



**Taxpayer Assistance Center Improvements Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, October 13, 2020**

Designated Federal Officer

- Susan Jimerson Chief, TAP West

Attendance

- | | | |
|-------------------|-------------------|------------|
| • 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 |

Member Absent

- | | | |
|---------------------|----------------|--------|
| • Patrice Brown | Brooklyn, NY | Member |
| • Licia Haynie | Kaneohe, HI | Member |
| • Anthony Whitmarsh | San Marcos, CA | Member |
| • Jessica Wilson | Byram, MS | Member |

Staff

- | | |
|----------------------|--------------------------|
| • Terrie English | TAP Director |
| • Matthew O'Sullivan | Program Analyst |
| • Rosalind Matherne | Program Analyst |
| • Michael Odom | Wage & Investment |
| • Annie Gold | Administrative Assistant |

Roll Call

Quorum was met.

Welcome and Designated Federal Official (DFO) Report

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

- The Outreach Committee meeting will be held on October 15, 2020 beginning at 12:00 pm, EDT. The Vice Chairs of each project committee and the Internal Communications Committee will attend and is led by TAP Vice Chair Robert Moretti. They will be discussing Outreach activities

- The first draft of the Chair Report for the Annual Report is due to be turned in to Gilbert Martinez on October 16, 2020. Martinez is the Joint Committee Analyst and the Analyst in charge of the 2020 Annual Report
- There will be an informational session explaining what it is like to be a TAP Chair or Vice Chair is scheduled for October 20, 2020 at 3:00 pm, EDT
- Following the format of events for the upcoming TAP Chair and Vice Chair Election process, nomination or Self nominations are due October 25, 2020 by 12:00 am, EDT. Members were encouraged to submit their interest by midnight on October 25, 2020
- Campaign statements are due October 30, 2020 by midnight and will be posted onto www.TAPSpace.org
- There will be a meet the candidates session held on November 5, 2020 at 3:00 pm, EDT and voting ballots will be sent to members by November 6, 2020.
- Votes are due to be turned in on November 13, 2020 by midnight. Results will be shared on November 17, 2020
- There will be a mentorship program at the October 21, 2020 meeting. Calendar invites have been sent to members that have expressed interest
- Joint Committee monthly meeting will be held on October 22, 2020 beginning at 1:30 pm, EDT. TAP Chairs and Vice Chairs, Chairs from each project committee and Internal Communications committee will attend this meeting. Members were encouraged to join in on the call
- Internal Communications Committee (ICC) meeting is scheduled for October 27, 2020 beginning at 3:00 pm, EDT. Work is done on communication items internal and external

IRS has added a QR Code on www.IRS.gov website to assist Taxpayers when looking for options on paying balances owed and Installment Agreements. Currently the QR Code is being used on the CP14 and CP14A Notices.

National Office Report

Terrie English thanked everyone for being on the call. She provided the following information:

- Tax Return Extensions are due to be filed by October 15, 2020.
- The deadline for qualified individuals to file for Economic Stimulus payments must register with IRS by Saturday, November 21, 2020.
- The Commissioner spoke before Congress on October 7, 2020. The National Taxpayer Advocate, Erin Collins was present during the meeting. There was some good information shared on the video. Members were encouraged to go onto the website and review information on the House Oversight and Reform committees.
- An Email with updated information on the Business Toolkit was sent to members on some of the changes and some of the things being rolled out

- Next month information will be shared on the websites being uploaded for the new www.TAPSpace.org and www.ImproveIRS.gov
- There are a lot of things happening and being closed out for the end of the year and get ready for a strong start next year. Preparations for the Face to Face and Virtual is being done and to be prepared for either virtual or face to face meetings. No decisions have been at this point.

Chair Report

Nina Tross welcomed everyone to the call and shared the following:

- Excited on the two Issues that will be going forth to the Joint Committee
- She was pleased with the positive response from the Attorney Advisor
- Tross will submit the next article for the TAP Newsletter

Minutes for Approval

TAC September 8, 2020 Monthly Minutes were approved with the deletion of a sentence fragment within the Screening Report.

Thurston Smith motioned and Sheila Campbell second to approve the September 8, 2020 Minutes.

Member of the Public

None

Program Owner Report

Michael Odom stated the referral for Issue 40782, Google Maps for TAC Locations rebuttal was discussed during their last meeting where Beth Braddock had informed him, they are working hard on the response. They have until November 10, 2020 to provide the rebuttal response. Odom anticipates the response will be sent before the deadline.

Screening Report

Matthew O'Sullivan stated the Screening Committee met September 30, 2020. A copy of the Screening Report was shared with members. They reviewed the inventory and several of the issues were dropped. The issues that needed to be assigned to other project committees were discussed and assigned. There were issues that were placed in the Parking Lot for future reference and due to the lateness in the TAP year, those issues will be looked at a later date.

Sheila Campbell motioned and Thurston Smith second to accept the Screening Report as submitted.

Decision: Full Committee Consensus accept Screening Report as submitted.

Subcommittee Reports

Subcommittee 1

Campbell provided the following

- **Issue 40462 Stand Still with Transcript and Innocent Spouse.**
Subcommittee 1 received the Attorney Advisor's review. They decided to wait for the response from Systemic Advocacy prior to completing their recommendation. O'Sullivan will provide the SA's response. The SA has ten days to complete their response. O'Sullivan will follow up to ensure a timely response to present to the Full Committee

Subcommittee 2

Paula King stated Subcommittee 2 discussed

- **Issue 40782 Improvement to Taxpayer Assistance Center (TAC) Webpage with Addition of Google Maps,** Subcommittee 2 had a discussion with IRS and determined that the issue has been resolved
- **Issue 40310, Requesting a Transcript without making an appointment,** Subcommittee 2 completed writing the referral. Their recommendation is to forward to the Joint Committee for review.
Kathryn Tracy motioned and King second to accept
Decision: Full Committee Consensus to forward Issue 40310 to the Joint Committee.

Outreach Report

Smith reminded members

- The Outreach Reports are due to be turn in by the twenty-fifth of each month
- Members were encouraged to enter all activity related to TAP and continue the good work
- Members were encouraged to visit www.TAPSpace.org to see the support material and resources that is available
- Tross added she reached out to the three Local Taxpayer Advocates (LTA) in her state from Fort Lauderdale, St. Petersburg and Jacksonville. The LTAs are busy and look forward to working with members. Members encouraged to reach out to the LTA in their state

Internal Communications Committee (ICC)

O'Sullivan shared the following

- Progress report was seen on the updates to www.TAPSpace.org
- Jim Buttonow and Gina Gray assisted with the Newsletter
- Members were encouraged to read the Newsletter to find out what other Project Committees are doing
- Thank you to members for their participation and encouraged members to submit their articles

Action Items

O'Sullivan stated he will:

- Post the approved Minutes on www.TAPSpace.org and forward to Kevin Brown to be posted onto www.ImproveIRS.org
- Complete the Screening Report, drop cases that have been dropped, follow up with an Email to the Analysts on issues assigned to other project committees
- Forward a copy of Issue 40310 to Gilbert Martinez to be shared during the Joint Committee's meeting and updated in SAMS

Roundtable

There were no additional comments for the roundtable.

Jimerson expressed gratitude to the Full Committee for their participation and all the work being done. She will share the dates for the TAP Chair Elections.

Closing

Jimerson officially closed the meeting.

**Next Meeting: Tuesday, November 10, 2020,
1:00 PM EDT, 12:00 PM CDT, 11:00 AM MDT, 10:00 PM PDT**

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