



**Taxpayer Assistance Center Improvements Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Tuesday, November 10, 2020**

**Designated Federal Officer**

- Susan Jimerson                      Chief, TAP West

**Attendance**

- |                   |                   |            |
|-------------------|-------------------|------------|
| • Patrice Brown   | Brooklyn, NY      | Member     |
| • 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     |
| • Jessica Wilson  | Byram, MS         | Member     |

**Member Absent**

- |                     |                  |        |
|---------------------|------------------|--------|
| • Licia Haynie      | Kaneohe, HI      | Member |
| • Nina Tross        | Apollo Beach, FL | Chair  |
| • Anthony Whitmarsh | San Marcos, CA   | Member |

**Visiting Member**

- |                |             |
|----------------|-------------|
| • Phil Kleiber | TAP Chair   |
| • Bob Moretti  | TAP V-Chair |

**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. Nina Tross could not be on the call. Thurston Smith agreed to act as Chair for the meeting. Members were congratulated on attending the last meeting for this TAP year. There were six new members to join TAP during this TAP year and three members (Sheila Campbell, Thurston Smith and Kathryn Tracy) will be retiring from the TAP. Congratulations were extended to them all for their hard work and

commitment to TAP. Members will be sent a TAP Survey to complete as the year closes out. They were encouraged to take the survey and share any helpful ideas they may have for TAP going forward. An overview of the Agenda and the following scheduled meetings was shared:

- There will be a Meet the Candidates Session on November 10, 2020 beginning at 3:00 pm, EDT. Candidates for the Chair and Vice Chair position will be able to share why they would be the best person for that position
- Mentorship meeting improving programs on Friday, November 13, 2020 beginning at 12:00 pm, EDT
- The Screening Committee next meeting will be held on November 17, 2020, at 1:00 pm, EDT
- Internal Communications Committee will meet on November 17, 2020 at 3:00 pm, EDT. They will go over the Newsletter for December
- The Outreach Committee last meeting for the year will be held on November 19, 2020 beginning at 12:00 pm, EDT
- The Joint Committee will have their last meeting for the year on November 19, 2020 beginning at 1:30 pm, EDT. Members were encouraged to attend the meeting if possible
- TAP Member Graduation Ceremony will be held on November 20, 2020 beginning at 11:00 am, EDT. Three members from TAC will be graduating: Sheila Campbell, Thurston Smith and Kathryn Tracy

### **National Office Report**

Terrie English expressed her appreciation to all members for their dedication and hard work all year and for being on the call. Members were assured their work is being recognized. To the returning members, she shared her excitement to continual work with them. To the retiring members: Thurston Smith, Sheila Campbell and Kathryn Tracy, she expressed recognition of their dedicated commitment and all of the work they have done.

Phil Kleiber expressed gratitude to everyone and to the retiring members. He stated how the year has been a great one working with all the members.

### **Chair Report**

Thurston Smith thanked the Staff for all their help. On behalf of Nina Tross, he thanked the members for their continual support and commitment and quality of work being done. Members were encouraged to commit to making the last Outreach commitments for the year.

### **Minutes for Approval**

TAC October 13, 2020 Monthly Minutes were approved as submitted.

**Sheila Campbell motioned and Kathryn Tracy second to approve the October 13, 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. The other issue is for the Online TAC Appointment will be handled by W&I. He anticipates IRS response to be in by early December if not the issues would be carried over to next year.

### **Screening Report**

Patrice Brown stated most of the issues that were listed on the Screening Report were dropped due to COVID, refund or individual issues. There were a couple issues referred to other project committees and some were placed in the Parking Lot for further review.

Members were encouraged to consider to be a part of the Screening Committee.

