Staff Roles and Responsibilities:

- Ground rules
- Respect for each other and methods of communications
- Meeting etiquette, agendas, pre-reads, and quorum requirements
- Telephone and email etiquette
- WebEx – Its use and importance of calling the conference number
- Minutes/minutes approval
- Agenda and pre-read Information
- TAPSpace/ImproveIRS.org/WebEx – logins into TAPSpace and explanation of how members access and navigate the website
- Activity reports/time reporting

Establish Quorum and Consensus



Ross discussed requirement to meet Quorum, as 50 percent of membership plus one to approve any action that requires a vote; such as referrals to IRS and meeting minutes. Quorum was met at 3:30 p.m. MT.

So, You Want to Be a Chair? Presentation

Ross conducted a presentation on chair and vice chair roles and responsibilities. A nomination process followed, as members on consensus nominated members for chair and vice chair positions.

Sheila Olsen, Lawton, OK, was elected chair. Sheila Campbell, Washington, DC, was elected vice chair.

Chair leadership bi-weekly calls will be scheduled with TAP Chair Sheila Olsen.

Establishment of Subcommittees and Meeting Dates

The following subcommittees were established along with meeting dates and time, as followed:

- Taxpayer Communications Committee Project Committee will meet the third Tuesday at 2 p.m. ET each month with April 17, 2018 being the first full official TCC meeting
- Subcommittee 1 – second Thursday at 2 p.m. ET
- Subcommittee 2 – first Thursday at 2 p.m. ET
- Screening Subcommittee: TBD

Identify Members for Subcommittees

Subcommittee 1

- Sheila Campbell; Scott Hall; Ryan Johnson; Joseph Martin; Carlos Rendo; Ruth Tsujimura (Lead)

Subcommittee 2

- Ellen Bemis; Millicent Kasal; Sheila Olsen; Dan Smolnik (Lead); April Tessmer

Screening Subcommittee

- Ellen Bemis (Lead); Sheila Campbell; Millicent Kasal; Carlos Rendo

Internal Communications Committee

- Sheila Olsen

Outreach Committee

- Sheila Campbell

Quality Review

- Joseph Martin; Ruth Tsujimura

Approval of Minutes

- Ellen Bemis motioned the November 2017 minutes to be approved, Scott Hall second the motion and the minutes were approved as written.



Members of the Public

No representative from the public present today.

New Issue Screening Training

Ross provided guidance around screening an issue and briefly explained the process. The members were informed they would get more training on the topic on Wednesday, March 21, 2018. Ross stated the screening committee will meet every month, with the date to be determined. Screening committee will determine what issues will be worked and shared with the full committee. If the screening committee drops an issue, an opposing member on the committee will provide additional information to the screening committee for re-evaluation. Ross provided additional examples on dropping an issue and when to take on an issue. Committee conducted screening training using a notated TCC screening report.

TAPSpace

Ross went live on TAPSpace; showed members how to navigate TAPSpace since this is where all member information is found and items can be uploaded. Question and answer session was held after the demonstration. Ross told members who have not updated their profile to do so and if they could not update to let her know so she can have the analyst in charge assist.

WebEx

Ross explained in detail what WebEx was and that TAP meetings will be conducted via WebEx. Ross reminded the members that the audio portion of the WebEx will always be the conference number and code (888-331-8226; Access Code: 7953272).

Closing

English closed out the meeting at 5 p.m.



**Taxpayer Communications Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
March 20, 2018**

Designated Federal Officer

- Terrie English Designated Federal Officer (DFO)

Attendance

- Scott Hall Georgetown, KY Member
- Sheila Campbell Washington, DC Member (Vice Chair)
- Joe Martin Jefferson City, MO Member
- Carlos Rendo Reno, NV Member
- Ruth Tsujimura Honolulu, HI Member

Attendance Via Conference Call

- Ellen Bemis Presque Isle, ME Member
- Sheila Olsen Lawton, OK Member (Chair)

Absent Members

- Ryan Johnson Columbus, OH Member
- Millicent Kasal Lindstrom, MN Member
- Dan Smolnik Hampden, CT Member
- April Tessmer Austin, TX Member

TAP/COS Staff

- Terrie English, TAP Director
- Sheila Andrews, Deputy Director CSO
- Maryclaire Ramsey, Executive Director CSO
- Antoinette "Toni" Ross, TAP Analyst
- Robert Rosalia, TAP Analyst
- Gary Lindsey, Wage and Investment (W&I)
- Debra Awalt, Wage and Investment (W&I)
- Jim Hannas, Wage and Investment (W&I)

Roll Call

Quorum was met

Members of the Public

No representative from the public present today.

Welcome/Announcements-DFO Terrie English

English welcomed everyone back to the meeting. She let them know about lunch arrangements, reviewed the agenda, and asked if anyone had any questions.



Wage and Investment Presentation (W&I)

Gary Lindsey of W&I did an overview about W&I. Lindsey is Tamikio Bohler's backup. He is a senior analyst in Atlanta. He is a Certified Public Accountant (CPA) and has been for 29 years. Lindsey and Bohler are liaisons for TAP in W&I, which is the largest business operation in IRS. They also handle identity theft, in addition to processing 152M individual returns; 48M business returns and 125M refunds. In 2017, IRS saved \$7-8B refunds due to identity theft.

2018 Project Focus Review (Presented to the Full Committee)

Issue 37087 – Digital Services – Customer Expectations

Presentation given by Jim Hannas of Wage and Investment (W&I) regarding digital services for taxpayers. IRS Communications has a new outreach that is more grassroots. Jim Hannas (is with the Online Account Based Services). He heads up the project management office which is focused on optimizing filings. He has 15 people on his staff. Online Account seeks feedback and as they receive feedback, they tweak their processes.

