



Members of the Public

N/A

Opening/Welcome/Announcements

Terrie English welcomed everyone to the meeting. This is the first official meeting for Taxpayer Assistance Center (TAC) committee in this TAP year 2019. Went over Agenda. Introductions of staff and members followed the announcements.

Terrie English covered the TAP Mission – PowerPoint presentation.



TAP Member Procedures – Matt O’Sullivan

Ground rules; members to be respectful, make specific suggestions; share information; all member participation; attack problems not people; okay to disagree; build a solid team; no sidebar conversations; one person at a time; put phone on mute when not talking; reach an agreement; Consensus; Meeting Minutes and Minutes approval process; establish Meeting Quorum; telephone and email etiquette; timeframes should be in the subject line; review and be prepared for meetings by referring to TAPSpace for required pre-reads; turn in Activities Reports on time; a lot of communicating by email and some by phone; tools: WebEx & TAPSpace; on calls please state your name when talking; please notate when emails need urgent attention in subject line and/or call us; attending calls is very important – notify us when you cannot attend a call and/or meeting;

Chair Presentation

Terrie English and Matt O’Sullivan presented information about the chair and vice-chair election process for the TAC committee as well as subcommittee leads. Chair elections followed the presentation. Kathryn Tracy was elected as Chair and Andrea Price was elected as Vice Chair. Kathryn Tracy then took over the meeting as the Chair.

Minutes Approval

The minutes from the 11/20/18 Committee meeting were reviewed. The minutes were accepted as written.

No Public Comments

No representative from public present today.

Meeting Dates and Times

Described Quorum (5 min) and Consensus (majority rules)

Full Committee Schedule – 2nd Thursday of each month at 3:00 - 4:00 p.m. ET

Subcommittee 1 Schedule – 1st Thursday of each month 11:00 a.m. – 12:00 p.m. ET

Subcommittee 1 Members:

Emmanuel Smith (Lead)

Rick Herman

Harold Manasa

Andrea Price

Jim Sowell



Subcommittee 2 Schedule – 1st Thursday of each month 3:00 p.m.- 4:00 p.m. ET

Subcommittee 2 Members:

Patrick Townsend (Lead)
Tasheka Dorsey
Kathryn Tracy
Anthony Whitmarsh

Activity Reports due the 25th of each month

Screening Committee Schedule – Meet as needed

New Issue Screening Team

Rick Herman, Kathryn Tracy and Tasheka Dorsey

Quality Committee Schedule – Meet as needed

Quality Review Team

Jim Sowell, Patrick Townsend and Tasheka Dorsey

Outreach Committee – Andrea Price (TAC Vice Chair)

Schedule: To be determined

Internal Communication Committee

Anthony Whitmarsh

Internal Communications Committee Schedule: To Be Determined

W&I General Program Overview by Gary Lindsey

- Gary was introduced and he provided additional information about himself.
- Gary helps supports all responses to TAP for SME assistance and responses to recommendations.
- Role of W&I TAP Liaison, attend all Project Committee Calls – clarify and forward all TAP questions; identify SME within W&I; solicit W&I topics for TAP Review; monitor status for actions; attend annual TAP Meetings; share information regarding MSP Topics

RECOMMENDATIONS FROM W&I LIAISON FOR THE FY 2019

- Utilize our SMEs prior to the development of recommendations
- Utilize the web for links to important data (previously shared with TAP)
- Notify us about upcoming conference calls in advance when requesting an SME



- When submitting request for reconsiderations, please address the IRS response provided in the original recommendation. It helps if TAP explains why the current language is not sufficient. State what has changed or why the current response is unacceptable.
- Review IRS approved topics and if working across committees, please share information that the IRS shares with the other groups so that everyone has received all the input provided by IRS prior to working the topic.
- Be cognizant of our timelines. TAP has been doing a great job in this area:
 - 60 days to respond to W&I TAP Issues/Recommendations Submitted for IRS (W&I) to Consider
 - 30 days for requests for reconsideration
 - 30 days for general TAP questions
 - A few days (not designated) for finding W&I SMEs.
- Use the attached website links to research requested information. This is a great go to guide of requested information that I have noticed over the past 3 to 4 years from TAP.
- Oh also, use the attached website links/file and conduct searches on topics being worked by TAP and pay attention to the following items listed on the form:
 - Future State: -use that language to justify TAP recommendations
 - IRS GAO report-- state what the IRS said it would do that supports the TAP Recommendation. It is kind of difficult to reject a recommendation that addresses what we said we would do.
 - Hot News--show that the TAP Recommendation (when appropriate) is obviously an issue that the IRS needs to address
 - IRS statements and announcements--Read and conduct searches on TAP topics to see our latest statements that may support or justify the recommendation being developed by TAP

I think all of this will strengthen the TAP recommendations – from W&I Liaison

TAC Field Assistance Presentation by Field Assistance Director Sue Simon

Presentation by Sue Simon Field Assistance Director to discuss the TAC filed assistance process. Appointments are not required for non-cash payments, filing current year returns or picking up forms. Same day appointments may be made for hardships. Same day appointments may be made if there is staffing available, but taxpayers will be advised to make an advance appointment in the future. The taxpayer would have to wait until someone is available. Sue Simon did indicate that she is looking for help from the TAP for suggestions on how to assist taxpayers who come in without appointments while still serving taxpayers who have made appointments. This Project proposal has been loaded on SAMS as Issue 40513.



Reviewing of IRS Responses

- Issue # 37360
- Issue # 38550
- Issue # 35292

Issue # 37360 generated two response documents from IRS. Issue # 38550 generated seven response documents from IRS. Issue # 35292 generated one response from IRS. The Committee determined that more time was needed to do a complete review of all of the responses before a decision could be made on accepting them. Issue # 38550 will be reviewed by Subcommittee 1. Issue # 37360 and Issue # 35292 will be reviewed by Subcommittee 2.

Screening

The Committee reviewed the New Issue Screening Report. As the report included all the new issues that had come in since November 2018, they were not able to make determinations on all the issues and will review the remaining items to make determinations at the April 2019 meeting. They did determine to drop the following items:

- Issue # 40302 is a legislative matter
- Issue # 40315 is outside the scope of the TAP
- Issue # 40348 is outside the scope of the TAP
- Issue # 40170 will be associated with Issue # 40169 as a duplicate issue.

Parking Lot

Issue # 40046 Proposed Transcript System from the Parking Lot was reviewed. The Committee determined that this matter has been resolved and the issue will be dropped.

Monitoring IRS Action

Issue # 34969 Operating Hours of TAC – Express Services. The Committee determined that additional research needs to be done to determine if IRS has completed appropriate actions on this matter. This issue has been assigned to Subcommittee 1.

Review of Active Projects

Issue # 36900 40-50 Minutes on Hold Just to Make an IRS Appointment. The Committee determined that additional research needs to be done to determine the next steps on this matter. We will need to contact IRS and determine the current hold times and level of service on the appointment toll free line. This was assigned to Subcommittee 2.



Subcommittee Breakouts

Subcommittee 1 and Subcommittee 2 broke out to separate areas to review the issues they have been assigned and determine if there was any additional information they will need. They worked on getting a list of questions for Matt O'Sullivan to research.

End of Day/Announcements

Chair Kathryn Tracy and DFO Terrie English closed the meeting and discussed the progress made so far. Matt O'Sullivan reminded the Committee members that the tour of the TAC office will start at 8:00 A.M. tomorrow.