**Tracy motioned and Campbell second to accept the Screening Report as submitted.**

**Decision: Full Committee Consensus accept then Screening Report as submitted.**

### **Subcommittee Reports**

Subcommittee 1

Campbell expressed her thank you to O'Sullivan and Jimerson for the opportunity to be a part of the committee and provided the following:

- **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 informed the committee of the response was received from SA and that a confirmation letter be sent to the Taxpayer. Discussions were held on the procedure when requesting a transcript. IRS response is Taxpayers received a letter for the process of requesting a transcript. The recommendation of Subcommittee 1 is to

**Paula King motioned and Brown second to accept**

**Decision: Full Committee Consensus to accept the response from IRS**

Subcommittee 2

King stated Subcommittee 2 discussed

- **Issue 40782 Improvement to Taxpayer Assistance Center (TAC)**

**Webpage with Addition of Google Maps**, Tracy added the changes have been made to the website and it is a win for TAP and Taxpayers.

Their recommendation is to accept IRS response and close Issue 40782

**Tracy motioned and Jessica Wilson second**

**Decision: Full Committee Consensus to accept IRS response and close Issue 40782**

**Outreach Report**

Smith informed members this will be his final mentioning of Outreach and shared the following reminders:

- The Outreach Reports are due to be turn in by the twenty-fifth of each month
- Members were encouraged to capture all activity relative to TAP. This includes what will be done after this meeting; phone calls and emails count. All information is important
- Thank you to all for their work

**Internal Communications Committee (ICC)**

O'Sullivan shared the following

- ICC had their meeting early for the month of November
- November Newsletter has been posted
- An article for the December Newsletter has been submitted for TAC

**Action Items**

O'Sullivan stated he will:

- Post the approved Minutes on [www.TAPSpace.org](http://www.TAPSpace.org) and forward to Kevin Brown to be posted onto [www.ImproveIRS.gov](http://www.ImproveIRS.gov)
- Complete the Screening Report, drop cases that have been dropped, follow up with a 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
- Close Issue 40782 out of the system as accepted after rebuttal

**Roundtable**

- Bob Moretti informed the committee, starting in December 01, 2020 members are to use the second tab at the bottom of the spreadsheet to report their time. November 21, 2020 is the deadline for the homeless to receive Stimulus.
- English thanked the committee for a job well done. Jimerson expressed gratitude to the Full Committee for their participation and appreciation for their work.

**Closing**

Jimerson officially closed the meeting.

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



**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](http://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](http://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](http://www.TAPSpace.org) and [www.ImproveIRS.gov](http://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](http://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](http://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](http://www.TAPSpace.org) and forward to Kevin Brown to be posted onto [www.ImproveIRS.org](http://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.**



**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.**



**Taxpayer Assistance Center (TAC) Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
August 11, 2020**

**Designated Federal Officer**

- Susan Jimerson                      Chief, TAP West

**Members Present**

- |                     |                   |            |
|---------------------|-------------------|------------|
| • Patrice Brown     | Brooklyn, NY      | Member     |
| • Sheila Campbell   | Washington, DC    | Member     |
| • Edward Donovan    | Holly Springs, NC | Member     |
| • Paula King        | Lexington, KY     | Member     |
| • Thurston Smith    | Memphis, TN       | Vice Chair |
| • Kathryn Tracy     | Buckeye, AZ       | Member     |
| • Anthony Whitmarsh | San Marcos, CA    | Member     |
| • Jessica Wilson    | Byram, MS         | Member     |

**Members Absent**

- |                |                  |        |
|----------------|------------------|--------|
| • Licia Haynie | Kaneohe, HI      | Member |
| • Ying Sa      | Des Moines, IA   | Member |
| • Nina Tross   | Apollo Beach, FL | Chair  |

**Staff**

- |                      |                          |
|----------------------|--------------------------|
| • Terrie English     | TAP Director             |
| • Matthew O'Sullivan | Program Analyst          |
| • Rosalind Matherne  | Program Analyst          |
| • Antonia Keeling    | Program Analyst          |
| • Debby Awalt        | 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. Terrie English could not attend this call. She provided an overview of the Agenda and shared the following scheduled meetings:

- Quarterly Virtual TAP meeting will be held on August 17, 2020 beginning at 1:00 p.m. ET. There will be virtual training and information shared on the current events happening within the TAP program.
- The TAC Screening Committee will have their meeting on August 18, 2020
- The Outreach Committee meeting will be held on August 20, 2020 beginning at 12:00 p.m. ET

- The Annual Planning Session for the Joint Committee will be on August 24, 2020. The Chairs of the Project Committees will all attend the session. They will review how the year has gone, the different projects for the upcoming year, discuss the presentative for the Chair and different items involving TAP. There will be two days of two-hour sessions on each day. The first session will be held on August 25, 2020 and the other one on August 26, 2020. They both will begin at 1:30 p.m. ET
- Joint Committee monthly meeting will be held on August 27, 2020 beginning at 1:30 p.m. ET. A report out from the various committees will be shared during the meeting along with any referrals for elevation to the IRS.
- A solicitation was sent out to each member asking for volunteers to participate on the 2020 Annual Report Committee. Members who did not receive the email were encouraged to let Gilbert Martinez the Joint Committee Analyst know. He will be facilitating the meetings and make sure the report is completed timely
- Internal Communications Committee (ICC) meeting is scheduled for August 25, 2020. They will work to reschedule the meeting due to a conflict with another meeting.
- TAP Interviews have all been completed. The package is being put together and background checks completed. It will be routed to through the approval process.

### **Chair Report**

Thurston Smith welcomed everyone to the call. Matthew O'Sullivan provided updates on the following:

- On Subcommittee 1 they are working on **Issue 40462, Standstill with Transcripts and Innocent Spouse** and **Issue 40168, Verification Letter 5071C**
- Subcommittee 2 received a response back from IRS stating they will not be implementing the recommendation on **Issue 40782, Improvement to Taxpayer Assistance Center (TAC) Webpage with Addition of Google Maps**

### **Minutes for Approval**

The following TAC Monthly Minutes were approved as submitted

- June 9, 2020
- July 14, 2020

### **Member of the Public**

None

### **Program Owner Report**

Michael Odom stated he has replaced Tamikio Bohler, who has moved to a different position. He looks forward to working with the Committee.

### **Screening Report**

Patrice Brown stated the Screening Report reviewed out of one hundred Issues; Four were placed in the Parking Lot for further review, four were referred to other committees and the remaining were dropped.

**Decision: Full Committee Consensus to accept the Screening Report as submitted.**

### **Subcommittee Reports**

#### **Subcommittee 1**

Sheila Campbell stated Subcommittee 1 has two issues on the Project Referral Form for the two issues. O'Sullivan shared the following

- **40462 Standstill with Transcript and Innocent Spouse.** Continuing research is being done on this issue. The Subcommittee found that when innocent spouse is entered on the [www.irs.gov](http://www.irs.gov) website search field it is directed to injured spouse issues on the same page.
- **40168 Verification of 5071C Letter.** Different members of the Subcommittee will do a review of the letter and the information and begin to structure the referral on this issue. O'Sullivan asked members of Subcommittee 1 if they have made any progress on this task
- O'Sullivan will do additional research and provide findings to the Subcommittee.

#### **Subcommittee 2**

Paula King provided the following report for Subcommittee 2:

- **Issue 40782 Improvement to Taxpayer Assistance Center (TAC) Webpage with Addition of Google Maps.** IRS issued their response and the Subcommittee is preparing a rebuttal. O'Sullivan has provided the necessary form to complete.
- **Issue 40310 Suggestion for Getting Transcripts.** There is a problem with validating the ID with the initial transcript. Sub-Committee 2 is revisiting the draft referral to include the information regarding the identity required for validating to get the transcript.
- Kathryn Tracy stated she wrote the rebuttal on **Issue 40782 Suggestion for Getting Transcripts** and forwarded it to O'Sullivan. He will forward a copy to the members of the committee. On **Issue 40310 Suggestion for Getting Transcripts**, she revised the draft referral to change the number of recommendations from one to two and added the second portion of the issue and forwarded it to O'Sullivan.
- O'Sullivan will do additional research on the rebuttal process and share with members. Anticipate finalizing during next month's meeting