IRS is working to develop additional features such as the ability to submit amended returns electronically, a multi-year refund application, and access for tax professionals. Also, IRS is exploring other features such as an account-based penalty abatement tool.

Subcommittee 1 – Breakout Meeting

Issue 37087 – Digital Service – Customer Expectations

Subcommittee 1 – IRS launched its Online Account tool in November 2016 which provided access for individual customers to check their balance, submit payments, and establish installment agreements. Since the initial launch, IRS has been making regular product improvements based on user feedback and has added a recent payments table and transcript features. The Subcommittee 1 goal is:

- Provide insights into what additional digital services taxpayers want from IRS
- Consider which account-based issues are challenging for customers to resolve via traditional channels (telephone, walk-in, correspondence) and provide recommendations for additional digital services.

Discussion Summary

The Subcommittee 1 members wanted a listing of TAP's incoming issues. Rob Rosalia sent the information to Ross and it contained 451 issues. Ross will post to TAPSpace for their review. This listing was requested so the group can see what taxpayers' concerns are. They want to determine if some of their issues can



be represented on online services. The subcommittee will discuss further at their first Subcommittee 1 meeting on April 12, 2018.

Activity Reports

Ross showed and demonstrated how the TAP TCC Activity Report should be filled out. She let the members know that all activity reports should be completely filled out and sent to Taxpayeradvocacypanel@irs.gov, cc to Vice Chair Sheila Campbell, Kudiratu Usman and Antoinette.m.ross@irs.gov by the 25th of each month. Ross also let them know that she will send a “friendly” reminder on the 15th of each month.

Closing

English closed the meeting at 4:30 p.m.

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



**Taxpayer Communications Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
April 17, 2018**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer

Members Present

- | | | |
|-------------------|--------------------|------------|
| • Ellen Bemis | Presque Isle, ME | Member |
| • Sheila Campbell | Washington, DC | Vice Chair |
| • Scott Hall | Georgetown, KY | Member |
| • Joe Martin | Jefferson City, MO | Member |
| • Sheila Olsen | Lawton, OK | Chair |
| • Dan Smolnik | Hamden, CT | Member |
| • Ruth Tsujimura | Honolulu, HI | Member |

Members Absent

- | | | |
|-------------------|-----------------|--------|
| • Ryan Johnson | Columbus, OH | Member |
| • Millicent Kasal | Lindstrom, MN | Member |
| • Carlos Rendo | Carson City, NV | Member |
| • April Tessmer | Austin, TX | Member |

Staff Present

- | | |
|--------------------------|------------------------------|
| • Terrie English | TAP Director |
| • Susan Jimerson | Designated Federal Officer |
| • Lisa Billups | Program Analyst |
| • Antoinette "Toni" Ross | Program Analyst |
| • Matthew O'Sullivan | Program Analyst |
| • Tamikio Bohler | W&I |
| • Gary Lindsey | W&I |
| • Annie Gold | TAP Administrative Assistant |

Member of Public

None

Roll Call

Quorum was met

Opening/Welcome

Susan Jimerson welcomed everyone to the meeting. 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. Members 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 8:00 a.m. to 5:00 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 (FTF) 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 next year's FTF meetings. Members were encouraged to complete the survey.

The Joint Committee's (JC) first meeting will be held on April 25, 2018 at 1:00 p.m. ET. A vote to determine a new date for the monthly JC calls will be conducted at that time. Members are encouraged to call and listen in on the meeting. Ross sent out invitations for the Internal Communications Committee (ICC) first conference call. The first meeting is scheduled for April 24, 2018 at 2:00 p.m. ET. The selection of the Chair and Vice Chair will be done during this meeting and they will also set their meeting schedules. The 2017 TAP Annual Report has been sent out to each member. Let Ross know if you did 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. Late reports are accepted. Copies need to be shared with Ross, Vice Chair Sheila Campbell, and a copy goes to the TAP mailbox (taxpayeradvocacypanel@irs.gov).

National Office Update – Terrie English

Terrie English welcomed members to the call. She encouraged members to adhere to the meeting schedules. Members were also encouraged to make sure they are out recruiting to get more people involved with TAP. The local taxpayer advocates (LTA)s are looking forward to speaking with the members located in their states. As for the National Office Update, today, Nina Olson testified on the Hill which will be shown on C-SPAN. There will also be a link on www.ImproveIRS.gov to share the information. It should begin at 10:00 a.m. ET. The JC will discuss when they would like to move their meeting date during their first meeting on April 25, 2018.

Chair Report – Sheila Olsen

Sheila Olsen encouraged members to keep track of their outreach hours. Members are to keep track of all time doing research, speaking with individuals, going through emails or assisting the subcommittees and full committee or special committee work. Those hours do count and should be indicated on the report. Make sure to correctly annotate the time to give credit for the earned hours. Scott Hall has shared information on the awards.



Approval of Minutes

March 19-20, 2018 Face to Face Meeting Minutes approved as submitted.

Issue Report

Olsen opened the discussion on IRS responses

- **Issue 35819, Refundable Credit.** The committee discussed the IRS response. Dan Smolnik stated he would have liked to see a broader option. He was encouraged IRS provided a positive response. Ross added IRS responded to ID 1216 number 2. It leaves one still out for a response. IRS partially adopted the recommendation and proposed implementation on next year January 31, 2019. Discussion was held on the IRS response to the referral.

Action Item: Forward questions to IRS.

1. **What was the date EITC assistant first deployed?**
2. **Would it be available on IRS To Go?**
3. **What would the changes look like?**
4. **What communications plans are in place to reach out to taxpayers without computers or smart phones to interact with IRS?**
5. **Ross will contact the Subject Matter Expert (SME) to share additional input to the committee.**

Decision: Full Committee Consensus will table Issue 35819 for response to questions and discuss at the next month meeting.

