



**Taxpayer Assistance Center (TAC) Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
May 12, 2020**

**Designated Federal Officer**

- Susan Jimerson Chief, TAP West

**Members Present**

- Patrice Brown Brooklyn, NY 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**

- Sheila Campbell Washington, DC Member
- Licia Haynie Kaneohe, HI Member

**Visiting Member**

- Robert Moretti Great Falls, MT TAP Vice Chair

**Staff**

- Matthew O'Sullivan Program Analyst
- Rosalind Matherne Program Analyst
- Michael Odom Wage & Investment
- Tamikio Bohler Wage & 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. Terrie English could not be on the call to provide the National Office Report. The upcoming meetings are as follows:

- Joint Committee monthly meeting is scheduled for May 28, 2020 beginning at 1:30 p.m. ET. The meeting is open to the public.
- Internal Communications Committee (ICC) next scheduled meeting is on May 25, 2020 beginning at 3:00 p.m. ET. They have elected their Chair and will go over the projects they are working on.
- Thurston Smith will give a report on the Outreach Committee



- National Office will be scheduling their Quarterly All TAP meeting for June. More information will be shared with the time and date as it becomes available
- Recruitment Interviews will begin at the end of May. There will be a solicitation going out to members to participate in the interview sessions. Lisa Billups will send an Email to members with the information.

### **Chair Report**

Nina Tross welcomed everyone to the meeting. The VITA Project is seeking volunteers to participate. TAP members were encouraged to reach out to their local LTAs for any activities scheduled to possibly attend and help with Outreach activity.

### **Minutes for Approval**

- March 23 - 24, 2020 minutes approved with correction
- April 14, 2020 minutes approved as submitted

### **Members of the Public**

N/A

### **Program Owner Report**

Tamikio Bohler stated there were no updates at this time.

### **Screening Report**

Patrice Brown shared the following updates for the Screening Report Issues. Several issues were dropped and others were kept to gather additional research:

- **41477 Form 433-A Reviewing Installment Agreement** , Taxpayer received Form 4338 with ten days to respond, could not get in contact with IRS. Received a second notice to reach out to IRS. They will be contacting IRS for information
- **41527 Failure of the IRS Web Site** , Taxpayer had issues with the Direct Pay system. O'Sullivan attempted follow up with Taxpayer with no response. Revisit during next month's meeting
- **41706 Quality of Service, Confidentiality, Privacy.** Taxpayer referred to virtual terminal and concern with privacy at the terminal. They will do more research on this issue.
- **41540 Open Season For IRS Advisory Committees.** Taxpayer wanted to know of an easier way to obtain information on the Taxpayer Advisory Committee.

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

### **Subcommittee Reports**

#### **Subcommittee 1**

O'Sullivan stated Subcommittee 1 had their meeting on May 5, 2020 and reviewed the following Issues:

- **40708 IRS Appointment**, IRS provided a response Taxpayers are not considered missed appointment until fifteen minutes late. Submitter did

not provide contact information for follow up. Subcommittee 1 recommended this issue be Dropped.

- **40634 Refund** and **40404 Taxes** deal with Taxpayers wanting to receive their refunds quicker. IRS has a normal twenty-one days for processing. Dropped
- **40462 Stand Still With Transcript and Innocent Spouse**, deals with transcript and Innocent Spouse. Subcommittee 1 will do further research on this issue
- **40169 2017 Refund**, Delays in getting refunds out due to possible ID theft. Will consult with Special Projects. Subcommittee1 will keep this issue
- **40618 Au pair - Taxes**, Verification For 5013C, Subcommittee 1 will follow up with Special Projects Committee for any additional information
- **40513 Methods to Assist Taxpayers Who Visit a TAC Without an Appointment**, Visiting TAC without an appointment. Subcommittee 1 will do further research, before making the recommendation to work the issue or reject it.
- **38550 Taxpayers being Turned Away in Error at TAC Office**, Taxpayer turned away in error during visit at TAC office. Subcommittee 1 will gather further data and research
- Subcommittee 1 discussed the Newsletter. Nina Tross will write an article for submission

**Decision: Full Committee Consensus accept Subcommittee 1 report and recommendation to drop issues as stated.**

### **Subcommittee 2**

Paula King stated Subcommittee 2 held their meeting. The following updates were shared on Issues:

- **40782 Provide Google Maps Link For All TAC Offices**, was forwarded to the Joint Committee
- **40311 Suggestion for Getting Transcripts**, working on doing more research
- **40698 Modify VITA Training to Include HSA Issues**, is still under consideration with IRS
- **40699 Expand VITA Scope to Include OIC Issues**, a summary will be provided to include the OIC issue. O'Sullivan received a response from IRS and will forward to the Full Committee for review during next month's meeting
- **41541 List of Tax Preparers** is a list of professional practitioners. Subcommittee 2 will do further research on this issue
- Ying Sa will be completing the article for the Newsletter for this month. Each member will take turns submitting an article.

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

Tross stated the 2020 VITA Project Review information has been sent out for volunteers. O'Sullivan sent an inquiry to IRS for the schedule and the agenda.



Bohler stated no further updates have been provided. She will follow up on where they are.

### **Outreach Report**

Thurston Smith shared the following:

- Thank you to members for turning in their Activity reports for the month
- Outreach Reports are due the 25<sup>th</sup> of each month
- Suggested adding a reminder on Outlook to assist in getting the reports in on time
- Smith is working on reviewing the Toolkit
- Members were encouraged to review the Outreach Toolkit and documents for helpful tips on doing outreach
- Reminder to members to document information and activities done that relates to TAP

### **Internal Communications Committee**

Discussion was held on the Vice Chair participation for Full Committee and Joint Committee meetings. Jimerson will follow up with Robert Moretti and provide guidance. ICC members are not totally responsible for submitting articles for the Newsletter. Any member can submit an article by the 25<sup>th</sup> of each month. This provides enough time for review and posting to be shared by the 5<sup>th</sup> of the month.

### **Action Items**

O'Sullivan stated:

- Update and forward Committee Minutes to Kevin Brown for posting onto [www.ImproveIRS.org](http://www.ImproveIRS.org)
- Update Screening Report and Subcommittee Issues in SAMS
- Provide members with information for follow ups

### **Roundtable**

- There is no limit on the number of words requirement for Newsletter articles. One to two paragraphs were suggested
- Jimerson encouraged members to continue to be safe and healthy. COVID-19 current updates are posted on [www.IRS.gov](http://www.IRS.gov) website.

### **Closing**

Jimerson officially closed the meeting.

**Next Meeting: Tuesday, June 9, 2020,  
1:00 p.m. ET, 12:00 p.m. CT, 11:00 a.m. MT, 2:00 p.m. PT**