### **VITA Project Review**

Tracy shared the following:

The **Form 6744 Understanding Taxes Program** is the product that is the test certifying all VITA volunteers. A completed revised 2020 test was put together for all VITA volunteers. It is available on Link and Learn. The opportunity extended to TAP member was greatly appreciated to work on the project.



### **Outreach Report**

Smith provided the following updates:

- A reminder to members to get the Activity Reports in. They are due by the 25<sup>th</sup> of each month
- Encouragement was given to always capture all activities relating to TAP including telephone calls, speaking with family members or emails.
- The emails Smith sends out regarding Outreach are effort to be helpful in reporting any Outreach activities. Any feedback would be appreciated.

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

Smith stated the next ICC meeting date conflicts with another meeting and the meeting time was going to be changed.

O'Sullivan added

- He contacted the members of ICC and their decision was to postpone the meeting for one hour
- Emails was sent to each member for concurrence
- The change is a one-time occurrence
- Antonia Keeling has been very instrumental in getting the Newsletter out
- Discussions were held during the last ICC meeting, Concerning the restructuring of TAPSpace. The ICC determined to not take any actions on changing any status on Facebook until after TAPspace has been restructured. Once the restructuring has been completed, some of the issues on Facebook may be resolved
- Smith volunteered to write the article for September Newsletter submission

### **Action Items**

O'Sullivan stated:

- Make sure information is shared with the subcommittees on the referrals they are writing
- Forward the approved Minutes for posting onto [www.TAPSpace.org](http://www.TAPSpace.org)
- Update SAMS with the information from the Screening Report

Appreciation shared with members in attendance on today's call. Reminder to all, there are three Full Committee meetings remaining before the end of the TAP year

### **Roundtable**

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

Congratulations extended to Tamikio Bohler on her promotion.

### **Closing**

Jimerson officially closed the meeting.



**Next Meeting: Wednesday, September 8, 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.**



**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<br>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](http://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 is 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](http://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](http://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.**



**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 25<sup>th</sup> 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 25<sup>th</sup> of each month.

### **Action Items**

O'Sullivan stated:

- Forward approved Minutes will be posted to [www.TAPSpace.org](http://www.TAPSpace.org) and sent to Kevin Brown for posting onto [www.ImproveIRS.org](http://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.**



**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    | Kaneohi, 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**



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

**Designated Federal Officer**

- Susan Jimerson                      Chief, TAP West

**Members Present**

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

**Members Absent**

- |                |             |        |
|----------------|-------------|--------|
| • Licia Haynie | Kaneohe, HI | Member |
|----------------|-------------|--------|

**Visiting Member**

- |                  |                 |                |
|------------------|-----------------|----------------|
| • Robert Moretti | Great Falls, MT | TAP Vice Chair |
|------------------|-----------------|----------------|

**Staff**

- |                      |                          |
|----------------------|--------------------------|
| • Terrie English     | TAP Director             |
| • Matthew O'Sullivan | Program Analyst          |
| • Debra Awalt        | Wage and Investment      |
| • Tamikio Bohler     | Wage and 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.