- **Issue 36467, IRS To Go,** Committee discussed the IRS response and the attachment 1282. Ross stated IRS only have limited space on an application. Jimerson suggested the committee take time to review the remaining responses to discuss at next month's meeting due to time constraints.

Program Owner's Report

None

Subcommittee 1: Issue 37087-Digital Services

Ruth Tsujimura stated the subcommittee met last week. The subcommittee received a report of 451 issues that were in Systemic Advocacy Management System (SAMS). Ross divided all the issues among five members to see what issues could be better addressed using digital services. Tsujimura gave the members until May 4, 2018, to submit their findings to her. Tsujimura will consolidate the reports and forward to Ross before the May 10, 2018 subcommittee's next meeting.

Screening Committee Report

Ellen Bemis stated the Screening Committee met March 20, 2018, during the FTF meeting.

- **Issue 36680, Will be considered further**
- **Issue 36698, Dropped**
- **Issue 36700, Dropped**
- **Issue 36713, Dropped**
- **Issue 36714, Dropped**
- **Issue 36729, Dropped**
- **Issue 36732, Parking Lot, waiting for further information from submitter**
- **Issue 36765, Dropped**
- **Issue 36849, Parking Lot for further discussion**
- **Issue 36902 Dropped**

Screening Committee decided to hold meetings on an Ad Hoc basis. The next meeting is scheduled for Tuesday, May 1, 2018, at 2:00 p.m. ET.

Decision: Full Committee Consensus to accept the Screening Committee's report as stated.

Subcommittee 2: Issue 36491-Third Party Identification Protocols

Dan Smolnik stated they discussed several issues at their April 5, 2018 meeting. The subcommittee had a SME talk to them about Issue 36491. Inquiries were answered during the April 5, 2018 meeting. Publication 3 answers some of the questions the subcommittee has. The subcommittee also discussed **Issue 37272-Military Customer Services and Information Presented**, this issue was in response to the NTA, Nina Olson in her Annual Report to Congress on Tax information available to the military.

Outreach Report

Sheila Campbell reminded members to turn in Outreach reports by the twenty-fifth of the month. The next activity report is due April 25, 2018.

Action Items

Ross shared the following action items:

- Forward Committee's questions to IRS
- Update SAMS regarding issue approved by the members
- Send out approved face to face meeting minutes to be place onto the FACA Database

Closing

Susan Jimerson closed the meeting.

**Next Meeting: Tuesday, May 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.



**Taxpayer Communications Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
May 15, 2018**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer

Members Present

- Ellen Bemis Presque Isle, ME Member
- Ryan Johnson Columbus, OH Member
- Joe Martin Jefferson City, MO Member
- Sheila Olsen Lawton, OK Chair
- Dan Smolnik Hamden, CT Member

Members Absent

- April Tessmer Austin, TX Member
- Sheila Campbell Washington, DC Vice Chair
- Scott Hall Georgetown, KY Member
- Millicent Kasal Lindstrom, MN Member
- Carlos Rendo Carson City, NV Member
- Ruth Tsujimura Honolulu, HI Member

Staff Present

- Susan Jimerson Designated Federal Officer
- Antoinette "Toni" Ross Program Analyst
- Matthew O'Sullivan Program Analyst
- Debra Awalt Wage and Investment (W&I)
- Gary Lindsey W&I
- Annie Gold TAP Administrative Assistant

Member of Public

None

Roll Call

Quorum was not met

Opening/Welcome

Susan Jimerson welcomed everyone to the meeting and gave an overview of the agenda. Members were advised the WebEx system is not accessible until further notice. The system is being worked on and a message will be shared when it becomes available. The recruitment period has closed effective May 11, 2018. The applicants are being ranked to determine the best qualified. Once this process is completed, the administrative staff will begin contacting the applicants



to go into the system and schedule their interviews. Fred Smith, lead analyst for the recruitment process will put together an interview list for the interview panels. He will send out additional information to members who have already volunteered to be on the interview panel. Members who have not volunteered are encouraged to do so. Interviews are scheduled to begin June 4, 2018 through June 29, 2018. There may be a delay resulting in pushing this date back due to the application process being extended.

The Quarterly All TAP Member virtual meeting is scheduled for May 24, 2018, beginning at 2:00 p.m. ET. Members who plan to join the call were reminded to put the time on their activity report. The Joint Committee (JC) decided during their last month's call to change their meeting date from the last Wednesday of the month to the last Thursday of each month. The time remains the same. The next meeting is scheduled for May 31, 2018 at 1:00 p.m. ET. Members were encouraged to join in on the call. The Chairs of the Project Committees, the Chair of the Internal Communication Committee, TAP Chair, and Vice Chair make up the JC members. They are the voting members of the Joint Committee.

The Internal Communications Committee (ICC) held their first meeting on April 24, 2018. They are working on getting the Newsletter finalized to be released. The next ICC meeting is scheduled for May 22, 2018.

Chair Report – Sheila Olsen

Sheila Olsen stated the JC had their first meeting. The 2018 IRS Strategic Plan Meeting will be held on Tuesday, May 29, 2018. Members were encouraged to join the call. It will begin at 1:00 p.m. ET. Olsen reported during the JC on what Taxpayer Communications is currently working.

- **Issue 37087, Digital Services and Customer Expectations**, Subcommittee 1 is working the issue.
- **Issue 36491, Third Party Identification Protocol**, Subcommittee 2 is working this issue.
- **Issue 37272, Military Customer Service Information** was reported on by Nina Olson, National Taxpayer Advocate as a Most Serious Problem (MSP) in her Annual Report to Congress.

Ross added a request with questions on MSP and submitted to Tamikio Bohler who is currently waiting for the response. Olsen told members if they wanted to submit an article regarding outreach to be added to the TAP Newsletter, please send email to Sheila Campbell or Toni Ross with a copy to her.