March 22, 2019 - Meeting

The day started with a tour of the TAC office led by the TAC Manager Letitia Harris. She showed us the waiting area where customers can wait until called for their appointments. We did notice that there is a notice on the door with the phone number taxpayers can call for appointments. They also have a list posted for the services that do not require appointments. The cubicles where customers meet with the TAC employees do have sliding doors that can be closed to provide a degree of privacy. They also have PIN PADS taxpayers can use to enter their social security numbers. Letitia explained that if the PIN PADS do not work, taxpayers will be asked to write down their social security numbers. This does provide some degree of protection from possible ID Theft. One of the Committee members noticed that there is a large TV screen in the waiting area and wanted to know if it could be set to scroll relevant information to the taxpayers. Letitia indicated that the TAC office does not have control of what is displayed. A Committee member did note that while there is information about the Taxpayer Advocate Service in the waiting area the Taxpayer Bill of Rights was not posted there. We may consider making recommendation to that effect.

Subcommittee Breakout Groups

Subcommittee 1 and Subcommittee 2 broke out to separate areas of the office to resume the review of their assigned issues.

Subcommittee Report Out

Subcommittee 1 Lead Emmanuel Smith reported that they are still going through all the responses from the IRS on Issue 38550 and that they should make their determinations in time for the April full Committee meeting. One item they are focusing on concerns a suggestion that Field Assistance management have regular conference calls with security services to verify that walk in taxpayers are consistently being treated appropriately. The Subcommittee will also continue the review of Issue 34969.

Subcommittee 2 Lead Patrick Townsend indicated that Subcommittee 2 would like to do the review of issue 40513, the proposal that came from W&I concerning serving walk ins while still serving taxpayers who make appointments. On Issue 36900, concerning the hold times on the



phone to make an appointment, he indicated that we need current information on hold times and the level of service. Matt O'Sullivan will request information on this. The Subcommittee will continue research on Issue 37360 concerning privacy issues in the TAC offices.

Travel Discussion

Annie Gold of the TAP staff discussed travel issues with the Committee members. She explained what items of documentation need to be submitted to verify travel expenses and where and when to submit the documentation.

Meeting Assessment/ Next Steps Meeting Closed

Terrie English and Kathryn Tracy led the discussion of what we accomplished during the meeting and the meeting was adjourned.

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



**Taxpayer Assistance Center (TAC) Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
April 11, 2019**

Designated Federal Officer

- Susan Jimerson

Attendance

- | | | |
|---------------------|---------------------|------------|
| • Tasheka Dorsey | Darrow, LA | Member |
| • Richard Herman | Fresno, CA | Member |
| • Harold Manasa | Hendersonville, NC | Member |
| • Andrea Price | Sylvania, OH | Vice-Chair |
| • Emmanuel Smith | Lexington, KY | Member |
| • James Sowell | Panama City, FL | Member |
| • Patrick Townsend | Prairie Village, KS | Member |
| • Kathryn Tracy | Buckeye, AZ | Chair |
| • Anthony Whitmarsh | San Marcos, CA | Member |

Staff

- Terrie English, TAP Director
- Susan Jimerson, Designated Federal Officer
- Matthew O’Sullivan, Program Analyst
- Antoinette Ross, Program Analyst
- Conchata Holloway, Program Analyst
- Debra Awalt, W&I
- Tamikio Bohler, W&I
- Ann Wraing, TIGTA
- Annie Gold, TAP Administrative Assistant

Members of the Public

N/A

Roll Call

A quorum was met.

Opening/Welcome – Susan Jimerson

Jimerson welcomed everyone to the call and gave a review of the Agenda. There has been a temporary change to the TAP Staff. Otis Simpson, Lead Analyst for Taxpayer Communications Committee (TCC) has been assigned to a 120-Day Detail in another area. While he is away, Conchata Holloway will serve as Lead Analyst. In her absence, Antoinette Ross will serve as back up.

- April 16, 2019, beginning at 2:30 p.m. ET the Internal Communications Committee (ICC) will be having their monthly meeting. They will elect a -Chair and their meeting



dates. ICC will be responsible for the Monthly Newsletter that highlight the work of the project committees and TAP. ICC is also working on the development of the Facebook page.

- April 17, 2019, beginning at 3:00 p.m. ET the Outreach Committee will have their monthly meeting. It is led by Patrick Kusiak, TAP Vice Chair. The ICC members will also attend the meeting.

Members were reminded to turn in their travel reports. This information is needed to process travel vouchers for reimbursement. If members are having any problems completing the necessary paperwork, contact Annie Gold for assistance or contact Jimerson.

National Office Report – Terrie English

English welcomed everyone to the call and expressed her appreciation to all the members for a great Face to Face meeting (FTF). English was able to sit in on the TAC's FTF meetings. TAC is doing a really good job. Members were encouraged to continue the excellent work through the year.

- April 25, 2019 beginning at 1:00 p.m. ET the Joint Committee will have their Monthly Meeting. Members are encouraged to join the call. It will provide the opportunity for members to see how issues move from the Committees to the Joint Committee and from the Joint Committee to IRS. It will also show how the process of the six project Chairs interact and provide information for members considering to be a Chair next year.
- The Recruitment for TAP year 2020 has been opened. TAP members, TAS and IRS employees are asked to share the word about what TAP does. Members were encouraged to ask neighbors, school teachers, policemen, family members, friends and people in their circle to get the word out.
- Record keeping is very important. There was a member of Counsel who came and shared instructions on how to send a copy to the TAP mailbox when sending information. A letter with a checklist will be sent out on April 15, 2019 explaining the process. Everyone should look for it in their mailboxes. Members will respond to the email box with the requested information.

Members were reminded April 15, 2019 is Tax Day, and everyone should be in compliance with their Tax Returns.

Approval of Minutes

The March 21-24, 2019 TAC FTF minutes were approved with corrections.

Chair Report – Kathryn Tracy

Tracy stated one more member was needed to be on the ICC. Members were encouraged to consider if they would like to volunteer for the committee. Appreciation was expressed to all members who have been visiting their local TAC offices. Andrea Price shared a great write up and members were encouraged to read her report. Name badges and Business Cards for the new members are being processed and should be coming out to members soon. Tracy will be participating in the Joint Committee's meeting scheduled on April 25, 2019. If anyone has questions, they would like Tracy to present to the Joint Committee, contact Tracy as soon as possible.

Program Owner Report

Tamikio Bohler stated there were no comments at this time.

Screening Committee Report- Kathryn Tracy

Tracy stated the Screening Committee had their meeting and had several new issues. Two of the issues were placed in Active status. Several issues were dropped, and Matthew O'Sullivan will follow up with IRS. The submitters have been contacted and informed regarding the issues that were dropped. Members were asked if all had read the Screening Report.

Decision: Full Committee Consensus Accept Screening Committee's Report as submitted.

Subcommittee Report

Subcommittee 1

Emmanuel Smith stated he was not able to be on the Subcommittee call. The Outreach did work on

- **Issue 38550, Taxpayers Being Turned Away at TAC Offices** Andrea Price made a site visit to the local TAC. Richard Herman added the Security Guards have implemented in their training and suggestion to the guards is that the training be a part of the hiring process so that Taxpayers would not be turned away improperly. O'Sullivan stated a follow up response from IRS was forwarded to each member. Price added the security is not the same in all the TAC offices. Some guards are able to interact with Taxpayers as they enter in and some are not. Patrick Townsend suggested an IRS employee who is trained be the greeter and direct Taxpayers rather than Security Guards. Jimerson suggested a new issue to address this may be appropriate. English asked if there were any signs in the TAC offices regarding making an appointment and/or taking walk-ins. Price responded yes there were signs.