- Outreach Committee will meet on April 9, 2020 beginning at 1:00 p.m. ET. The Lead for this committee is the TAP Vice Chair and is attended by all the Vice Chairs of the Project Committees
- Joint Committee scheduled meeting is on April 23, 2020 beginning at 1:30 p.m. ET. The call information has been posted on [www.TAPSpace.org](http://www.TAPSpace.org) The TAP Chair, Project Committee Chairs will be attending. Members were encouraged to attend





- The Internal Communications Committee is scheduled for April 28, 2020 beginning at 3:30 p.m. ET. More information will be shared with the date and time

### **National Office Report**

Terrie English welcomed everyone on the call and stated:

- The New National Taxpayer Advocate, Erin Collins shared a message during one of her meeting that is to be shared with Taxpayers to refer to [www.irs.gov](http://www.irs.gov) for any information needed on the Stimulus payments and Coronavirus. Information is being updated hourly. TAP is instructed to direct all calls to TAS who will share the questions with IRS.
- Recruitment has been extended to April 20, 2020. This is a short window before the Recruitment period closes. Lisa Billups is available for questions members may have on how their state is doing.

### **Comments from the Public**

None

### **Chair Report**

Nina Tross added the website is being updated daily on multiple IRS feeds. There have been a good number of applicants received for the year.

### **Minutes for Approval**

Tross stated March 2020 minutes will be approved during the full committee meeting in May. She also shared the process for approving the minutes.

There is a video available on [www.irs.gov](http://www.irs.gov) on the qualifications of applicants for TAP membership. Robert Moretti added background investigations would be done and they are looking for a diverse team.

### **Member of the Public**

None

### **Program Owner Report**

Tamikio Bohler stated there are several areas listed in the newsroom to obtain information on the Coronavirus, stimulus payment and tax extended deadline. The Headquarters Analysts and SME are available to answer data requests. All questions should be submitted two weeks in advance. Do not contact the SME directly. Matthew O'Sullivan will reach out to the SME on members behalf. Mike Odom will be participating on the full committee calls. Bohler will send a list of contact names and information to O'Sullivan. Debra Awalt added during Outreach activities, members were encouraged to promote the filing season extension and direct deposit information should be added correctly. There are options for FreeFile information listed on [www.irs.gov](http://www.irs.gov)

### **Subcommittee Reports**

Subcommittee 1



- Sheila Campbell asked about the protocol for submitting a recommendation. O'Sullivan shared information for Issue 40513 Methods to Assist Taxpayers Who Visit a TAC Without an Appointment. The response received explained IRS is not accepting the recommendation. Subcommittee 1 will review and discuss their next move on this issue. They will bring the issue before for Full Committee for discussion in May
- O'Sullivan added information was received on Issue 40708 IRS Appointment but there was no contact information for the submitter to follow up for clarification on what was needed. Subcommittee 1 proposed closure of the issue

#### Subcommittee 2

Kathryn Tracy stated Issue 40782 Provide Google Maps Link for All TAC Offices was worked on by the committee in 2019. They completed the recommendation to include on the link a map for Taxpayers to locate the nearest TAC office. Linking the map was difficult. Screenshots were added to help IRS understand what they mean. They are requesting the full committee's approval to move forward to the Joint Committee.

**Decision: Full Committee consensus move Issue 40782 forward to Joint Committee for approval.**

O'Sullivan added he will send the issue on to be added on the Joint Committee's Agenda. He will also close Issues 40513 and 40708.

#### **Outreach Report**

Thurston Smith shared the following:

- The Outreach Reports are due to be in by the 25<sup>th</sup> of each month
- Copies are to be submitted to O'Sullivan, Smith and send a copy to TAPAdvocacypanel.gov mailbox
- Any activity done on behalf of TAP including conference calls, general conversations, monthly calls, preparations should be noted on the report
- Members were encouraged to submit ideas for the Newsletter to O'Sullivan and copy Smith. This is a great opportunity to get the word out.

O'Sullivan added

TAP's assistance is needed to review and update SPEC's training products previously approved. SPEC is asking TAP to solicit 1-2 members to serve on each of the teams below with the following competencies:

- Knowledge of federal tax laws for individuals
- Ability to interpret and write technical content for students
- Ability to work independently and with teams
- Self-motivated/self-starter
- Ability to meet deadlines

Meetings will be conducted virtually from 8:00am – 4:30. Tentative meeting dates are listed below for the teams.