Approval of Minutes

April 17, 2018 meeting minutes could not be approved due to quorum not met.

Program Owner's Report



Awalt confirmed all information requested from her had been received. Members are to submit any additional questions or request for information to Tamikio Bohler and Gary Lindsey.

Subcommittee Updates

Subcommittee 1: Issue 37087-Digital Services

Ross reported for Ruth Tsujimura in her absence. The subcommittee is working on a recommendation for adding a bullet on irs.gov under "Where is my Refund". They will be working on a referral about adding an additional bullet. Jimerson added the need for the subcommittee to discuss the content of the wording of the additional bullet.

Subcommittee 2: Issue 36491-Third Party Identification Protocols

Dan Smolnik stated the subcommittee discussed the Third-Party Authorization Protocol change. The change does not appear in the Internal Revenue Manual (IRM). The submitter has not heard any additional complaints regarding the issue and the group will discuss dropping this issue. **Issue 37272-Military Customer Services**-Nina Olson defined the Military Customer Service Issue as #13 on the MSP on her Annual Report to Congress. Smolnik added he had a discussion with two representatives from Wisconsin. He spoke with the Local Taxpayer Advocate (LTA) who informed him there have been few inquiries received.

Olsen is working with the LTA to make arrangements to visit the Veteran's Administration Hospital. They will speak with individuals on their experiences and tax issues. Olsen added the Military Legal Offices called Judge Advocate General offer an annual Volunteer Income Tax Assistance (VITA) training to all branches including those located in Korea, Japan and Europe. The program Owner's name is Major Wright. He is based out of Charlottesville; VA and the classes are held at the University of Virginia. Olsen has a teleconference scheduled with him tomorrow, May 23, 2018, to discuss the possibility of IRS attending training. She anticipates getting feedback and information on how the military tax returns will be affected. Olsen stated she works at a large Military VITA Site facility.

Screening Subcommittee Report

Ellen Bemis stated the Screening Committee rescheduled their meeting for May 29, 2018 at 2:00 p.m., ET. Millicent Kasal will no longer be a member on the Screening Committee due to her scheduling conflicts. If there is a member interested in joining the Screening Subcommittee. Ross will send out a message of interest to the full committee.

Outreach Report

Olsen stated Sheila Campbell is unavailable. Members were reminded to send in their activity reports. Accurate submission of hours is very important to get credit. The numbers are submitted for monthly and annual credit for the TAP program. Ross stressed to be mindful of the due date to get the activity reports in.



Outreach reports are due by the twenty-fifth of the month. The next activity report is due May 25, 2018.

Action Items

Ross shared the following action items:

- Get a Draft TAP Referral Form to Subcommittee-1 for their recommendations for the bullet under "Where's My Refund."
- Send updated Screening Report containing the April and May report.
- Send out email to members for any interest in participating on the Screening Subcommittee.
- Reminder members this was an administrative meeting and minutes will be voted on during next month's meeting.
- Jimerson will work on removal of non-participating member.
- Olsen will send copy of questions to Jimerson for point of contact person.

Closing

Susan closed the meeting.

**Next Meeting: Tuesday, June 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.



**Taxpayer Communications Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
June 19, 2018**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer

Members Present

- Ellen Bemis Presque Isle, ME Member
- Sheila Campbell Washington, DC Vice Chair
- Scott Hall Georgetown, KY Member
- Dan Smolnik Hamden, CT Member
- Ruth Tsujimura Honolulu, HI Member

Members Absent

- Ryan Johnson Columbus, OH Member
- Joe Martin Jefferson City, MO Member
- Sheila Olsen Lawton, OK Chair
- Millicent Kasal Lindstrom, MN Member
- Carlos Rendo Carson City, NV Member
- April Tessmer Austin, TX Member

Staff Present

- Terrie English TAP Director
- Susan Jimerson Designated Federal Officer
- Antoinette "Toni" Ross Program Analyst
- Debra Awalt Wage and Investment (W&I)
- Gary Lindsey W&I
- Annie Gold TAP Administrative Assistant

Member of Public

None

Roll Call

Quorum was not met

Opening/Welcome

Susan Jimerson welcomed everyone to the meeting and gave an overview of the agenda. Due to a posting error in getting the meeting onto the Federal Register Notice, today's meeting will be an administrative meeting. Any decisions that would require a vote will be postponed until next month's meeting. Dan Smolnik volunteered to lead the meeting.



- The recruitment phase is going very well. It will end on June 29, 2018. Appreciation was expressed to members who volunteered to assist on the Interview panels.
- The Joint Committee's next meeting is scheduled for June 28, 2018 beginning at 1:00 p.m. ET. Members were encouraged to join in and listen.
- The Joint Committee will have their Face to Face meeting on July 10-11, 2018. They will work on a strategic plan for next year to improve the overall TAP program. Members encouraged to sit in on the sessions. The meetings will run from 8:30 a.m. to 5:00 p.m. ET each day.
- June 21, 2018 the Outreach Committee will meet to discuss the outreach programs and strategies. The meeting will begin at 3:00pm, EST.
- June 26, 2018 the Internal Communications Committee will have their meeting. It begins at 2:00pm, EST. They will be working on the business cards revisions and other issues.
- The focus group finished working on the Tax Withholding Calculator commonly called the Paycheck Calculator. Members who volunteered to help do the review were thanked. The Executive summary was sent to the National Taxpayer Advocate (NTA) for her review. There will be comments posted with the outcome of the project on www.TAPSpace.org for members to view.