Subcommittee 2

Townsend stated Subcommittee 2 met and discussed 4 issues.

- **Issue 36900, Wait Times on the Phones to Make TAC Appointments** This issue is a carry over from last year. O'Sullivan will provide additional information from following up with further research. The Subcommittee will wait to review O'Sullivan's response.
- **Issue 37360, Taxpayers needing privacy when in TAC.** Subcommittee 2 considered closing the issue. Or follow up to find out information on the privacy guidelines that are in place. O'Sullivan added the TAC offices have the PIN pads to enter Taxpayers Social Security numbers so that they would not have to say the numbers out loud. The Recommendation from the Subcommittee is to drop this issue.
- **Issue 35292, Taxpayers needing TAC Appointment Confirmation** this is an old issue with a response from IRS that they will look into it. O'Sullivan to provide a follow up. Townsend added a new issue was submitted to O'Sullivan and sent to his mailbox on information for Taxpayers is pending O'Sullivan working the language.
- **Issue 40513, Recommendation to Handle Walk-ins in the TAC Offices** Subcommittee 2 seeking guidance. O'Sullivan provided guidance from IRM. The members will review the information and provide recommendation at next Full



Committee's meeting. Price shared some guidance from the IRM that states Managerial discretion is allowed.

Townsend added the importance of sending a copy of all emails to the TAP mailbox.

Outreach Report

Price stated there was 100% participation in turning in the Activity Reports by the March 25th deadline. Five days prior to the due date, Price will send an email -reminder to all members. The first Outreach Committee meeting is scheduled for April 17, 2019 at 3:00 p.m. ET.

Action Items

Matt stated the following Action Items:

- Close Issue 37360, all the issued agreed from the Screening Report to close
- Update the issues to keep as Active Status
- Appointment Confirmation follow up with IRS.
- Follow up on linking information on new issue.

Reminder to members to volunteer for ICC. Jimerson suggested members send their interest in an Email response.

What is the VITA Project Review, Jimerson stated The VITA Project is looking to have one or two TAP members to participate in the reviewing the following guides:

- **4491, VITA TCE Student Guide**, meeting on 5/7, 8 and 9/2019. The participation will be from 8:00am until 5:00pm daily. There will be a second team meeting in June.
- **46744, VITA Certification Test**, meeting on 5/14, 15 and 16/2019.
- **4012, VITA Resource Guide**, meet on 5/21, 22 and 23/2019.

O'Sullivan will send out a reminder to everyone on the teams and start dates. All meetings will be held virtually within the timeframes 8:00am through 5:00pm daily. Members have the option to volunteer for one or more sessions.

Closing

Jimerson thanked everyone for attending and officially closed the meeting.

**Next Meeting: Thursday, May 9, 2019
3:00 p.m. ET, 2:00 p.m. CT, 1:00 p.m. MT, 12:00 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
May 9, 2019**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer (DFO)

Members Present

- | | | |
|----------------------|---------------------|------------|
| • Tasheka Dorsey | Darrow, LA | Member |
| • Richard Herman | Fresno, CA | Member |
| • Andrea Price | Sylvania, OH | Vice-Chair |
| • James "Jim" Sowell | Panama City, FL | Member |
| • Patrick Townsend | Prairie Village, KS | Member |
| • Kathryn Tracy | Buckeye, AZ | Chair |
| • Anthony Whitmarsh | San Marcos, CA | Member |

Members Absent

- | | | |
|------------------|--------------------|--------|
| • Harold Manasa | Hendersonville, NC | Member |
| • Emmanuel Smith | Lexington, KY | Member |

Staff

- Matthew O'Sullivan, Program Analyst
- Antoinette Ross, Program Analyst
- Conchata Holloway, Program Analyst
- Lisa Billups, Program Analyst
- Kevin Brown, TAP Administrative Assistant

IRS Staff

- Tamikio Bohler, W&I (Wage and Investment)
- Ann Ring, Treasury Inspector General for Tax Administration (TIGTA)
- William "Allen" Gray, TIGTA
- Levi Dickson, TIGTA
- Robert Howes, TIGTA

Members of the Public

N/A

Roll Call

A quorum was met for this meeting.

Opening/Welcome – Susan Jimerson

Jimerson welcomed everyone to the call and reviewed the agenda. Jimerson announced the next Outreach Committee meeting on May 15, 2019. The Internal Communications Committee



meeting is on May 21, 2019. The Chair is Alice Azzaro, Vice-Chair is Robert “Bob” Moretti Vice-Chair. The Joint Committee meeting will be on, May 30, 2019, at 1:30 p.m. ET. The business cards have been ordered for TAP members and they will be mailed out as soon as they are received. The 2018 Annual Report is almost ready to be printed. The application phase for recruitment just closed and the interview phase is next.

National Office Report – Terrie English

N/A

Approval of Minutes

The April 11, 2019 TAC minutes were approved as submitted.

Chair Report – Kathryn Tracy

Tracy reported that the Volunteer Income Tax Assistance (VITA) project teams are actively working this project along with the subcommittees. Tracy encouraged members to reach out to their Local Taxpayer Advocates (LTAs) and to get started meeting with the public. Tracy has a congressional open house outreach event in Arizona coming up in June.

Review IRS Responses

Issue 37360 Refund Delays, Confidentiality, Taxpayer’s Bill of Rights.

ID 1478- Bohler indicated the IRS responded on February 15, 2019, but the issue number was 37360. Bohler indicated the IRS responded with a change of policy. They understand that the architecture and some locations are not fitted to the TAC model, but specific locations need to be provided. The locations we are aware of are being addressed as the leases are due to expire. The official response for this is “Not adopted.” Tracy suggested as part of the response, “Any future locations be fitted to the TAC model.” but she then thought this might be redundant. Sowell motioned; Townsend seconded.

Action: Response accepted, and issue closed.

Issue 38550 Taxpayers Being Turned Away in Error at the TAC Office.

ID 1479- Sub-Committee 1 stated that the subcommittee recommended accepting the IRS’ response, but recommended these concerns be part of the new guard orientation. Tracy reported that as a response the guards have been spoken to about turning taxpayers away and that this is a sister issue to ID 1480 regarding TAC managers reminding guards about this as well. Tracy indicated a new issue regarding having a screener in some locations to hopefully resolve this issue. Townsend motioned; Herman seconded.

Action: Response accepted; issue closed.

ID 1480

Action: Response accepted; issue closed.

ID 1481- The IRS indicated they would adopt recommendation “a” during the next annual update. This is to make changes to the Internal Revenue Manual (IRM). Regarding recommendation “b” there is already guidance as long as the taxpayer arrives within 15 minutes of the appointment. Given there is an issue about some appointments being canceled



during the 15-minute grace period, this issue will be held over to allow the IRS to respond to this specific question.

Issue Held: Follow-up pending

ID 1482- The issue was to assure that IRS employees are following the exception procedures. The IRS responded with Servicewide Electronic Research Program (SERP) alerts to enforce this policy. Price motioned Sowell seconded.

Action: Response accepted; issue closed

ID 1483- Form 15006 change proposed- Issue rejected as resolved by the IRS due to the exception policy already being on the form. Price indicated that the noncash description wording is not as clear as it should be. The language should be consistent. The sign posted on the door to the TAC offices states "Taxpayers do not need an appointment to make a limited payment." Form 15006, How to Schedule an Appointment states, "An appointment is not needed to make a non-cash payment". On the IRS website that list the description of services offered at TAC offices states, "Does not accept cash payments. This issue can be addressed under ID 1485, according to Tracy. Townsend motioned; Herman seconded.

