



**Taxpayer Assistance Center (TAC) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
June 9, 2020**

Designated Federal Officer

- Susan Jimerson Chief, TAP West

Members Present

- | | | |
|---------------------|-------------------|------------|
| • Sheila Campbell | Washington, DC | Member |
| • Edward Donovan | Holly Springs, NC | 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

- | | | |
|-----------------|----------------|--------|
| • Patrice Brown | Brooklyn, NY | Member |
| • Paula King | Lexington, KY | Member |
| • Ying Sa | Des Moines, IA | Member |
| • Licia Haynie | Kaneohe, HI | Member |

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 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 June 18, 2020 beginning at 12:00 p.m. ET. The TAP Vice Chair Robert Moretti is the Lead for the Outreach Committee and will be attended by the Vice Chairs of the Project Committees
- All TAP Member Virtual Meeting June 18, 2020 beginning at 2:30 p.m. ET
- Internal Communications Committee (ICC) meeting June 23, 2020 beginning at 3:00 p.m. ET. They will work on the Newsletter and the Facebook page. The Newsletter was sent out to members on Friday



- Joint Committee monthly meeting will be held on June 25, 2020 beginning at 1:30 p.m. ET. Phillip Kleiber is the Lead for the Joint Committee and attended by Project Committees Chairs and Vice Chairs
- Interview phase of Recruitment is in process. Interviews are being conducted and expected to be completed by the end of the month. There are some very good candidates being interviewed.

National Office Report

Terrie English welcome members to the call.

- IRS offices are beginning to open but not at full capacity. Some of the campus site employees are working to get documents out to Taxpayers.
- Status of member receiving Business cards and ID Badges are being delayed due to the office closures. Kevin Brown will be mailing the Business cards to members upon return to the office
- Members were reminded there should be no Outreach done in person but virtually is recommended
- The All TAP Member Virtual meeting will be held on June 18, 2020. There will be training provided for members. The National Taxpayer Advocate, Erin Collins will be attending. She is very interested in TAP. She will be sharing some of her expectations of TAP and there will be a question and answer session
- Members were encouraged to attend the Joint Committee meeting scheduled for June 25, 2020 at 1:30 p.m. ET

Chair Report

Nina Tross stated she made the initial contact with her LTA in Florida to plan and schedule Outreach activities on their calendars.

- 2020 Tax Forums have been cancelled but will be held virtually
- There will several weeks and will be 30 hours of CPE held virtually

English added information would be shared on how Fred Smith, who is over the Outreach Coordinator will be able to interject TAP into the Forum.

Minutes for Approval

- May 12, 2020 minutes approved with correction

Members of the Public

None

Program Owner Report

Michael Odom stated there were no updates at this time.

Screening Report

Matthew O'Sullivan shared the following updates for the Screening Report Issues. The Screening Committee was unable to finish their review.

- Issues were dropped; referred to IRS on COVID-19, were individual issues, some were sent over to other Committees, others were dropped due to IRS had already resolved and some were placed in the Parking Lot



- There were over 200 Issues remaining
- Multiple meetings will be scheduled to finalize the Screening Report

Decision: Full Committee Consensus accept Screening Committee's report as presented.

Subcommittee Reports

Subcommittee 1

Sheila Campbell stated Subcommittee 1 had their meeting on June 2, 2020. Edward Donovan, Nina Tross, Jimerson, O'Sullivan and Rosalind Matherne were in attendance. Subcommittee 1 reviewed and determined to work Issue 40462 and Issue 40169, do further research while awaiting IRS response and drop issues:

- **40462 Stand Still with Transcript and Innocent Spouse**
- **40169 2017 Refund** submitter advised to contact IRS
- Other issues will be dropped

Decision: Full Committee Consensus accept Subcommittee 1 report as stated.

Subcommittee 2

Matthew O'Sullivan provided the following report for Subcommittee 2:

- **40782 Provide Google Maps Link For All TAC Offices**, waiting response by June 20, 2020
- **40310 Suggestion for Getting Transcripts**, working on doing more research
- **40311 Debit Card Verification when getting Transcripts**, placing in Parking Lot and following up with Special Projects Committee for similar issue
- **40698 Modify VITA Training to Include HSA Issues**, awaiting response from IRS due by mid-December
- **40699 Expand VITA Scope to Include OIC Issues**, after receipt of IRS response, Subcommittee 2 determined issue has been resolved
- **41706 Kiosk in Public Location**, follow up with IRS on resolving this issue

Decision: Full Committee Consensus accept Subcommittee 2 report as presented.

Tross asked for any updates on the **2020 VITA Project Review**. Kathryn Tracy added she is waiting to hear back on her desire to be involved with the review. O'Sullivan stated he received a reply from IRS and will share with the Full Committee upon reviewing. Tross will share information she received from VITA as well. English added she sent an inquiry for information and it will be shared with the Committee when a response is received.

Outreach Report

Thurston Smith stated he has been serving on the Interview panel and it has been an enjoyable experience. He shared the following Outreach Report where he has been charged with reviewing four content areas:



- Project Committee Conference Call
- Monthly Conference Call News Release, Reviewed and updated with appropriate language and shared with Robert Morretti
- Letter Head Blank Template, review completed
- Telephone Guide, recommendations are there for updating. A form of the format is needed
- Members were reminded to submit their Outreach Activity reports to O'Sullivan, Smith and to the TAP Address. The reports are due by the 25th of each month
- Continue sharing documents with Outreach and TAC. It is very useful. Smith shared a copy of the PowerPoint Newsletter with members

Internal Communications Committee

Tross stated Internal Communications Committee is the Newsletter. Members were encouraged to participate. The Newsletter articles are due by the 25th of each month.

Action Items

O'Sullivan stated:

- Forward approved Minutes will be posted to www.TAPSpace.org and sent to Kevin Brown for posting onto www.ImproveIRS.org
- Update Screening Report and Subcommittee1 and Subcommittee 2 Issues in SAMS
- Gather information and provide to members as requested on the VITA Project Review

Roundtable

- Tracy inquired on the status of elevated Issue 40782 that was presented by Subcommittee 2 to the Joint Committee. Tross informed the Committee the Joint Committee did accept and it was forwarded to IRS for consideration. Jimerson reminded the Committee, IRS has time to respond. They are still within their timeframe.
- Tross encouraged members to participate during report outs and suggested during next month's meeting, allow time for all members to speak. Jimerson agreed this was a good idea. It would benefit New Members.

Closing

Jimerson officially closed the meeting.

**Next Meeting: Tuesday, July 14, 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.