Special Projects Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
September 12, 2019

Designated Federal Officer
- Cedric Jeans

Members Present
- Kimberly Mason, Chicago, IL - Member
- Robert Moretti, Great Falls, MT - Member
- Kristen Petersen, Colorado Springs, CO - 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
- John Hughes, Memphis, TN - Member
- Tiffany Mosley, Santa Monica, CA - Member

Staff
- Terrie English, TAP Director
- Cedric Jeans, Designated Federal Officer
- Fred Smith, TAP Program Analyst
- Rosalind Matherne, TAP Program Analyst
- Tamikio Bohler, W&I
- William Mezger, Taxpayer Advocate Service
- Paula Johnson, TIGTA
- Annie Gold, TAP Administrative Assistant

Members of the Public
N/A

Roll Call
Quorum was met

Opening/Welcome – Cedric Jeans
Jeans welcomed everyone to the call.
- Preparations are beginning for the presentations during the FTF training sessions. Returning Members will be asked to assist in the presentations. There will be an Email sent asking for volunteers to assist on the Wednesday when all Members are in attendance, at each location. If there
are any Returning Members who would like to assist, they are encouraged to let the Analysts or Jeans know.

- Recruitment is in the final stage of being approved. The names of the New Members will be share. Members are to watch for the Email on this information.
- Thank you to all Members who assisted with the Interviews. You are appreciated.
- Encouragement to get all Referrals completed and through the process. There are two months remaining until the end of the TAP year.

National Office Report – Terrie English
English welcomed everyone to the call. She stated the Commissioner sent a message of encouragement and remembrance of the lives lost and scared during the September 11th incident. Encouragement was shared to observe the National day with recognition and kindness by doing a selfless act. Members were thanked for their selfless acts in making IRS better for the Tax paying public.

- The 2020 TAP Elections for chair and vice chair positions is open. Members are encouraged to nominate or self-nominate for the positions. When nominating a person, contact the person and make sure they are interested in the position. There have been some great individuals in those positions and continue going forth.
- A celebration is being prepared for the Retiring Members from TAP. Members were asked to make sure a picture of each member is sent in to the Analyst.
- Activity Reports should all be turned in. The information is being compiled and added to the 2019 TAP Annual Report.

Approval of Minutes
August 8, 2019 minutes approved with corrections.

Chair Report – Cheryl Williams
Williams welcomed everyone to the call. Thank you to William Mezger, LTA for Seattle, WA for joining the call.

Screening Committee Report
Cheryl Williams stated the Screening Committee met on August 27, 2019. They are assigning one Issue 41280 Could IRS Provide a Way to Search By Employee ID Number to Subcommittee 2. Further research will be done through Robert Rosalia and Subcommittee 1 will report back to the Full Committee on findings. Action: Fred Smith will send calendar invite for the next Screening Committee meeting.

Subcommittee Updates
Subcommittee 1
Richard Russell stated Subcommittee 1 report
• The Ogden, UT Tax Return Processing Center issue should go to SA to be taken over by SA.

• On the Foreign Trust IRS Penalty Notices Form for late filing, the issue is there is a discrepancy on when the form should be filed by US owners of Foreign Trust without being accessed a penalty for not timely filing. Subcommittee 1 recommendation is to have the instructions be made clearer and IRS review and get them all in sync so they will be able to file timely without penalties. Need vote to move forward to IRS the Joint Committee.

  **Decision: Full Committee Consensus move forward to Joint Committee for review.**

• Issue 40164 TAP Representation for the US Virgin Islands, the Subcommittee reviewed the issue and found the TAP representative for Puerto Rico is responsible for representing the US Virgin Islands. The recommendation by the Subcommittee is to move forward with this issue. The TAP representative should remain the representative for Puerto Rico and the US Virgin Islands and more be done to reach out to them to assist them. Fred Smith clarified to move forward to the NTA to make sure the procedures are being followed.

  **Decision: Full Committee Consensus to forward Issue 40164 to SA for follow up on procedures and recommendations are not already in place.**

**Subcommittee 2**

Williams stated Subcommittee 2 has 4 Issue:

• Issue 36550, Mandatory IT will be closed as already resolved.
• Issue 35423, Victims of ID Theft the Subcommittee is still working on this issue.
• Issue 35920, IRS Check Endorsement the Subcommittee is still working on this issue.
• Issue 37026, The Prevention of ID Theft Related to Refund the Subcommittee recommendation is to move forward to the Joint Committee.

  **Decision: Full Committee Consensus to forward Issue 37026 to Joint Committee.**

**Outreach- Bob Moretti**

Moretti emphasized Members have an obligation of volunteering 2 to 300 hours. Due to the Government Shutdown, two months were lost. Members are encouraged to complete their Activity Reports. Moretti explained how he talks about TAP each day. Entering information daily is not conducive to daily tasks. He suggested once per month, sit down and enter what activity with the number of hours spent doing the activity.

• Moretti participated with his LTA for three days over two different events. One was visiting the LTA’s office to meet the Staff. Two days were spent
with a Vendor Stand Down in Great Falls, MT. He was able to meet a number of people who were in need of help with IRS issues. The LTA was very helpful. The minutes from meeting with the LTA was shared with the Full Committee.

• Gina Gray shared a situation where the LTA was able to help a homeless person with getting her Refund completed.
• Working on a shared Outreach and Internal Communications Calendar. When doing Outreach, add in the comments section what is being done and where the outreach will be.

**Action Items:**
Williams stated the Action Items:

• Forward two Issues to the Joint Committee; Issue 41230 and Issue 37026. Fred reminded the Members the Issues will go to the SA and Attorney Advisor and back to the Full Committee before being forwarded to the Joint Committee.
• Work Issues 35423, Issue 35920 and the new Issue 41280.

**Committee Chair and Vice Chair Closing Comments**
Williams shared the following activities she has participated in:

• Scheduled to be interviewed by the Honey Journal directly after today’s meeting.
• She had an article published in the EEA Journal. She will also try to get an Article in the Wall Street Journal.
• She went to Washington, DC earlier this month and met with the Commissioner of the IRS. She met with Mary Claire Ramsey, Deputy Director of TAP. They talked about reaching the under-represented population such as Native Americans, Handicap, LGBTQ, Religious groups. She met Kevin Brown, TAP National Office Administrative Assistant. She saw the President of the United States but did not speak with him.
• She will be running for 2020 TAP chair and Moretti will run for TAP vice chair.

Moretti applauded Kristen Petersen for assembling last month’s Newsletter.

• He is reviewing the Continuation Manual. There is a lot of talk on Social Media and a Facebook Website. Some Members have made comments on the Facebook Site.
• He has a short summary Article for September to submit for the monthly articles. Looking for a volunteer for October and November will be the last one.
• ICC is looking to develop a Content Library.
• Working on the Annual Report that comes out in the late summer.
Jeans reminded the Committee there will be an informational session on September 19, 2019 beginning at 3:00pm, EST. Members are encouraged to attend. Information will be shared on the duties and responsibilities of the TAP chair and vice chair. There is still time to send in nominations for the TAP chair and or the TAP vice chair position. Nominations should be sent to the Analyst, Smith or Jeans. A copy should also be sent to the TAP mailbox.

Closing
Jeans closed the meeting.

Next Meeting: Thursday, October 10, 2019
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.