Action: Response accepted; issue closed.

ID 1484-Adequately staff offices- Tracey admitted the best they can in addition, there is "Managerial Exception" in specific cases. They will be a new issue regarding staffing suggestions. Townsend motioned Price seconded.

Action: Response accepted; Issue closed

ID 1485- TAC Signage- Follow-up still pending for this issue according to Price. The language is not accurate on the signs according to what Price has seen. This contradicts the response from IRS as the signs are not reflecting the written guidance. O'Sullivan will work with Bohler on this issue.

Issue Held: Follow-up required.

Issue 36900- 40 to 50 minutes on hold just to schedule an IRS appointment

Action: Issue dropped

Public Comments

N/A

Program Owner Report

Tamikio Bohler indicated the requests have been forwarded to the appropriate units and the responses will be routed to TAP as soon as they are received.

Screening Committee Updates- Kathryn Tracy

There were 17 issues and we agreed to close 12 of them. We adopted four of them to include:

- 40698 VITA training and HSA training
12 closed 4 adopted
- 40699 VITA training to include some collection and offer in compromise options



- 40708- IRS Appointment. Associated with late arrival
- 40782- Regarding the Google Maps link and how to properly refer to this.
- 36543-Being researched. This is the possibility of allowing electronic filing of the Form 1040X and Form 1040N.

Townsend motioned Herman seconded.

Action: Four Recommendations accepted by committee.

Subcommittee Report

Subcommittee 1

O’Sullivan reported Emmanuel Smith visited the Lexington, KY TAC and indicated the situation was consistent with the other offices. Late taxpayers were simply placed in line to be assisted in the order they arrived. Regarding delay letters, the IRS indicated that because there are numerous reasons for late letter to be generated, it would be hard to track such instances. The new issues will be reviewed and assigned out by the committee, according to O’Sullivan.

Subcommittee 2

- Issue 36900, Wait Times on the Phones to Make TAC Appointments

Closed

- Issue 35292, Taxpayers needing TAC Appointment Confirmation

Closed

- Issue 40513, Recommendation to Handle Walk-ins in the TAC Offices

Still ongoing

Action Items

- 38550- Will be updated in Systemic Advocacy Management System (SAMS)
- 37360- Will be updated in SAMS.
- 36900- Will be closed in SAMS.
- Screening report items will be closed.
- Follow up with Bohler for other issues.

Roundtable

The Outreach Report will be deferred until the next meeting according to Jimerson.

Closing

Jimerson thanked everyone for attending and officially closed the meeting.

Next Meeting: Thursday, June 13, 2019.

3:00 p.m. ET, 2:00 p.m. CT, 1:00 p.m. MT, 12:00 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
June 13, 2019**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer

Members Present

- | | | |
|--------------------|---------------------|------------|
| • Tasheka Dorsey | Darrow, LA | Member |
| • Harold Manasa | Hendersonville, NC | Member |
| • Andrea Price | Sylvania, OH | Vice Chair |
| • James Sowell | Panama City, FL | Member |
| • Patrick Townsend | Prairie Village, KS | Member |
| • Kathryn Tracy | Buckeye, AZ | Chair |

Members Absent

- | | | |
|---------------------|----------------|--------|
| • Richard Herman | Fresno, CA | Member |
| • Emmanuel Smith | Lexington, KY | Member |
| • Anthony Whitmarsh | San Marcos, CA | Member |

Staff

- Terrie English TAP Director
- Susan Jimerson, Designated Federal Official
- Lisa Billups, Program Analyst
- Matthew O’Sullivan, Program Analyst
- Antoinette Ross, Program Analyst
- Carolyn Duckworth, Program Analyst
- Debby Awalt, W&I
- Tamikio Bohler, W&I
- Annie Gold, TAP Administrative Assistant

Members of the Public

N/A

Roll Call

Quorum was met

Opening/Welcome – Susan Jimerson

Jimerson welcomed everyone to the meeting. She shared a review of the Agenda. The following dates were provided for upcoming meetings:

- June 18, 2019 beginning at 3:00 p.m. ET Internal Communications Committee will have their monthly meeting. They are reviewing the Social Media Guide and gathering guidance on the process.



- June 19, 2019 beginning at 11:00 a.m. ET the Outreach Committee will have their monthly meeting. This Committee is lead by Patrick Kusiak and attended by the Vice Chairs of the other Committees.
- June 27, 2019 beginning at 1:30 p.m. ET the Joint Committee will have their monthly meeting. All of the Project Committee Chairs and ICC Chair. They will review and discuss any referrals submitted.
- All Business Cards have been sent out to 2018 TAP members. If any member did not receive their Business Cards, they were encouraged to contact the Analyst to track delivery.
- The Annual Report has been completed and is in National Office being prepared to send out to Members. Copies will be shared with the IRS Commissioner, Nina Olson, National Taxpayer Advocate and the Treasurer. Members should look for their copy in the mail. The electronic copies are being prepared to post onto www.TAPSpace.org and www.Improveirs.org
- Recruitment Interviews are in process. Thank you to all members who volunteered to be a part of the Interview Panel. The Interviews are to be completed by June 28, 2019.
- Matthew O'Sullivan has been selected to take over the Analyst position for the Joint Committee while Gilbert Martinez, who is the Joint Committee's Analyst is away on a Detailed position. Carolyn Duckworth is Detailed in to TAP West and will cover as TAC Analyst while O'Sullivan is away. More information will be shared on the transition.

National Office Report – Terrie English

English welcomed everyone to the call. She provided clarification on the following:

- The scheduled meeting with Nina Olson has not been cancelled. Members will be receiving another invite to attend the call. The Email that was sent out was sent in error. Nina Olson is very excited and will be speaking with Members at that time. The meeting will be June 18, 2019 beginning at 2:00 p.m. ET.
- Members were encouraged to pay attention to the Email sent out explaining the use of a special address to be use when sending Email messages relative to TAP, in the Subject line. Members should use the semi colon address (2019:TAP:title...) so the message will be sent directly to a special mailbox that archives TAP messages. Be sure to include the TAP email address in the "cc" line.

English expressed appreciation to all the members who have been entering the information already when sending messages.

Chair Report – Kathryn Tracy

Tracy welcomed members to the call.

- The VITA work she has been working on is going well. They have started a second revision on Form 6744, The VITA TCE Test and Retest. The work has been completed and ready for the Beta Testing. Joseph Holly and Patrick Townsend have agreed to volunteer and be Beta Testers on the VITA Testers. If there are other members who would like to participate, let O'Sullivan know and he will inform Tracy.
- Members were encouraged to try and get the Issues written up to finalize referrals. Referrals would be sent to the Joint Committee for approval in July.



- Terrie English confirmed each TAC member's name should be listed on the referral when it is submitted.

Public Input

None

Approval of Minutes

May 9, 2019 minutes approved with added corrections.

Program Owner Report – Tamikio Bohler

Bohler informed the Committee on the website www.IRS.gov there is an Outlook Corner option where members can find interesting information that may be useful when conducting Outreach Activities. There is good information on Online Forms, Flyers and other information available on the website. Members were encouraged to take advantage of the site and the information to help with Outreach ideas. There is also a video on the Paycheck Checkup under YouTube and some Fact sheets that may be helpful.

