



**Taxpayer Assistance Center (TAC) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
April 14, 2020**

Designated Federal Officer

- Susan Jimerson Chief, TAP West

Members Present

- Patrice Brown Brooklyn, NY Member
- Sheila Campbell Washington, DC Member
- Edward Donovan Holly Springs, NC Member
- Paula King Lexington, KY Member
- Ying Sa Des Moines, IA Member
- Thurston Smith Memphis, TN Vice Chair
- Kathryn Tracy Buckeye, AZ Member
- Nina Tross Apollo Beach, FL Chair
- Anthony Whitmarsh San Marcos, CA Member
- Jessica Wilson Byram, MS Member

Members Absent

- Licia Haynie Kaneohe, HI Member

Visiting Member

- Robert Moretti Great Falls, MT TAP Vice Chair

Staff

- Terrie English TAP Director
- Matthew O’Sullivan Program Analyst
- Debra Awalt Wage and Investment
- Tamikio Bohler Wage and Investment
- Annie Gold Administrative Assistant

Roll Call

Quorum was met.

Welcome

Susan Jimerson opened the meeting and welcomed everyone to the call. A review of the Agenda was shared.

- Outreach Committee will meet on April 9, 2020 beginning at 1:00 p.m. ET. The Lead for this committee is the TAP Vice Chair and is attended by all the Vice Chairs of the Project Committees
- Joint Committee scheduled meeting is on April 23, 2020 beginning at 1:30 p.m. ET. The call information has been posted on www.TAPSpace.org The TAP Chair, Project Committee Chairs will be attending. Members were encouraged to attend



- The Internal Communications Committee is scheduled for April 28, 2020 beginning at 3:30 p.m. ET. More information will be shared with the date and time

National Office Report

Terrie English welcomed everyone on the call and stated:

- The New National Taxpayer Advocate, Erin Collins shared a message during one of her meeting that is to be shared with Taxpayers to refer to www.IRS.gov for any information needed on the Stimulus payments and Coronavirus. Information is being updated hourly. TAP is instructed to direct all calls to TAS who will share the questions with IRS.
- Recruitment has been extended to April 20, 2020. This is a short window before the Recruitment period closes. Lisa Billups is available for questions members may have on how their state is doing.

Comments from the Public

None

Chair Report

Nina Tross added the website is being updated daily on multiple IRS feeds. There have been a good number of applicants received for the year.

Minutes for Approval

Tross stated March 2020 minutes will be approved during the full committee meeting in May. She also shared the process for approving the minutes.

There is a video available on www.IRS.gov on the qualifications of applicants for TAP membership. Robert Moretti added background investigations would be done and they are looking for a diverse team.

Member of the Public

None

Program Owner Report

Tamikio Bohler stated there are several areas listed in the newsroom to obtain information on the Coronavirus, stimulus payment and tax extended deadline. The Headquarters Analysts and SME are available to answer data requests. All questions should be submitted two weeks in advance. Do not contact the SME directly. Matthew O'Sullivan will reach out to the SME on members behalf. Mike Odom will be participating on the full committee calls. Bohler will send a list of contact names and information to O'Sullivan. Debra Awalt added during Outreach activities, members were encouraged to promote the filing season extension and direct deposit information should be added correctly. There are options for FreeFile information listed on www.IRS.gov

Subcommittee Reports

Subcommittee 1



- Sheila Campbell asked about the protocol for submitting a recommendation. O’Sullivan shared information for Issue 40513 Methods to Assist Taxpayers Who Visit a TAC Without an Appointment. The response received explained IRS is not accepting the recommendation. Subcommittee 1 will review and discuss their next move on this issue. They will bring the issue before for Full Committee for discussion in May
- O’Sullivan added information was received on Issue 40708 IRS Appointment but there was no contact information for the submitter to follow up for clarification on what was needed. Subcommittee 1 proposed closure of the issue

Subcommittee 2

Kathryn Tracy stated Issue 40782 Provide Google Maps Link for All TAC Offices was worked on by the committee in 2019. They completed the recommendation to include on the link a map for Taxpayers to locate the nearest TAC office. Linking the map was difficult. Screenshots were added to help IRS understand what they mean. They are requesting the full committee’s approval to move forward to the Joint Committee.

Decision: Full Committee consensus move Issue 40782 forward to Joint Committee for approval.

O’Sullivan added he will send the issue on to be added on the Joint Committee’s Agenda. He will also close Issues 40513 and 40708.

Outreach Report

Thurston Smith shared the following:

- The Outreach Reports are due to be in by the 25th of each month
- Copies are to be submitted to O’Sullivan, Smith and send a copy to TAPAdvocacypanel.gov mailbox
- Any activity done on behalf of TAP including conference calls, general conversations, monthly calls, preparations should be noted on the report
- Members were encouraged to submit ideas for the Newsletter to O’Sullivan and copy Smith. This is a great opportunity to get the word out.

O’Sullivan added

TAP’s assistance is needed to review and update SPEC’s training products previously approved. SPEC is asking TAP to solicit 1-2 members to serve on each of the teams below with the following competencies:

- Knowledge of federal tax laws for individuals
- Ability to interpret and write technical content for students
- Ability to work independently and with teams
- Self-motivated/self-starter
- Ability to meet deadlines

Meetings will be conducted virtually from 8:00am – 4:30. Tentative meeting dates are listed below for the teams.

Pub 4012, VITA/TCE Resource Guide – Used at the sites and conveys tax law in the form of interview tips, narratives, flow charts, diagrams, charts and graphs within the scope of the VITA/TCE programs.



5/19 - 5/21/2020

7/7 - 7/10/2020

Pub 4491, VITA/TCE Training Guide- Used by instructor and student participants in VITA/TCE to learn the tax laws necessary to prepare complete and accurate returns.

5/5 - 5/7/2020

6/16 - 6/18/2020

Form 6744, VITA/TCE Volunteer Assistor's Test/Retest - the certification product for volunteers wishing to assist taxpayers with basic, intermediate, advanced, military and international tax law issues within the scope of VITA/TCE programs. (Kathryn Tracy participated on this team last year. If she is still a member and available, we would love to have her participate again this year.)

5/12 - 5/14/2020

6/9 - 6/11/2020

7/21 - 7/23/2020

Understanding Taxes (UT) - an interactive tax education program for middle school, high school and community college classrooms. For Educators, every UT lesson includes the correlations to national and state educational standards. In addition to the criteria above, ***individuals with an educational background*** would be a great asset to this team. Meeting dates – TBD.

Action Items

O'Sullivan stated:

- Internal Communications Committee will meet week after next. The roster,
- Agenda and Web Ex invitation will be shared with members
- He will elevate Issue 40782 to Gilbert Martinez to be added on the Joint Committee's Agenda for this month
- The Screening committee will have their meeting during next week. Notification will be sent out later today

Closing

Jimerson officially closed the meeting.

**Next Meeting: Wednesday, May 12, 2020,
1:00 p.m. ET, 12:00 p.m. CT, 11:00 a.m. MT, 2:00 p.m. PT**

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