**Pub 4012, VITA/TCE Resource Guide** – Used at the sites and conveys tax law in the form of interview tips, narratives, flow charts, diagrams, charts and graphs within the scope of the VITA/TCE programs.



5/19 - 5/21/2020

7/7 - 7/10/2020

**Pub 4491, VITA/TCE Training Guide-** Used by instructor and student participants in VITA/TCE to learn the tax laws necessary to prepare complete and accurate returns.

5/5 - 5/7/2020

6/16 - 6/18/2020

**Form 6744, VITA/TCE Volunteer Assistor's Test/Retest** - the certification product for volunteers wishing to assist taxpayers with basic, intermediate, advanced, military and international tax law issues within the scope of VITA/TCE programs. (Kathryn Tracy participated on this team last year. If she is still a member and available, we would love to have her participate again this year.)

5/12 - 5/14/2020

6/9 - 6/11/2020

7/21 - 7/23/2020

**Understanding Taxes (UT)** - an interactive tax education program for middle school, high school and community college classrooms. For Educators, every UT lesson includes the correlations to national and state educational standards. In addition to the criteria above, ***individuals with an educational background*** would be a great asset to this team. Meeting dates – TBD.

### **Action Items**

O'Sullivan stated:

- Internal Communications Committee will meet week after next. The roster,
- Agenda and Web Ex invitation will be shared with members
- He will elevate Issue 40782 to Gilbert Martinez to be added on the Joint Committee's Agenda for this month
- The Screening committee will have their meeting during next week. Notification will be sent out later today

### **Closing**

Jimerson officially closed the meeting.

**Next Meeting: Wednesday, May 12, 2020,  
1:00 p.m. ET, 12:00 p.m. CT, 11:00 a.m. MT, 2:00 p.m. PT**

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



**Taxpayer Assistance Center (TAC) Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
March 23, 2020**

**Designated Federal Officer**

- Susan Jimerson                      Chief, TAP West

**Members Present**

- |                  |                  |        |
|------------------|------------------|--------|
| • Patrice Brown  | Brooklyn, NY     | Member |
| • Edward Donovan | Cary, NC         | Member |
| • Paula King     | Lexington, KY    | Member |
| • Ying Sa        | Des Moines, IA   | Member |
| • Thurston Smith | Arlington, TN    | Member |
| • Kathryn Tracy  | Buckeye, AZ      | Member |
| • Nina Tross     | Apollo Beach, FL | Member |
| • Jessica Wilson | Byram, MS        | Member |

**Members Absent**

- |                     |                |        |
|---------------------|----------------|--------|
| • Sheila Campbell   | Washington, DC | Member |
| • Licia Haynie      | Kaneohe, HI    | Member |
| • Anthony Whitmarsh | San Marcos, CA | Member |

**TAP Staff Present**

- Matthew O'Sullivan, Program Analyst
- Kudiratu Usman, Program Analyst
- Annie Gold, TAP Administrative Assistant

**IRS Staff Present**

- Tamikio Bohler, Wage & Investment (W&I)
- Debra Awalt, Wage & Investment

**Opening/Welcome – Susan Jimerson**

Susan Jimerson opened the meeting, reviewed the agenda and provided an overview of the TAP mission.



### **Roll Call**

Matthew O'Sullivan conducted the Roll Call. Quorum was met.

### **Self Introductions**

Matthew O'Sullivan asked the Committee Members, TAP Staff and IRS Staff to introduce themselves.

### **Members of Public**

Susan Jimerson asked if there were any members of the public on the call. There were none. No Public Comment.

### **TAP Meeting Procedures**

Matthew O'Sullivan reviewed the TAP Meeting Procedures and Ground Rules by explaining

- Ground Rules
- Telephone & E-Mail Etiquette
- Minutes/Minutes Approval
- Establish Quorum & Consensus
- Agenda & Pre-Read Information
- Activity Reports/Time Reporting
- Methods of Communication

Matthew emphasized that the call-in number listed on Web Ex is not the correct number to use for the audio portion of the call. He advised the members that they should use the phone number and access code on the calendar invite, which will always remain the same throughout the year.