Subcommittee Updates

Subcommittee 1

O'Sullivan stated Subcommittee 1 completed an extensive review and editing was done for the write up of **Issue 40912, Telephone Confirmation of Taxpayers**. This is a follow up to **Issue 34969** that was closed because IRS decision was to do Email confirmations. Subcommittee 1 is asking IRS to expand it because everyone does not have access to Email. During the last Subcommittee meeting Emmanuel Smith had stated he would not be able to continue to be the Lead on this Subcommittee. Members were asked if anyone would like to fill in behind Smith.

- Thank you expressed to Richard Herman for bringing to the Subcommittee's attention the conflict with next month's meeting. Due to the July 4, 2019 Holiday, Subcommittee 1 next month's meeting has been rescheduled and the new date and time July 2, 2019 at 9:00 a.m. PST. The invites will go out to each member later today. This will be a one-time rescheduled date due to the Holiday.

Subcommittee 2

Patrick Townsend stated Subcommittee 2 met and covered several Issues.

- **Issue 40310 and 40311, Printing Transcripts in TAC Offices** were suggested to be placed in the Parking lot for further research.
- **Issue 40698, Modifying VITA Training to include HSA issues**. Townsend will take the lead and write up the referral.
- **Issue 40699 deals with Offer In Compromise**. Tracy will take the lead in writing the referral.
- **Issue 40782, Providing Google Maps**. Whitmarsh offered to write up this Issue and Tasheka Dorsey will assist.

Townsend stated he has participated in assisting with two Recruitment Interviews. He enjoyed being a part of the Interview Panel.

- **Issue 36543** was suggested to be placed in the Parking Lot for additional research. Whitmarsh will assist in coming up with a standardize checklist.

Screening Report

Tracy stated due to scheduling conflicts the Screening Report will be provided during next month's meeting. O'Sullivan will submit another Screening Report to the Committee on next week.

Outreach Report

Andrea Price stated there was 100% participation in receiving the

Outreach Report for the month of April.

- Members are participating in Outreach activities in full numbers
- Emmanuel Smith visited a TAC Office
- 79 hours of TAP work
- 46.3 hours of Outreach
- 9700 targeted audience
- Two feedback suggestions from Taxpayers shared with Townsend

Members were reminded to indicate the number of people spoken to during the actual Outreach Activity, the number of literatures shared and provide the total number of people attending the events. The Outreach Committee meeting was April 15, 2019. A calendar of events is being established to provide Members with events times and dates.

Outreach Report for the month of May

- Eight of nine members submitted their Activity Reports
- Observation; continue to participate in TAP work
- One member visited the TAC office in Fresno
- Price had the opportunity to visit the TAC Office in Columbus and Cincinnati
- 123 TAP hours worked
- 120 Outreach hours worked
- 2,112 total audience reached
- Four suggestions were received and submitted to O'Sullivan for numbers

Members were asked if the Email notifications were helpful.

- Members were encouraged to join the TAP Facebook. Suggestions are due by the 25th of each month.
- Any items to be included in the newsletter should be submitted to Patrick Kusiak by the 17th of each month
- Suggestion to help meet deadline on submitting the Outreach reports was made to complete weekly the hours.
- Members encouraged to add information about the activity to include dates, time, contact person's name and phone numbers to help establish a reference document.
- Encouragement to continue to try and get feedback from Taxpayers

Action Items:

O'Sullivan shared the following Action Items

- Post the corrected Minutes to www.TAPSpace.org
- Send Members an updated Screening Report
- Send out updated invites for Subcommittee meetings change for the month of July.



Thank you to all the Members for all their dedication and hard work. O'Sullivan assured the Committee he will still be involved with TAC while on his Detail to the Joint Committee.

Round Table

Jimerson confirmed it is the Designated person who would be able to submit information to the ICC committee to be placed on Newsletter. The objective is to get the information to them timely.

Closing

Jimerson closed the meeting.

**Next Meeting: Thursday, July 11, 2019
3:00 p.m. ET, 2:00 p.m. CT, 12:00 p.m. MT, 11:00 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 11, 2019**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer

Members Present

- Tasheka Dorsey Darrow, LA Member
- Harold Manasa Hendersonville, NC Member
- Andrea Price Sylvania, OH Vice Chair
- James Sowell Panama City, FL Member
- Patrick Townsend Prairie Village, KS Member
- Kathryn Tracy Buckeye, AZ Chair
- Heidi Hirschfeld TAP Chair

Members Absent

- Richard Herman Fresno, CA Member
- Emmanuel Smith Lexington, KY Member
- Anthony Whitmarsh San Marcos, CA Member

Staff

- Terrie English, TAP Director
- Susan Jimerson, Designated Federal Official
- Matthew O’Sullivan, Program Analyst
- Antoinette Ross, Program Analyst
- Debby Awalt, W&I
- Tamikio Bohler, W&I
- Annie Gold, TAP Administrative Assistant

Members of the Public

N/A

Roll Call

Quorum was met

Opening/Welcome – Susan Jimerson

Jimerson welcomed everyone to the meeting. She shared a review of the Agenda. The following dates were provided for upcoming meetings:

- July 16, 2019 beginning at 3:00 p.m. ET Internal Communications Committee will have their monthly meeting. They look at both internal and external communications.
- July 17, 2019 beginning at 11:00 a.m. ET the Outreach Committee will have their monthly meeting. This Committee is led by Patrick Kusiak.



- July 25, 2019 beginning at 1:30 p.m. ET the Joint Committee will have their monthly meeting. All the Project Committee Chairs and ICC Chair.
- All Business Cards and Name Badges have been sent out to 2018 TAP members. If any member did not receive their Business Cards, they were encouraged to contact the Analyst to track delivery.
- The 2018 Annual Report has been sent out to each Members. Members were advised to contact Jimerson if copies are not received.
- Recruitment Interviews have all been completed with two remaining for rescheduling. The next phase is the Recommendation stage.
- Thank you to all Members who participated in the Interview sessions.

National Office Report – Terrie English

English welcomed everyone to the call.

- Members were encouraged to attend the scheduled meetings.
- TAP Analysts will be in training July 22-26, 2019. They will be available for all scheduled meetings.
- The Recruitment Interviews have all been completed. There are a couple that need to be rescheduled due to personal reasons.
- The National Taxpayer Advocate, Nina Olson's last week will be next week. There will be an event for her in the DC office. English will not be able to attend but will call in to the event. Interviews are being conducted to select a replacement for the NTA's position. The process will not take long to complete.
- FACA updates are being finalized and will be shared with Members. There will be different ways of conducting meetings. More information to come.

Chair Report – Kathryn Tracy

Tracy welcomed members to the call.

- Thank you to Members for doing a great job and working the issues.
- The Joint Committee will be having their meeting in Phoenix in August. Tracy will provide a report to the Members after attending the meeting.
- Richard Herman worked on the VITA Project Publication 4012 and his work has been completed.
- Tracy worked on the VITA 6791 Beta Test. The Test is being sent out to Members to take the test and provide feedback.
- VITA Beta Testing final dates will be July 23 – 25, 2019
- The 2018 Annual Report was sent and after reading, Tracy found it to be excellent and job well done.

Public Input

None

Approval of Minutes

June 13, 2019 minutes approved with added corrections.