National Office Report – Terrie English

English stated she met with the Communication Stakeholder Liaison and Online Services (CSO). Members have been asked to volunteer and sit in on a conference call tomorrow. CSO will be rolling out a tax reform site and need feedback on how the site looks and if members feel it can be utilized. It will be a webinar presentation. Maryclaire Ramsey will be on the call. There needs to be at least 15 people to complete the responses. The call will begin at 12:00 p.m. ET June 20, 2018.

Chair Report

Jimerson stated the Chair Report will be done on next month's meeting.

Smolnik lead the discussion on the IRS response to Issue 35819-Refundable Credit Communications. He stated it was a positive response. IRS stated their online tools was adequate and accessible to taxpayers. A vote on whether or not the committee will accept IRS response will be done at next month's meeting.

Approval of Minutes

April 17, 2018 and May 15, 2018 Meeting Minutes could not be approved due to this meeting being an administrative meeting.



Program Owner's Report

Debra Awalt stated it was good TAP participated and looked at the Form W-4. The Information Reporting Program Advisory Committee (IRPAC) group discussed the W-4 and they had some concerns with the W-4 and the Online Tools. Members were thanked for their participation and encouraged to submit questions if they had any.

Subcommittee Updates

Subcommittee 1

Ruth Tsujimura stated the subcommittee finished the Refundable Tax Credit using three different mediums. Ross added the subcommittee will work on the draft referral to be presented at the next meeting.

Subcommittee 2

Smolnik stated he participated on June 12, 2018 in a Stakeholder Liaison meeting. During the meeting TAP was referred to as "Rock Stars". Smolnik thought it was good that they had heard about TAP. There are a lot of gratitude within IRS. The various reports on the withholding tools and itemized them. He relayed them to the group. They were appreciative. The military information connection issue was raised up to an audience of 60 or more. Smolnik also has asked to speak at the Veterans Administration during one or more of their events. Any suggestions on contacting anyone with information on the communications issue will be appreciated.

Screening Committee Report

Ellen Bemis stated the Screening Committee's recommendations for the following:

- **Issue 36701, Drop**
- **Issue 36732, Drop**
- **Issue 36831, Drop**
- **Issue 37063, Drop**
- **Issue 37281, Drop**
- **Issue 37282, Drop**
- **Issue 36939, Awaiting more information**
- **Issue 36942, Drop**
- **Issue 37062, Drop**
- **Issue 37372, Drop**
- **Issue 36667, Drop**
- **Issue 38510, Drop**
- **Issue 36903, Drop**
- **Issue 36992, Drop**
- **Issue 37065, Drop**
- **Issue 37192, Place in the Parking Lot**
- **Issue 38523, Assigned to Subcommittee 1 under Additional Services**



Outreach Report

Jimerson reminded members to submit their Activity Report in on time. Reports are due showing minimum to zero hours. The Activity Reports are used to summarize all the hours members spend on TAP related activities. The total hours are included in the Annual Report. The hours are also used to track the number of hours each member puts into the program. This will help determine the retirement dates and the type of Presidential Volunteer Award each member has earned. It is important to the success of TAP. The Activity Reports are due the twenty-fifth of each month. Members were encouraged to let the Analyst know if there has not been any contact with the Local Taxpayer Advocate (LTA).

Ross shared information concerning the TAP Business Cards received by ICC. The majority choice would be considered. Members were shown three cards to choose from. Smolnik suggested members send their choice to Ross over email. Jimerson added to share comments why that choice was chosen over the other two.

Action Items

Ross stated she will send email with business cards for members to make a choice and reminder to add comments as to why a specific choice.

Closing

Susan closed the meeting.

**Next Meeting: Tuesday, July 24, 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.



**Taxpayer Communications Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
July 17, 2018**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer

Members Present

- Ellen Bemis Presque Isle, ME Member
- Sheila Campbell Washington, DC Vice Chair
- Scott Hall Georgetown, KY Member
- Millicent Kasal Lindstrom, MN Member
- Joseph Martin Jefferson City, MO Member
- Sheila Olsen Lawton, OK Chair
- Dan Smolnik Hamden, CT Member

Members Absent

- Ryan Johnson Columbus, OH Member
- Carlos Rendo Carson City, NV Member
- April Tessmer Austin, TX Member
- Ruth Tsujimura Honolulu, HI Member

Staff Present

- Terrie English TAP Director
- Susan Jimerson Designated Federal Officer
- Antoinette "Toni" Ross Program Analyst
- Debra "Debbie" Awalt W&I
- Gary Lindsey W&I
- Annie Gold TAP Administrative Assistant

Member of Public

None

Roll Call

Quorum was met.

Opening/Welcome

Susan Jimerson welcomed everyone to the meeting. The committees are very busy getting their referrals completed and ready for the Joint Committee (JC). The committee was reminded there are four full committee meetings remaining until the end of the TAP year. Members were encouraged to finalize their referrals by September to get them through the process onto the JC before they have their final JC meeting in November. The recruitment interviews have all



been completed. Recommendations are being submitted to the TAP Management Staff. Information from the background checks are being completed. The selected applicants' information will be forwarded to the Nina Olson, National Taxpayer Advocate (NTA), for review and approval.

- The JC Strategic Planning meeting was held on last week.
- The JC will have their monthly scheduled meeting on July 26, 2018, beginning at 1:00 p.m. ET.
- The Outreach Committee's next meeting is scheduled for July 19, 2018, beginning at 3:00 p.m. ET.
- Internal Communications Committee's next meeting will be July 24, 2018, beginning at 2:00 p.m. ET.

Members were encouraged to attend scheduled meetings. Members participation is vital to the success of TAP's mission.