Susan reminded the members to "copy" TAP Staff and the TAP Mailbox ([www.taxpayeradvocacypanel@irs.gov](mailto:www.taxpayeradvocacypanel@irs.gov)) on TAP related e-mails in accordance with the Federal Advisory Committee Act (FACA) guidelines. She also reminded the members to call TAP Staff if they needed to discuss any issues or if they were unable to attend meetings. Susan also advised the members not to go directly to IRS Staff with questions and emphasized that committee members should only go to Matthew and the other TAP Staff members with their questions and/or concerns.

### **So, You Want to Be A Chair?**

Matthew O'Sullivan conducted a presentation on Chair and Vice Chair roles and responsibilities. A nomination process followed for Chair and Vice Chair positions. Kathryn Tracy nominated Thurston Smith and Ying Sa nominated Nina Tross for committee Chair. They accepted the nomination. Nina Tross was elected TAC Committee Chair.



Kathryn nominated Thurston Smith for committee Vice Chair which he accepted. Thurston Smith was elected TAC Committee Vice Chair. Susan offered thanks to the nominees for their participation in the election process and congratulations to Nina and Thurston for their selection as Chair and Vice Chair. Susan asked Nina and Thurston to stay on the call after the meeting ended to prepare for Tuesday's meeting.

### **End of Day/Announcements**

Susan Jimerson thanked everyone for joining today's call and tomorrow's call will begin at the same time with the same call in number. Susan Jimerson and Nina Tross closed the meeting.



**Taxpayer Assistance Center (TAC) Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
March 24, 2020**

**Designated Federal Officer**

- Susan Jimerson                      Designated Federal Officer (DFO)

**Members Present**

- |                     |                  |            |
|---------------------|------------------|------------|
| • Patrice Brown     | Brooklyn, NY     | Member     |
| • Sheila Campbell   | Washington, DC   | Member     |
| • Edward Donovan    | Cary, NC         | Member     |
| • Licia Haynie      | Kaneohe, HI      | Member     |
| • Paula King        | Lexington, KY    | Member     |
| • Ying Sa           | Des Moines, IA   | Member     |
| • Thurston Smith    | Arlington, 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**

- None

**TAP Staff Present**

- Susan Jimerson, Chief TAP West
- Rosalind Matherne, TAP Analyst
- Matthew O'Sullivan, TAP Analyst
- Annie Gold, TAP Management Assistant

**IRS Staff Present:**

- Tamikio Bohler IRS Wage & Investment (W&I)



### **Welcome/Announcements/Review Agenda**

Susan Jimerson and Nina Tross opened the meeting and reviewed the agenda and TAP Mission.

### **Roll Call**

Matthew O'Sullivan took the Roll Call, quorum was met.

### **Comments from the public**

Nina Tross asked for public comment. There were no members of the public on the call.

### **Approval of November Minutes**

Nina Tross reviewed the November Meeting Minutes. Minor corrections were made to the minutes and Thurston Smith moved to approve the Minutes which were seconded by Kathryn Tracy. The November Minutes were approved by the Committee as edited.

Matthew stated he received a question from Ed Donovan after yesterday's meeting regarding the format to be used for e-mail subject lines. Matthew stated that the subject line should include the year, followed by a colon, then the committee name followed by a colon, then the subject. He mentioned again that the Taxpayer Advocacy Panel should be copied on all email.

### **Establishment of Sub Committees and Meeting Dates:**

Matthew O'Sullivan and Nina Tross led a discussion to set the Full Committee and Sub-Committee meeting dates and Sub-Committee Membership.

The Full Committee will meet on the second Tuesday of each month from 1:00 pm to 2:00 p.m. ET.