Program Owner Report – Tamikio Bohler

Bohler stated the Committee had submitted a recommended to IRS. IRS already has a Google Map listed on the website www.IRS.gov The maps are located by states. Bohler inquired on the status of the Committee's recommendations on desk approaches of Taxpayers when they walk into the TAC without an appointment. Tracy added there has been some ideas on this issue. Andrea Price and Patrick Townsend had shared some good ideas on what had been done in the healthcare community. The Committee will work on the recommendation. Jimerson asked if there was a specific date for the referral to be sent to them. Bohler will follow up to see if there was a specific date the response is needed and report back to the Committee. O'Sullivan suggested Carolyn Duckworth be copied on all responses.

Subcommittee Updates

Subcommittee 1

Tracy informed the Full Committee Richard Herman agreed to be the Chair of Subcommittee

1. O'Sullivan stated Subcommittee 1:

- Discussed the template for recording TAC office visits. Anthony Whitmarsh offered to work on developing the template and Richard Herman had some good ideas. They both are not on the call. The Subcommittee will provide update during next month's meeting.
- A response was received back from IRS on using Recording in the TAC Offices when Taxpayers are visiting. They no longer use the Recordings as the purpose is no longer required.
- Issues 40902 and 40698 were shared with the Attorney Advisors and the SME for their feedback. They have up to 10 days to provide a response back to the Subcommittee. Once received a report back to the Full Committee will be done.

Subcommittee 2

Patrick Townsend stated Subcommittee 2 worked on:

- Issue 40698 proposal to modify VITA Training consolidate Health Savings account. It went through QR with suggestions for their review. There was some formatting suggested and implemented. A response is expected within a week or so.
- Issue 40310 and 40311 suggestions dealing with transcripts are still in the Parking Lot.
- Issue 40699, OIC Expand VITA Scope. Townsend is working with Tracy to come up with a handout for payment possibilities. A response came back from the VITA Site Coordinator. Tracy added the suggestion to discuss further the connection to the Low-Income Tax Clinic for additional information before preparing the referral.
- O'Sullivan pointed out the www.IRS.gov website has a lot of information on the OIC to submit better offers may be helpful.
- Issue 40782 involving the Nina Olson's submission regarding Road Maps is currently on the website
- Google Maps Issues will be worked by the Subcommittee per Tracy's suggestion and Bohler's update.
- Issue 36543, involving E-File the 1040X and 1040NR Issue was determined to be too complex for TAP and the Subcommittee 2 recommended the Issue be dropped.

Decision: Full Committee Consensus drop Issue 36543.

Screening Report

Tracy stated the Screening Committee had a lot of Issues to go through.

- 26 Issues were reviewed
- 34 Issues to be looked at
- 23 Issues were dropped
- 3 Issues kept were left over from June
- 8 Issues will be discussed during next month's meeting
- **Issue 41029, Time Consuming Process in making TAC Appointments** will be kept for further research

Decision: Full Committee Consensus accept the Screening Committee's Report as amended.

Outreach Report

Andrea Price shared the **Outreach Report for the month of June**

- Eight of nine members submitted their Activity Reports
- Observation; continue to participate in TAP work
- Outreach numbers dropped for this month
- Three Members participated in the Interviews; thank you to each Member
- Examples of Outreach participations: Facebook postings, County Picnics, County Chamber of Commerce, High School Alumni, Historical Society, Community Breakfast Rotary Club and an article in the local Newspaper
- Two visits were made to TAC offices in Stockton and Sacramento, CA
- One Member visited TAC office in Phoenix and attended the Congressional open house in the Phoenix area
- 101 TAP hours worked
- 29 Outreach hours worked
- No Taxpayer suggestions received for the month of June
- Outreach Committee monthly meeting was held on June 19, 2019
- Patrick Kusiak challenged Members to reach out to their LTA
- Jerri Hunter, Chair of NCC accepted LTA position in Anchorage, Alaska
- A total of 10 TAP Members volunteered to attend various Tax Forums
- July 01, 2019 Cedric Jeans posted the Table User Guide to www.TAPSpace.org and Members should review

Members were encouraged to continue to turn in their Outreach hours.

Action Items:

O'Sullivan shared the following Action Items

- Post the approved Minutes to www.TAPSpace.org
- Send Members an updated Screening Report
- Update SAMs with Issue 36543 as dropped
- Monitor response from SA and send to Committee



Heidi Hirschfeld thanked Members for their work being done. Jimerson added a designated person will be Acting National Taxpayer Advocate when Nina Olson retires until the selection is made to fill the position.

Closing

Jimerson closed the meeting.

**Next Meeting: August 8, 2019
3:00 p.m. ET, 2:00 p.m. CT, 1:00 p.m. MT, 12:00 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
August 8, 2019**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer

Members Present

- | | | |
|--------------------|---------------------|------------|
| • Tasheka Dorsey | Darrow, LA | Member |
| • Richard Herman | Fresno, CA | Member |
| • Harold Manasa | Hendersonville, NC | Member |
| • Andrea Price | Sylvania, OH | Vice Chair |
| • James Sowell | Panama City, FL | Member |
| • Patrick Townsend | Prairie Village, KS | Member |
| • Kathryn Tracy | Buckeye, AZ | Chair |

Members Absent

- | | | |
|---------------------|----------------|--------|
| • Emmanuel Smith | Lexington, KY | Member |
| • Anthony Whitmarsh | San Marcos, CA | Member |

Staff

- Terrie English, TAP Director
- Susan Jimerson, Designated Federal Official
- Matthew O’Sullivan, Program Analyst
- Carolyn Duckworth, Program Analyst
- Debby Awalt, W&I
- Gary Lindsey, W&I
- Tamikio Bohler, W&I
- Annie Gold, TAP Administrative Assistant

Members of the Public

N/A

Roll Call

Quorum was met

Opening/Welcome – Susan Jimerson

Jimerson welcomed everyone to the meeting. Terrie English could not be on the call today to give the National Office Report. She is in travel status. TAP Staff is having some technical issues with accessing www.TAPSpace.org and www.Improveirs.org . Matthew O’Sullivan will forward information via Email to Members until the system has been repaired. Due to another Staffing change, O’Sullivan will not be leaving the TAC Committee but will remain working with



the TAC and the Joint Committee as Lead Analyst. Carolyn Duckworth will be assisting with Taxpayers Communications Committee. Upcoming meetings for the month of August:

- August 13 – 14, 2019, beginning at 8:00 a.m. ET until 4:30 p.m. ET the Joint Committee will be having their Planning Session in Phoenix, AZ. Members are encouraged to join in and listen by calling (888) 331-8226 and using the Access Code 8874267.
- August 20, 2019 beginning at 3:00 p.m. ET Internal Communications Committee will have their monthly meeting.
- August 21, 2019 beginning at 11:00 a.m. ET the Outreach Committee will have their monthly meeting.
- August 29, 2019 beginning at 1:30 p.m. ET the Joint Committee will have their monthly meeting.

A review of the Agenda was shared with Members on the call today.

Chair Report – Kathryn Tracy

Tracy welcomed members to the call.

- Thank you to Subcommittee 1 and Subcommittee 2 for their good work.
- The VITA Test Testers gave very good feedback. The changes were incorporated into the new VITA Test everyone will be taking to be a VITA volunteer. It should begin in November.
- TAC Members were asked to provide input on the draft Form 1040 for Tax year 2019. Some good discussion on all of the suggestions were held yesterday. The Committee was represented.

Approval of Minutes

July 11, 2019 minutes approved as submitted.

Program Owner Report – Tamikio Bohler

Bohler stated there was no updates for this month's call.