Chair Report

Sheila Olsen stated she sent an email to the committee with information from the JC's meeting held in Jacksonville, FL. There was a strong discussion on military customer service. She will share additional information with the committee. Some of the information may help subcommittee 2 in the work they are doing. There was discussion held relative to paying attention to specificity on the analysis portion of the referrals submitted. Members are urged to do the background research and incorporate any facts and figures. This message went across the board to all the TAP committees. Olsen sent a message to the subcommittee Chairs to help encourage members to be on the full committee calls for discussions and the importance of having quorum. If the date and time of the committee meetings are a problem, discussions on a possible change would be discussed to adhere to the commitment made by each member to volunteer. All suggestions will be welcomed.

Approval of Minutes

The following TCC Minutes were approved as submitted:

- April 17, 2018
- May 15, 2018
- June 19, 2018

Program Owner's Report

Debbie Awalt stated there are numerous individuals looking at the new tax law. A news article came out showing a sample of what the new F1040 will look like on next year. The W4 and the Withholding Calculator Tool on www.irs.gov is still being looked at. Testing and comments are being done internally on the www.irs.gov website. Members were encouraged to submit their feedback to TAP Staff after reviewing. The Internal Revenue Manuals (IRM)s are being updated for next year's filing season. Information will be coming out soon on IRS hiring. This will begin in the Fall for individuals to assist with answering telephone



calls for assistance with completing tax returns. Gary Lindsey stated the comment period for the F1040 will be expiring on July 27, 2018.

Subcommittee Updates

Subcommittee 1

Olsen stated on Ruth Tsujimura's behalf that the subcommittee was waiting for a response from Antoinette Ross to proceed with the completion of the draft referral. Olsen encouraged members to visit the Facebook page for possible tips on outreach activities. Members were encouraged to go onto <https://taxchanges.us>, a website where F1040 filers can view changes. It lets you know and see the F1040 draft. It allows viewing of changes. Olsen shared the site with taxpayers and received positive feedback. Taxpayers are able to access the Systemic Advocacy Management System (SAMS) online.

Subcommittee 2

Dan Smolnik stated the subcommittee is busy working on two things.

- Issue 37272 a referral was drafted that included Military Outline Service Information. The subcommittee is asking a Subject Matter Expert (SME) to be available to speak during the Volunteer Income Tax Assistance (VITA) meeting set for November in Charlottesville. Ross added there will be a SME present during the subcommittee's August 2, 2018 meeting. Jimerson suggested scheduling two separate meetings; one for a SME to speak during the VITA sessions and another to have the details on partnership in working with IRS. Smolnik will forward to Olsen a copy of the draft in progress for her input. Awalt agreed to have the concerns shared by the speaker.
- Smolnik stated an issue was sent in through the IRS website on elimination of the deductibility of all moving expenses. There is a need to figure out how to calculate the reimbursement or whether it is taxable.

Screening Committee Report

Ellen Bemis stated the Screening Committee's next meeting is scheduled for August 7, 2018, at 2:00 p.m. ET. Members were encouraged to be on the call. The Screening Committee submitted the report during last month's full committee meeting and it was reviewed.

Decision: Full committee Consensus accept the Screening Committee's Report as submitted.

- **Issue 36701, Drop**
- **Issue 36732, Drop**
- **Issue 36831, Drop**
- **Issue 37063, Drop**
- **Issue 37281, Drop**



- Issue 37282, Drop
- Issue 36939, Awaiting more information
- Issue 36942, Drop
- Issue 37062, Drop
- Issue 37372, Drop
- Issue 36667, Drop
- Issue 38510, Drop
- Issue 36903, Drop
- Issue 36992, Drop
- Issue 37065, Drop
- Issue 37192, Place in the Parking Lot
- Issue 38523, Assigned to Subcommittee 1 under Additional Services

Outreach Report

Antoinette Ross reminded members to submit their Activity Report on time. Reports are to be submitted even if showing minimum number of hours. The Activity Reports are due the twenty-fifth of each month. The reminders being sent out by Scott Hall have been good.

Action Items:

Ross stated she will

- Update SAMS to show the Screening Committee's Issues reported
- Send an invite to members to listen in on the Subcommittee 2's meeting scheduled August 2, 2018, where there will be an SME Q&A session

Closing

Jimerson closed the meeting.

**Next Meeting: Tuesday, August 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.



**Taxpayer Communications Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
August 21, 2018**

Designated Federal Officer (DFO)

- Lisa Billups Acting Designated Federal Officer

Members Present

- | | | |
|-------------------|------------------|------------|
| • Ellen Bemis | Presque Isle, ME | Member |
| • Sheila Campbell | Washington, DC | Vice Chair |
| • Sheila Olsen | Lawton, OK | Chair |
| • Dan Smolnik | Hamden, CT | Member |
| • Ruth Tsujimura | Honolulu, HI | Member |

Members Absent

- | | | |
|-------------------|--------------------|--------|
| • Scott Hall | Georgetown, KY | Member |
| • Millicent Kasal | Lindstrom, MN | Member |
| • Joe Martin | Jefferson City, MO | Member |
| • April Tessmer | Austin, TX | Member |
| • Ryan Johnson | Columbus, OH | Member |

Staff Present

- | | |
|--------------------------|-----------------------------------|
| • Lisa Billups | Acting Designated Federal Officer |
| • Antoinette “Toni” Ross | Program Analyst |
| • Debra “Debbie” Awalt | W&I |
| • Pamela Lowe | W&I |
| • Matthew O’Sullivan | Program Analyst |
| • Rose Babb | Management Assistant |

Member of Public

- Paul Merrion F-LEX US Tax Watch

Roll Call

Quorum was not met.

Opening/Welcome

Billups was the acting DFO for this meeting for Jimerson who is on a detailed assignment. She welcomed everyone and declared the meeting opened.

National Office Report

- Billups mentioned that the TAP staff is preparing for the conclusion of the TAP year.