Sub-Committee 1 will meet on the first Tuesday of each month from 12:00 pm to 1:00 p.m. ET on the first Tuesday of each month. The Sub-Committee Lead will be determined at their first meeting. The following members are in Sub-Committee 1:

- Sheila Campbell
- Patrice Brown
- Edward Donovan
- Nina Tross
- Thurston Smith
- Anthony Whitmarsh

Sub-Committee 2 will meet on the first Tuesday of each month from 1:00 pm to 2:00 p.m. ET on the first Tuesday of each month. The Sub-Committee Lead will be determined at their first meeting. The following members are in Sub-Committee 2:

- Kathryn Tracy
- Paula King



- Ying Sa
- Jessica Wilson
- Licia Haynie

The Screening Committee will meet on the third Tuesday of each month from 1:00 pm to 2:00 p.m. ET. This Committee will meet on an as needed basis. If there are no new issues to screen the meeting will be cancelled. The Lead will be determined at the first meeting. The following members are in the Screening Committee:

- Sheila Campbell
- Patrice Brown
- Kathryn Tracy
- Jessica Wilson

The Quality Review Committee will meet on an as needed basis, when new referrals need to be reviewed. The following members are in the Quality Review Committee:

- Ed Donovan
- Paula King
- Thurston Smith

Internal Communications Committee. The following members will also serve on the Internal Communications Committee:

- Nina Tross
- Anthony Whitmarsh

The dates and times of the Internal Communications Committee meetings have yet to be determined.

As TAC Committee Chair, Nina Tross will also serve on the TAP Joint Committee. The Joint Committee meeting dates and times have yet to be determined.

As TAC Committee Vice-Chair, Thurston Smith will also serve on the TAP Outreach Committee. The Outreach Committee meeting dates and times have yet to be determined.

#### **Review of IRS Responses:**

Matthew O'Sullivan and Nina Tross led the review of responses received from IRS:





- **Issue 40698 Modify VITA Training to Include HSA Issues IRS Response ID 1632.** The IRS has indicated that they are considering the TAP recommendation and will provide a response by December 30, 2020. There is no further action for the Committee to take at this time. Matthew O'Sullivan will continue to monitor this issue and provide the IRS response when received.
- **Issue 40513 Implement Modified Appointment System IRS Response ID 1739.** The IRS determined not to adopt the TAP recommendation. Susan Jimerson the referral process and rebuttals to IRS responses. The Committee determined that Issue 40513 needs further review by Subcommittee 1.

Matthew O'Sullivan then shared and reviewed the Screening Report with the Committee and stated that he will send out the Report reflecting the issues each subcommittee is working on. The Screening Committee is scheduled to meet on April 19, 2020 at 1:00 pm EDT. At this meeting it will be determined which issues the Committee will work on immediately; the issues which maybe dropped and the issues which will be placed in the Parking Lot.

#### **2020 Project Committee Work from W&I:**

- **Training.** Training and certification are vital components of the IRS's free volunteer tax preparation programs. SPEC provides both paper and electronic products to assist volunteer tax preparers in providing high quality services and in preparing accurate tax returns.

Tamikio Bohler and Mathew O'Sullivan reviewed the Project Request received from W & I.

Kathryn Tracy discussed Issue 41541 – List of Tax Preparers. It was decided that Subcommittee 2 will continue to work on it.

Thurston Smith reminded everyone that the Activity Reports are due tomorrow, March 25, 2020. Everyone should send it to him and copy Matthew as well as the Taxpayer Advocacy Panel mailbox.

Nina Tross and Susan Jimerson discussed the TAP Meeting Assessment and reminded everyone of their homework assignments. Susan suggested everyone continue to explore TAPspace and Improveirs.gov and then closed the meeting.

The next TAC Full Committee Meeting will be held on April 14, 2020 from 1:00 pm to 2:00 p.m. ET.

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