



**Taxpayer Assistance Center (TAC) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
August 11, 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
- Thurston Smith Memphis, TN Vice Chair
- Kathryn Tracy Buckeye, AZ Member
- Anthony Whitmarsh San Marcos, CA Member
- Jessica Wilson Byram, MS Member

Members Absent

- Licia Haynie Kaneohe, HI Member
- Ying Sa Des Moines, IA Member
- Nina Tross Apollo Beach, FL Chair

Staff

- Terrie English TAP Director
- Matthew O'Sullivan Program Analyst
- Rosalind Matherne Program Analyst
- Antonia Keeling Program Analyst
- Debby Awalt Wage & Investment
- Michael Odom Wage & Investment
- Annie Gold Administrative Assistant

Roll Call

Quorum was met.

Welcome

Susan Jimerson opened the meeting and welcomed everyone to the call. Terrie English could not attend this call. She provided an overview of the Agenda and shared the following scheduled meetings:

- Quarterly Virtual TAP meeting will be held on August 17, 2020 beginning at 1:00 p.m. ET. There will be virtual training and information shared on the current events happening within the TAP program.
- The TAC Screening Committee will have their meeting on August 18, 2020
- The Outreach Committee meeting will be held on August 20, 2020 beginning at 12:00 p.m. ET



- The Annual Planning Session for the Joint Committee will be on August 24, 2020. The Chairs of the Project Committees will all attend the session. They will review how the year has gone, the different projects for the upcoming year, discuss the presentative for the Chair and different items involving TAP. There will be two days of two-hour sessions on each day. The first session will be held on August 25, 2020 and the other one on August 26, 2020. They both will begin at 1:30 p.m. ET
- Joint Committee monthly meeting will be held on August 27, 2020 beginning at 1:30 p.m. ET. A report out from the various committees will be shared during the meeting along with any referrals for elevation to the IRS.
- A solicitation was sent out to each member asking for volunteers to participate on the 2020 Annual Report Committee. Members who did not receive the email were encouraged to let Gilbert Martinez the Joint Committee Analyst know. He will be facilitating the meetings and make sure the report is completed timely
- Internal Communications Committee (ICC) meeting is scheduled for August 25, 2020. They will work to reschedule the meeting due to a conflict with another meeting.
- TAP Interviews have all been completed. The package is being put together and background checks completed. It will be routed to through the approval process.

Chair Report

Thurston Smith welcomed everyone to the call. Matthew O'Sullivan provided updates on the following:

- On Subcommittee 1 they are working on **Issue 40462, Standstill with Transcripts and Innocent Spouse** and **Issue 40168, Verification Letter 5071C**
- Subcommittee 2 received a response back from IRS stating they will not be implementing the recommendation on **Issue 40782, Improvement to Taxpayer Assistance Center (TAC) Webpage with Addition of Google Maps**

Minutes for Approval

The following TAC Monthly Minutes were approved as submitted

- June 9, 2020
- July 14, 2020

Member of the Public

None

Program Owner Report

Michael Odom stated he has replaced Tamikio Bohler, who has moved to a different position. He looks forward to working with the Committee.

Screening Report



Patrice Brown stated the Screening Report reviewed out of one hundred Issues; Four were placed in the Parking Lot for further review, four were referred to other committees and the remaining were dropped.

Decision: Full Committee Consensus to accept the Screening Report as submitted.

Subcommittee Reports

Subcommittee 1

Sheila Campbell stated Subcommittee 1 has two issues on the Project Referral Form for the two issues. O'Sullivan shared the following

- **40462 Standstill with Transcript and Innocent Spouse.** Continuing research is being done on this issue. The Subcommittee found that when innocent spouse is entered on the www.irs.gov website search field it is directed to injured spouse issues on the same page.
- **40168 Verification of 5071C Letter.** Different members of the Subcommittee will do a review of the letter and the information and begin to structure the referral on this issue. O'Sullivan asked members of Subcommittee 1 if they have made any progress on this task
- O'Sullivan will do additional research and provide findings to the Subcommittee.

Subcommittee 2

Paula King provided the following report for Subcommittee 2:

- **Issue 40782 Improvement to Taxpayer Assistance Center (TAC) Webpage with Addition of Google Maps.** IRS issued their response and the Subcommittee is preparing a rebuttal. O'Sullivan has provided the necessary form to complete.
- **Issue 40310 Suggestion for Getting Transcripts.** There is a problem with validating the ID with the initial transcript. Sub-Committee 2 is revisiting the draft referral to include the information regarding the identity required for validating to get the transcript.
- Kathryn Tracy stated she wrote the rebuttal on **Issue 40782 Suggestion for Getting Transcripts** and forwarded it to O'Sullivan. He will forward a copy to the members of the committee. On **Issue 40310 Suggestion for Getting Transcripts**, she revised the draft referral to change the number of recommendations from one to two and added the second portion of the issue and forwarded it to O'Sullivan.
- O'Sullivan will do additional research on the rebuttal process and share with members. Anticipate finalizing during next month's meeting

VITA Project Review

Tracy shared the following:

The **Form 6744 Understanding Taxes Program** is the product that is the test certifying all VITA volunteers. A completed revised 2020 test was put together for all VITA volunteers. It is available on Link and Learn. The opportunity extended to TAP member was greatly appreciated to work on the project.



Outreach Report

Smith provided the following updates:

- A reminder to members to get the Activity Reports in. They are due by the 25th of each month
- Encouragement was given to always capture all activities relating to TAP including telephone calls, speaking with family members or emails.
- The emails Smith sends out regarding Outreach are effort to be helpful in reporting any Outreach activities. Any feedback would be appreciated.

Internal Communications Committee (ICC)

Smith stated the next ICC meeting date conflicts with another meeting and the meeting time was going to be changed.

O'Sullivan added

- He contacted the members of ICC and their decision was to postpone the meeting for one hour
- Emails was sent to each member for concurrence
- The change is a one-time occurrence
- Antonia Keeling has been very instrumental in getting the Newsletter out
- Discussions were held during the last ICC meeting, Concerning the restructuring of TAPSpace. The ICC determined to not take any actions on changing any status on Facebook until after TAPspace has been restructured. Once the restructuring has been completed, some of the issues on Facebook may be resolved
- Smith volunteered to write the article for September Newsletter submission

Action Items

O'Sullivan stated:

- Make sure information is shared with the subcommittees on the referrals they are writing
- Forward the approved Minutes for posting onto www.TAPSpace.org
- Update SAMS with the information from the Screening Report

Appreciation shared with members in attendance on today's call. Reminder to all, there are three Full Committee meetings remaining before the end of the TAP year

Roundtable

A brief discussion on submitting articles and referrals was held. Jimerson shared information on the process of writing an article for the Newsletter. Members are encouraged to members to contact TAP Management or Analysts with any questions or concerns.

Congratulations extended to Tamikio Bohler on her promotion.

Closing

Jimerson officially closed the meeting.



**Next Meeting: Wednesday, September 8, 2020,
1:00 p.m. ET, 12:00 p.m. CT, 11:00 a.m. MT, 10:00 a.m. PT**

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