- The Joint Committee (JC) planning meeting for the TAP committee Chairs was very productive in Jacksonville, Florida last month.
- Thanks to Olsen for her feedback at the JC meeting; Billups asked the members to send their thoughts and ideas on types of issues they would like to see worked in the TAP committees and regarding the TAP organization overall to Olsen. Olsen will share a blank proposal form with the full committee for feedback.
- The TAP new selections are being finalized; TAP is expecting the new members to come on board before the new TAP year. There will be many alternates coming on as well for the new TAP year.

Chair Report

Olsen asked members to ensure that they are communicating properly even if they are not available to join meetings. They should send a note to the Chair or Vice Chair of the committee and participate by sending in their input/recommendations.

Approval of Minutes

The minutes for July's meeting were not approved. Quorum was not met. The committee will bring both July and August minutes for approval at the next full committee meeting in September.

IRS Responses

Olsen asked the members if they had a chance to review Halls' email on Issue 35819- Refundable Credit response from the IRS. The IRS has partially adopted the issue for January of 2019. Members were asked to review and, provide their feedback. Ross mentioned that the members can send her their questions on what they would like to clarify.

Program Owner's Report

Awalt stated her office is working on tax reform and release of new Form 1040; she also stated that her office is in the process of updating the IRMs for tax season including W4 withholdings calculator.

Subcommittee Updates

Subcommittee 1

Tsujimura's stated that she prepared a draft on Digital Service component and that she is waiting for comments and will try to complete it soon. She also mentioned that this is her last year on TAP; Tsujimura mentioned that she would like to volunteer to mentor the new member from her state that will be selected for the TAP.

Subcommittee 2

Dan Smolnik stated his subcommittee has prepared a draft referral on Issue 37272 Military Outline Service Information.

Screening Committee Report

The following Issues status have been updated to:

- Issue 36543 and 36548, Transfer to TAC.
- Issue 37075 Transfer to TFP and Issue 39695 Transfer to Toll free.
- Issue(s) 37147, 37120, 36823, 36836, 36842, 36847, 36850, 39711, 39761 – Drop.
- Issue 39723 and 39764 have been placed in the Parking Lot until more information is gathered to determine if it will be workable.

Outreach Report

Ross stated that there was not much outreach for the month of July; she also mentioned that when submitting August activity report, the members should include June and July's report as well. She reminded the members that their activity reports are due on the twenty-fifth of each month.

Action Items:

- Ross will forward Hall's email on Issue 35819 to the full committee today; feedback is due by Monday, August 27, 2018.
- Publication 3 will be emailed to the full committee by W&I Analyst, Pamala Lowe, when it becomes available.
- TAP Elections for Chair and Vice Chair will be held in September; if interested in these positions; O'Sullivan and Olsen will be the contact persons.
- Think about stepping into leadership roles; members can contact Olsen and Campbell.
- Project proposal forms will be sent out by Ross to the committee to solicit feedback on what TAP committees should consider working on in the new TAP year.
- Paul Merrion, the public member requested a copy of Hall's email; Billups stated she will discuss his request with him after the call.

Closing

Olsen thanked the members for attending the call and Billups declared the meeting closed.

**Next Meeting: Tuesday, September 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.



Kevin Brown sent an invite to members with the call-in information. Billups shared an overview of the agenda for today's call. There will not be a National Office Report for this call as English is attending scheduled training. TAP TCC Vice Chair Sheila Campbell will sit in for Sheila Olsen who could not be on the call.

Chair Report

Sheila Campbell welcomed everyone to the call. The Chair Report will be given during next month's meeting. Billups shared with members the challenge with having quorum and not being able to approve minutes. The subcommittees have lost a few members during the past months. There will be a discussion on merging the two subcommittees. Members shared positive feedback to combine the two subcommittees. Campbell made the motion to combine the two subcommittees into one working group. Ruth Tsujimura and Scott Hall seconded the motion to merge. The full committee agreed it will be called the TCC Workgroup. They will meet on October 11, 2018 at 2:00 p.m. ET. Ross will send out the calendar invite and notice of subcommittee 2 meeting cancellation of their October 16, 2018 meeting.

Approval of Minutes

The following TCC Minutes were approved as submitted:

- July 17, 2018
- August 21, 2018

Program Owner's Report

Welcome back was expressed to Tamikio Bohler. Bohler stated there was no Program Owner's Report for this meeting and she is glad to be back.

Subcommittee Updates

Subcommittee 1

Tsujimura stated the subcommittee did have their meeting. A Digital Services write up was sent out to members. Ross added the group decided to drop the Digital Services and work on another issue. Information will be shared with everyone now that the subcommittees have been merged together into one working group.

Screening Committee Report

Ross stated the Screening Committee did not have their meeting. There was one issue received from Dan Smolnik. Further research is being done on this issue and it will probably go to another committee to work. The other issues are in the Parking Lot and the Screening Committee is waiting for additional research. Issue 35819-Refundable Credit, was sent to IRS Pamela Lowe and will be forwarded to Tamikio Bohler. Bohler stated it has already been sent out to the function for a response. The other issue with FAQ was forwarded to the IRS. Once the response is received back from IRS it will be added to the Agenda for the Work Group. Ross went over the FAQs that were sent to Bohler, W&I and



Online Services. Members were encouraged to submit any additional questions they may have to be added to the list. Hall suggested the search function on www.irs.gov may need to be worked on to adequately accommodate taxpayers in their search for information. Ross added she will route the concerns with the FAQs and the Search function to Online Services for their suggestions.