Subcommittee Updates

Subcommittee 1

Richard Herman stated Subcommittee 1 received excellent feedback from the Attorney Advisor on Issue 40902, Telephone Appointment Confirmation for Taxpayers. The Subcommittee utilized the feedback and updated the Referral. It was sent to each Subcommittee member for review. Suggestions from the Full Committee was welcomed. O'Sullivan added he will forward to the internal Quality Review team for their review.

- Andrea Price brought to the Subcommittee's attention the comment from the Attorney Advisor that the IRS does not track "no shows" at the TAC offices. The Subcommittee will discuss during their next meeting if this is an Issue or not.
- The Subcommittee is in the process of developing a template for TAC Office visits. A follow up will be done on the progress. The Subcommittee anticipates getting the template implemented as soon as possible

Subcommittee 2

Patrick Townsend stated Subcommittee 2 had a good productive meeting last week.

- Issue 40699, Expand VITA Scope to Include OIC Issues. Tracy worked this referral. We are working on creating a document explaining collection options that can be provided to VITA/TCE clients. Tracy stated changes were added and O'Sullivan will forward the referral on with a copy to members. They are waiting for Quality Review to look over the referral.
- Issue 40698, Modify VITA Training to Include HSA Issues. Consolidating the HAS training into the Advanced VITA TCE training. TCE language was included in the referral form. Tracy will work with O'Sullivan to finalize the document and add each Member's name from the TAC Committee.

Decision: Full Committee Consensus move Issue 40698 referral forward with added adjustments.

O'Sullivan will provide Tracy with information to present at the next Joint Committee meeting and update SAMS.

- Issue 401266, This Issue involved upgrading some of the Tax Forms. It has been transferred over to the TCC Committee.

Debby Awalt added to some forms are available in large print. They have a Media Center where Braille is available for review. Members were encouraged to reach out to Bohler for further information.

- Issue 40782, Google Map to move the Link to a more permanent location on the IRS website. Bohler provided some suggestions to Anthony Whitmarsh on this Issue. The Subcommittee is working on this Issue and will provide updates during next month's meeting.

Screening Report

Tracy stated due to time constraints the Screening Committee did not have time to review the Issues. O'Sullivan does review all the issues and responds concerns in a timely manner. Jimerson added during the Joint Committee's Planning Session next week, there will be a session to review the current inventory for items that will potentially have projects for next year 2020. There will be an inventory report submitted to Tracy. Members were asked to share any ideas and or thoughts with Tracy or O'Sullivan to be used during the Planning Session.

Outreach Report

Andrea Price shared the **Outreach Report for the month of July 2019**

- Eight of nine members submitted their Activity Reports
- Observation; volunteers are continuing to participate in TAP work
- Outreach Activity numbers were fewer for this month
- Examples of Outreach participations: Facebook postings, County Chamber of Commerce, Historical Society, two members attended Rotary Club meetings, the National Association of Tax Preparers Conference, the Association of Certified Fraud Examiners, the Toledo Metropolitan Counsel of Government, 95.7 Radio Station and a monthly article in the local Newspaper
- Total TAP Hours 147.7 hours and 37.1 Outreach hours worked



- Price participated in the July Toledo Metropolitan Area Council of Government with Law makers. She was able to exhibit TAP with the local vendors. Feedback was received and will be provided during next month's meeting.
- During the July 17, 2019 Outreach meeting, Terrie English reminded the Members how important they are.
- Vice Chairs have voiced concern in getting Members to submit their Activity Reports timely.
- Chairs submit articles with monthly updates for the Newsletter.
- Hodari Brown, representing Michigan attended 25 events, conducted 135 hours with a target audience reached of 72,000 independently.
- Suggested TAP would benefit by developing a TAP Tool Kit to include: Name Badges, Business Cards, TAP Banner with table hooks to cover the front of the tables, Skirt, Table top posters, Taxpayer Bill of Rights, SpeakUp Brochures, Form 1458, TAP Logo, and some Giveaway trinkets.

Internal Communications

Anthony Whitmarsh was not on the call to give a report.

Action Items:

O'Sullivan shared the following Action Items

- Follow up with Whitmarsh on the Template for the TAC by sending an Email message
- Forward Issue 40699 and Issue 40902 to the Internal Quality Review
- Update SAMS with Issue 40698 documentation and inform the Joint Committee it has been referred to them
- Post the approved Minutes to www.TAPSpace.org

Jimerson reminded Members to remember to sign on and listen during the Joint Committee Planning Session. It will be a good time to hear what is going on within TAP.

Closing

Jimerson closed the meeting.

**Next Meeting: September 12, 2019
3:00 p.m. ET, 2:00 p.m. CT, 12:00 p.m. MT, 11:00 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
September 12, 2019**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer

Members Present

- | | | |
|--------------------|---------------------|------------|
| • Tasheka Dorsey | Darrow, LA | Member |
| • Richard Herman | Fresno, CA | Member |
| • Andrea Price | Sylvania, OH | Vice Chair |
| • James Sowell | Panama City, FL | Member |
| • Patrick Townsend | Prairie Village, KS | Member |
| • Kathryn Tracy | Buckeye, AZ | Chair |

Members Absent

- | | | |
|---------------------|--------------------|--------|
| • Harold Manasa | Hendersonville, NC | Member |
| • Emmanuel Smith | Lexington, KY | Member |
| • Anthony Whitmarsh | San Marcos, CA | Member |

Staff

- Terrie English, TAP Director
- Matthew O’Sullivan, Program Analyst
- Antoinette Ross, Program Analyst
- Carolyn Duckworth, Program Analyst
- Kudiratu Usman, Program Analyst
- Tamikio Bohler, W&I
- Annie Gold, TAP Administrative Assistant

Members of the Public

N/A

Roll Call

Quorum was met

Opening/Welcome – Susan Jimerson

Jimerson welcomed everyone to the meeting. She shared the overview of the Agenda. The following upcoming meetings were noted:

- September 17, 2019 beginning at 3:00 p.m. ET the Internal Communications Committee (ICC) will have their meeting.
- September 18, 2019 beginning at 11:00 a.m. ET the Outreach Committee will have their meeting. TAP Vice Chair is the Lead.



- September 26, 2019 beginning at 1:30 p.m. ET the Joint Committee will have their meeting. TAP Chair, Heidi Hirshfeld is the Lead for this Committee. The Project Committee Chairs and the ICC Chair attend the meeting also.

National Office Report – Terrie English

English welcomed everyone to the call. She shared comments from the IRS Commissioner's letter reflecting on the lives that were lost and scared during the incident on September 11, 2001. He encouraged everyone to commit to doing a selfless act with friendship, kindness and peace. Members were thanked for volunteering to be a part of TAP and for their selfless acts of taking time out of their day to volunteer and make the IRS service better for Taxpayers across the Nation.

- TAP 2020 Election for Chair and Vice Chair is approaching. Members were advised of an Email message went out asking for nominations. Encouragement was expressed to all Members to nominate or self-nominate for the positions of Chair or Vice Chair. On September 19, 2019 beginning at 3:00 p.m. ET a meeting has been scheduled for Members to know more about what the duties and responsibilities are for each position. If nominating a person for either position, Members were asked to let the person know to make sure they would be interested the position.
- Members were encouraged to submit their Activity Reports timely. Information from the Reports are used to complete the Annual Report.
- 2019 TAP year end is approaching, Members were encouraged to get all their information in and provide all information needed. There will be a retirement celebration held for Members retiring off TAP. Members were asked to make sure they have submitted a picture of themselves to their Analyst. This will be used during the retirement celebration and to have a copy on file.
- O'Sullivan shared the deadline for nominations for TAP Chair and Vice Chair position is midnight, September 27, 2019.

