



**Taxpayer Assistance Center Improvements Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Tuesday, September 8, 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
- Jessica Wilson Byram, MS Member

**Members Absent**

- Patrice Brown Brooklyn, NY Member
- Licia Haynie Kaneohe, HI Member
- Anthony Whitmarsh San Marcos, CA Member

**Staff**

- Matthew O'Sullivan Program Analyst
- Rosalind Matherne Program Analyst
- Michael Odom Wage & Investment
- Leslie Henry IRS
- Annie Gold Administrative Assistant

**Roll Call**

Quorum was met.

**Welcome**

Susan Jimerson opened the meeting and welcomed everyone to the call. TAP Director, Terrie English could not attend the meeting today. Jimerson shared the National Office Report. She provided an overview of the Agenda and shared the following scheduled meetings:

- The Outreach Committee meeting will be held on September 17, 2020 beginning at 12:00 pm, EDT. The Vice Chairs of each project committee will attend and is led by TAP Vice Chair Robert Moretti.



- Internal Communications Committee (ICC) meeting is scheduled for September 22, 2020 beginning at 3:00 pm, EDT. Discussions will be held on various communications items such as the Newsletter, Facebook and other media items.
- Joint Committee monthly meeting will be held on September 24, 2020 beginning at 1:30 pm, EDT. Phillip Kleiber is the lead for this committee. Referrals that have been submitted for review and approval will be discussed along with other topics submitted to the Joint Committee

### **Chair Report**

Nina Tross welcomed everyone to the call.

- There are ongoing discussions on arranging a virtual meeting to see all members face to face. The date and time will be determined.
- Thurston Smith is working with Tross on the Annual Report. The date and time for the Annual Report meeting is being worked on.
- Jessica Wilson will provide the Newsletter article for October. Smith is available to assist if needed.

### **Minutes for Approval**

Taxpayer Assistance Center Improvements Committee (TAC) August 11, 2020 Monthly Minutes were approved as submitted.

Thurston Smith motioned, and Sheila Campbell seconded.

### **Member of the Public**

None

### **Program Owner Report**

Michael Odom stated there were no updates for this call.

### **Screening Report**

Matthew O'Sullivan stated due to his computer issues there is no Screening Committee Report available at this time. He will add the incoming issues and update the report for the Screening Committee meeting. The full report will be ready for next month's meeting.

## **Subcommittee Reports**

### Subcommittee 1

Campbell provided the following updates on Issues:

- **40462 Stand Still with Transcript and Innocent Spouse.**  
Subcommittee 1 completed and reviewed the drafted issue. They are still compiling the information. O’Sullivan will provide each member of Subcommittee 1 with the combined information gathered relative to this issue, prior to their next meeting.
- **40168, Verification of 5071C Letter.** O’Sullivan mentioned additional research was completed using [www.IRS.gov](http://www.IRS.gov) website. Information will be shared with Subcommittee 1 members.

### Subcommittee 2

Paula King stated Subcommittee 2 finished their rebuttal of the following two issues and presented them before the Full Committee for their discussion and vote of approval to move forward:

- **Issue 40782 Improvement to Taxpayer Assistance Center (TAC) Webpage with Addition of Google Maps**  
**Motioned by Smith and second by Kathryn Tracy**

**Decision: Full Committee Consensus forward Issue 40782 rebuttal back to IRS.**

- **Issue 40310, Requesting a Transcript without making an appointment**  
**Decision: Full Committee Consensus remove reference to TAS and forward Issue 40310 to Systemic Advocacy and the Attorney Advisor for their comments. It will proceed to the Joint Committee.**

## **Outreach Report**

Smith stated the Outreach Committee has been involved in a variety of processes updating information, forms and templates.

- Members were encouraged to visit [www.TAPSpace.org](http://www.TAPSpace.org) to see the wealth of information and resources that is available to assist with TAP projects
- The 2020 Outreach plan, Newsletters, Toolkit, internet links to assist with Outreach and the Outreach planning tool have all been updated.
- A reminder to members to get the Activity Reports in. They are due by the twenty-fifth of each month.

### **Internal Communications Committee (ICC)**

Tross stated the On TAP Newsletter has been posted.

- Tross will submit the news article for next month. Members were asked to share any articles for the newsletter with Tross and send a copy to O’Sullivan.
- O’Sullivan will share all the consolidated information he has to possibly include in the article.
- Members were encouraged to read the Newsletter to find out what other Project Committees are doing.
- Thank you to members for their participation.

### **Action Items**

O’Sullivan stated:

- Share an updated Screening Report with the Screening Committee members.
- Share additional information for Issue 40310 with Subcommittee 2
- Forward Subcommittee 2 rebuttal for Issue 40782 to IRS.
- Share research results for Issue 40168 with Subcommittee 1 members.
- Consolidate information for Issues 40462.
- Inform Full Committee of responses received from Systemic Advocacy and Attorney Advisor.
- Remove the reference to TAS on Issue 40310.
- Forward the approved Minutes for posting onto [www.TAPSpace.org](http://www.TAPSpace.org)

### **Roundtable**

There were no additional comments for the roundtable.

### **Closing**

Jimerson officially closed the meeting.

**Next Meeting: Tuesday, October 13, 2020  
1:00 PM EDT, 12:00 PM CDT, 11:00 AM MDT, 2:00 PM PDT**

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