



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

Designated Federal Officer

- Susan Jimerson Chief, TAP West

Members Present

- Edward Donovan Holly Springs, NC Member
- Paula King Lexington, KY Member
- Ying Sa Des Moines, IA Member
- Nina Tross Apollo Beach, FL Chair
- Jessica Wilson Byram, MS Member

Members Absent

- Patrice Brown Brooklyn, NY Member
- Sheila Campbell Washington, DC Member
- Thurston Smith Memphis, TN Vice Chair
- Kathryn Tracy Buckeye, AZ Member
- Anthony Whitmarsh San Marcos, CA Member
- Licia Haynie Kaneohe, HI Member

Visiting Members

- Robert Moretti Great Falls, MT TAP Vice Chair

Staff

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

Roll Call

Quorum was not met.

Welcome

Susan Jimerson opened the meeting and welcomed everyone to the call. She shared an overview of the Agenda and provided the following meetings schedules:

- Outreach Committee meeting July 16, 2020 beginning at 12:00 p.m. ET
- Virtual Tax Forum meeting July 21, 2020 through August 20, 2020
- Joint Committee monthly meeting will be held on July 23, 2020 beginning at 1:30 p.m. ET. It is an open meeting to the public and members are



encouraged to attend. Phillip Kleiber, 2020 TAP Chair, is the Lead for the Joint Committee. Robert Moretti, TAP Vice Chair also participates in the meeting

- Internal Communications Committee (ICC) meeting July 28, 2020. They work on the Newsletter and the internal projects relating to TAP

National Office Report

Terrie English welcome members to the call and reaffirmed the following:

- The Tax Forum will be held July 21, 2020 through August 20, 2020. Fred Smith sent information to members for volunteers to participate in the Tax Forum. The Tax Forums will be held virtually this year. There will be Chat Room and members will be covering the Chat Room. Members were encouraged to respond to Smith with a response on their availability. Training will be provided on assisting in the Chat Room for members who agree to participate
- Taxpayer First Act Office has asked the Joint Committee to be a part of their meeting on tomorrow
- July 15, 2020 Tax Filing Deadline. Members were encouraged to file and share information with individuals of the deadline
- The June Report to Congress is available on www.TAPSpace.org and members were encouraged to read the report. TAP was mentioned in the report

Chair Report

Nina Tross welcomed everyone to the call.

- Volunteers are still needed to participate in the Tax Forums. Members were encouraged to volunteer. Tross added she will respond to Smith
- She participated in the VITA program. They had their meeting on **Publication 4012 VITA/TCE Volunteer Resource Guide**. Working with VITA has been rewarding for Tross. They worked programs being developed and what goes on behind the scenes. They worked line by line on the Publications and updates on what is going on with Tax Law
- Members were encouraged to contact their LTAs for any virtual Outreach opportunities to participate in.

Minutes for Approval

June 9, 2020 minutes will be approved during next month's meeting due to lack of quorum.

Members of the Public

None

Program Owner Report

Tamikio Bohler stated W&I are reviewing outstanding Tax items. She announced her promotion to a different position and that there will be a backup person to fill in behind her to support TAP. She will work to close out items before the transition for the backup person.



Screening Report

Matthew O'Sullivan stated due to the committee not having quorum for this meeting, no decisions would be made on the Screening Report.

Subcommittee Reports

Subcommittee 1

O'Sullivan shared the following updates for Subcommittee 1

- Monthly meeting was held on July 7, 2020 where Edward Donovan did a presentation concerning some of the issues being worked on
- **40462 Stand Still with Transcript and Innocent Spouse.** Researched proved that when innocent spouse is typed in on the website it is directed to injured spouse issues. This is the confusion and Subcommittee 1 will do further research. The transcript issue confusion is if the original Tax Return filed is needed or is a transcript requested due to assessments, payments, etc. This will continue to be researched
- **40168, Verification of Form 5071C** Sheila Campbell will report on this issue next month
- Committee members reminded a volunteer will be needed for the Newsletter article submission

Subcommittee 2

Paula King provided the following report for Subcommittee 2 on one issue:

- **40310 Suggestion for Getting Transcripts,** working to change the language for needing to make an IRS appointment online. Clarification needed on how to get a transcript and pay for the transcript online. Subcommittee 2 is working on the recommendation and will present to the Full Committee during next month's meeting.

Outreach Report

Tross reminded members Thurston Smith is responsible for collecting the Activity Reports. They are due by the twenty-fifth of each month. The reports are used to track hours volunteered.

Moretti added:

- Outreach Toolkit in www.TAPSpace.org with twenty-three folders for TAP members. He is working with Cedric Jeans to update the folders.
- A contractor who is working on modernizing www.TAPSpace.org and the website.
- The Activity Reports and Newsletter articles are due by the twenty-fifth of each month

Internal Communications Committee

Tross stated the Newsletter articles are due by the twenty-fifth of each month. Ying Sa did a wonderful job on the article submitted for the month of June. Tross will submit the article for the month of July.

Action Items

O'Sullivan stated:



- Complete a new Screening Report and determine if there are similar items that could be grouped together or associate together and share with members for next month's meeting
- The Screening Committee meeting is scheduled for July 21, 2020

Roundtable

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

Congratulations extended to Bohler.

Closing

Jimerson officially closed the meeting.

**Next Meeting: Tuesday, August 11, 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.