Special Projects Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
November 14, 2019

Designated Federal Officer
- Terrie English  Designated Federal Officer (Absent)
- Cedric Jeans  Acting Designated Federal Officer

Members Present
- John Hughes  Memphis, TN  Member
- Robert Moretti  Great Falls, MT  Vice Chair
- Richard Russell  Owens Cross Roads, AL  Member
- Laura Snyder  Paris, France  Member
- Cheryl Williams  Shelton, WA  Chair

Members Absent
- Gina Gray  Nichols Hills, OK  Member
- Kimberly Mason  Chicago, IL  Member
- Tiffany Mosley  Santa Monica, CA  Member
- Kristen Petersen  Colorado Springs, CO  Member

Staff
- Fred Smith, TAP Program Analyst
- Debby Awalt, W&I
- Rose Babb, Management Assistant

Roll Call
Quorum was met for this meeting. There were no members of the public on the call.

Opening/Welcome – Jeans
Jeans was the acting DFO for this meeting and he welcomed the members to the call.

National Office Report & DFO Report
Jeans reported the following:
- This is the last meeting of the year and he acknowledged the work of the full committee including the 2 members rotating off the panel.
- Currently, there are 55 panel members serving on the TAP; 18 are rotating off and, 28-30 new members will be joining the TAP in 2020.
- Susan Jimerson TAP West Chief has sent out 2 email to TAP members; one for 3rd year panel members requesting feedback on their committee preferences in the new TAP year and, the second email was sent to 2nd
and 3rd year members to solicit mentorship for new members. The deadline response to the mentorship program is November 15.

- There will be a retirement ceremony for the 3rd year members that are rotating off on November 22nd @ 11 a.m. ET. The Acting National Taxpayer Advocate and Communications Stakeholders Organization, CSO Executive Director will be joining the call.
- TAP Survey to solicit feedback on the program and staff services for the TAP year have been sent to the TAP membership. Members are asked to take a few minutes to respond to the survey questions; this helps TAP to make improvements to the program.
- TAP is working on the Regional Face to Face meeting for the new TAP year. There are a few locations being researched but have not finalized yet. A list of possible dates is also being worked on for the FTF and will be shared for feedback from the membership next month.

**Approval of Minutes**
The minutes for October’s meeting were approved by the full committee for posting to improveirs.org.

**Chair Report – Cheryl Williams**
Williams welcomed everyone and proceeded with the agenda for the call.

**Outreach Report**
Moretti mentioned the following:

- There is a great improvement in the submission of the Monthly Activity report. To date, there has been an audience of 1,230 with 170 hours of outreach.
- November will be the last newsletter for 2019. Williams volunteered to provide an article; the due date is 11/25.
- The TAP Annual Report was submitted to Analyst Gilbert Martinez for review; there were some grammatical errors identified.
- Continue to submit the Monthly Activity Report on the 25th of each month.

**Screening Committee**
Snyder reported that the following issues will be reviewed by Subcommittee 1 and a vote will be taken to elevate them to the JC next week.

- Issue # 41526 – IRS Forms/Expanded Foreign Language
- Issue # 41565 – TIN Matching with F8966 Under FATCA
- Issue # 41566 – TINs and GIINs

**Subcommittee Update**

**Subcommittee 1**
Richard Russell reported on the following issues:

- Issue # 41405 – Tax ID PIN Request Process and Victims of ID Theft Issued Form CP 5747C
Issue # 41411 – International Taxpayers Issue with Registering Online to Check Accounts

Both issues need some minor revisions that will be made; the full committee voted to elevate the issues to the JC contingent on the revisions for consideration.

Subcommittee 2
Williams reported that the following:
Issue 35920, IRS Check Endorsement
Some minor changes were made; this issue was already approved to forward to the JC – it will be returned to the JC subsequent to the revisions made for consideration.

Action Items
Smith will monitor the issues that will be elevated to the JC for consideration.

Closing Comments
This was the last teleconference meeting for the year.

Williams and Moretti thanked the members including those that are retiring for the work that they have done all year in the committee. Both also thanked the TAP Staff for their support as well and noted that it was a pleasure to see the staff face to face.

Smith thanked the members for their work, and he discussed their tasks and that he appreciated the work they have accomplished during the year.

Jeans thanked the members and especially the members that are rotating off the panel for their participation on the panel and for their assignments including outreach work all year. Jeans mentioned that TAP is working on an Alumni club for retired members.

Awalt expressed her appreciation to the TAP members for their commitment to the projects during the year.

Next Meeting: Date, time and city to be determined for the FACE to FACE.

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