Outreach Report

Campbell stated she waiting to receive some of the August Activity Reports. Cedric Jeans sent outreach notice email on social media on August 13, 2018. He was directing individual to the Pay Check Checkup and the tax forms website and the F1040, Individual Tax Return Form of the changes to individual tax returns. There were several IRS tax forums held last month. Campbell attend the tax forum held in DC. There were over 1,000 taxpayers who attended. She handed out over 500 brochures and flyers with information on TAP and on how they could help support the mission. San Diego, CA Tax Forum held August 7-9, 2018. There were over 2,000 people in attendance. A lot of first year TAP members attended the tax forums. Scott Hall sent out the TAP Newsletters as a great outreach tool to use. Ross reminded members to submit their Activity Report in on time. Reports are to be submitted even if showing minimum number of hours. The Activity Reports are due the twenty fifth of each month. Campbell added Tsujimura completed her Activity Report with seven outreach hours reaching a total of 27 people. Hall attended the Joint Committee meeting on last month. He did 2.5 hours of outreach and shared the Newsletter.

Action Items:

Ross stated she will

- Send out the cancellation notice for subcommittee 2 meetings.
- Reschedule the meeting for October 11, 2018 for the TCC Work Group.
- Send information to the committee on discussion topics for the meeting.
- Submit approved committee minutes for July and August to be posted on the Federal Register and www.TAPSpace.org.
- Forward all responses from Bohler to the committee to be discussed.

Closing

Billups closed the meeting.

**Next Meeting: Tuesday, October 16, 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.



**Taxpayer Communications Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
November 20, 2018**

Designated Federal Officer (DFO)

- Cedric Jeans Acting Designated Federal Officer

Members Present

- Scott Hall Georgetown, KY Member
- Joe Martin Jefferson City, MO Member

Members Absent

- Ellen Bemis Presque Isle, ME Member
- Sheila Campbell Washington, DC Vice Chair
- Millicent Kasal Lindstrom, MN Member
- Sheila Olsen Lawton, OK Chair
- Dan Smolnik Hamden, CT Member
- Ruth Tsujimura Honolulu, HI Member

Staff

- Terrie English, TAP Director
- Cedric Jeans, Acting Designated Federal Officer
- Antoinette Ross, Program Analyst
- Matthew O'Sullivan, Program Analyst
- Tamikio Bohler, W&I
- Deana Johnson, TAS
- Annie Gold, TAP Administrative Assistant

Members of the Public

Paul Merrion

Roll Call

Quorum was not met.

Opening/Welcome Cedric Jeans

Jeans is Acting Designated Federal Officer in Susan Jimerson's absence. Due to quorum not being met, this meeting is an Administrative Meeting. There will be no decisions made on any official business. He shared an overview of the agenda. The approval of October and November's Meeting Minutes will be held over until the first meeting in 2019 during the TAP Face to Face Meeting. Antoinette Ross will facilitate the meeting. The face to face meeting is anticipated to be held in February or March of next year. Basic detailed information will be shared with the two members present. Jeans reminded members of the email sent to all members. Members are asked to provide their committee preference



and interest in becoming a mentor for the 2019 TAP year. Members were encouraged to review the email and respond appropriately. Volunteers are needed to assist new members coming onboard and mentoring. Members who are interested in helping with training during the face to face meetings should contact the managers or analysts. Sheila Olsen and Sheila Campbell are working on finalizing the Annual Report. Members were asked to submit any information that could be added in the report.

National Office Report Terrie English

English welcomed everyone to the call. A response has not been received back from the New Member Package. It was forwarded to Nina Olson, the National Taxpayer Advocate for approval. Once she has signed off, it will go to the Commissioner and on to Treasury. The staff is busy getting meetings scheduled for the new TAP year with the chair and vice-chair. The committee analysts will provide further information on the meetings. Information will also be available on www.TAPSpace.org for viewing. English wished everyone a Happy Thanksgiving Holiday.

Chair Report

No Chair Report was available.

Approval of Minutes

October 16, 2018 and November's TCC Minutes will be carried over to the first meeting in 2019 for approval.

Program Owner's Report

There was no Program Owner's Report for this meeting.

Public Comments

Paul Merrion asked to have the names of the newly elected chair and vice chair be provided. Jeans stated a Newsletter will be shared with all the information. The 2019 Chair is Heidi Hirschfield and the Vice Chair is Patrick (Pat) Kusiak. Jeans expressed appreciation to Merrion for sharing information about TAP through his Newsfeed. English will share Merrion's information with the chair to contact him for an interview.

Workgroup Report

Ross stated the TCC Workgroup has been working on the Inventory and deciding which issues to place into the Parking Lot to move over to 2019. The final decision will be done during the Face to Face due to lack of quorum for this meeting.

Screening Committee Report



Ross stated the Screening Committee decided to look at the Parking Lot Issues to determine which issues to drop or carry over to work in 2019.

Outreach Report

Ross stated she will send out a reminder email stating the Activity Reports are due by the twenty-fifth of the month. Members were advised to send the reports to the Vice Chair, Sheila Campbell and a copy to her as the analyst. It should be sent to the TAP email address. Joe Martin presented his report on time. Scott Hall stated he did not have any additional comments.

Action Items

Ross stated she will:

- Present the October and November minutes to the full Committee during the face to face meeting for approval.
- Follow up with the Workgroup working to determine which issues will be placed in the Parking Lot and carried over to 2019.
- Share good news on Issue 35819, Refundable Credit of the full adoption by IRS.
- Update the Annual Report with all the information.
- Place Issues already reviewed in the Parking Lot, do write up referrals and project proposals. Will have ready for the Face to Face discussion.
- Place in Systemic Advocacy Management System (SAMS) what the group decided on those Issues.
- Hall will send possible new issues from Outreach Activities in December to Ross.

Jeans expressed appreciation to Scott Hall on his retiring and continual service and participation. Members were encouraged to participate in the survey that will be sent out to members for feedback. This is the last full committee meeting. All full and subcommittee meetings are suspended until face to face training sessions. There will be an invitational email sent out prior to the meeting.

Closing

Jeans closed the meeting.

**Next Meeting: Face to Face 2019
(Dates to be determined)**

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