Chair Report – Kathryn Tracy

Tracy expressed thank you to the Staff and Members for the time they have committed to helping Taxpayers and how to make it easier for them.

- Members were encouraged to run for TAP Chair or Vice Chair position.
- An Email message was sent to Members as a reminder of the meeting on September 19, 2019 for the TAP Chair and Vice Chair roles and responsibilities.
- Tracy has been working on TAC segment of the Annual Report. A copy of the rough draft was sent to Members by Matthew O'Sullivan along with some potential interests for 2020. Discussions will be held on some items that may not make it on the list will be done.
- Tracy attended the Joint Committee's Planning Session meeting held in Phoenix, AZ. It was a productive meeting. It was good to meet all the Chairs from the other Committees and some great ideas were shared during the meeting.
- Discussion will be held by the Full Committee to bring Issue 40699 to a vote.

Approval of Minutes

August 8, 2019 minutes approved with corrections.



Program Owner Report – Tamikio Bohler

Bohler stated a list of approved topics from IRS will be shared with TAP in October for the Committee to work. Questions submitted by the Committee

- what software was used to scheduled appointments; there is a AT&T platform used.
- how does IRS track no show; O’Sullivan added additional information is will be coming.

Subcommittee Updates

Subcommittee 1

Richard Herman stated

- Referral Form 40902, Appointment Confirmation with Taxpayers the Subcommittee I recommended Taxpayers have Email access to be reminded of no shows and/or late arrivals, a recorded telephone or text message sent. It has gone through QA, SA and Attorney Advisor who provided some good feedback. Subcommittee 1 needs the Full Committee’s approval to move forward to Joint Committee.

Decision: Full Committee Consensus move forward Issue 40902 to the Joint Committee for approval

- Subcommittee 1 worked on completing a Template for TAC visitations. Full Committee discussed while viewing the outline of the Template provided. Once the Template has been finalized it will be added to www.TAPSpace.org in a TAP file folder. A copy will be shared with Members during the TAP Annual FTF Meeting.

Subcommittee 2

Patrick Townsend stated Subcommittee 2 report as follows:

- Issue 40310, Suggestion to Make TAC Appointments Online is placed on the Agenda
- Issue 40698, Modify VITA Training, this Issue has been approved and sent to the IRS. O’Sullivan will follow up in November.
- Issue 40699, VITA TCE Payment Options. Tracy worked this referral. Issue was sent to QR, SA and Attorney Advisor. Subcommittee 2 need Full Committee approval to move forward to Joint Committee.

Decision: Full Committee Consensus approve and forward Issue 40699 to the Joint Committee for approval

- Issue 40782, Google Map to move the Link to a more permanent location on the IRS website. This issue will be pushed back to next month due to the Referral being written up. Townsend will follow up and report back.
- Innocent Spouse and information available on IRS website The Subcommittee is currently working and will have more to report during next month’s meeting.

Screening Report

Tracy stated the Screening Committee had a good meeting yesterday. They went over all the issues. The Committee determined three of the Issues would be worked by Taxpayers Communications Committee, Toll Free Committee and Notices and Correspondence Committee.

- 8 Issues were dropped.



- 3 Issues will be kept and worked: Issue 41122, Having better access to TAS offices in major cities, recommended by Taxpayer at an Outreach event attended by Andrea Price. It is on the Agenda for 2020.
- Issue 41120, Where Is My Refund Improvement, will keep this Issue and get feedback from IRS.
- Issue 41273, Obtaining Transcripts, recommend different ways more people can authenticate themselves using a Debit card.

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

Outreach Report

Andrea Price provided the following as inserted:

Seven of the nine TAC committee members (77%) submitted their August Outreach Activity Log. Thank you!

Observations:

- Volunteers participating in TAP work continued and outreach activities were conducted
- Examples of outreach activities conducted are Facebook postings, County Chamber of Commerce, historical society, rotary clubs, IRS Tax Forum, Association of Certified Fraud Examiners local chapter, Mix 95.7 Radio Station, neighborhood breakfast meeting, AA male health initiative walk, local TV (ABC, CBS, FOX) and an article in a local newspaper

Andrea's outreach efforts for Outreach Committee:

- Information posted on two websites: professional and newspaper
- Wrote an article in local newspaper (distributed to 400 sites and 7000 readers)
- A 30-minute radio interview (The Urban Beat) broadcast was on August 4th.
- Participated in the IRS *Tax Forum in Orlando*
- Interviewed on *Conklin & Company* show, 13abc was broadcast on August 11th
- Interviewed on *Leading Edge* show, CBS WTOL 11 was broadcast on August 25th and broadcast on Fox 36 on August 24th
- Hosted a vendor table at the Annual AA Male Health Initiative coordinated by Toledo Fire & Rescue Chief Byrd.
- TAP hours: 113.85 hours
- Outreach hours: 173.80 hours
- Audience reach: 65,335

Suggestions received: TMACOG -3 and TAX Forum -25

Outreach Committee meeting was held on Wednesday, August 21, 2019

- We were reminded that TAP's year ends on November 30th. Next month information will be sent to members who are interested in running for TAP Chair and Vice Chair
- Vice Chairs expressed concern regarding committee members missing in action and requested that the process be streamlined for removing members due to lack of participation
- TAP members are surveyed annually to obtain feedback on how the year went
- TAP is still working on trying to obtain approval for a social media presence



- Members should keep track of expenses when conducting outreach activity even if you do not request reimbursement. It is important for TAP to know the cost associated with these efforts.

Internal Communications

Anthony Whitmarsh was not on the call to give a report.

Action Items:

O'Sullivan shared the following Action Items

- Post approved August 8, 2019 Minutes to www.TAPSpace.org and forward to Kevin Brown to post to www.ImproveIRS.org
- Update Issues from the Screening Report by closing, placing in Active status, transfer and email Committee Analyst the Issue would be better work in their Committee
- Issue 40902 and 40699 update Issues on the system and forward to the Joint Committee

Comments

- If there are any questions or Members need anything, let O'Sullivan know.
- Tracy added during the Joint Committee's Planning Session held in August, one Committee Member suggested to go onto Google and Yelp and review some to the comments for possible issues.
- Price added inmates have been following interviews from prison.
- English added the Roadmap has been sent for printing. A copy would be sent upon request.
- Jimerson added the Roadmap has been posted onto www.TAPSpace.org with a Link and video. A new article was posted on today with this information.

Closing

Jimerson closed the meeting.

**Next Meeting: October 10, 2019
3:00 p.m. ET, 2:00 p.m. CT, 12:00 p.m. MT, 11:00 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
October 10, 2019**

Designated Federal Officer

- Otis Simpson Acting, Designated Federal Officer

Members Present

- | | | |
|------------------|--------------------|------------|
| • Richard Herman | Fresno, CA | Member |
| • Harold Manasa | Hendersonville, NC | Member |
| • Andrea Price | Sylvania, OH | Vice Chair |
| • Kathryn Tracy | Buckeye, AZ | Chair |

Members Absent

- | | | |
|---------------------|---------------------|--------|
| • Tasheka Dorsey | Darrow, LA | Member |
| • James Sowell | Panama City, FL | Member |
| • Emmanuel Smith | Lexington, KY | Member |
| • Patrick Townsend | Prairie Village, KS | Member |
| • Anthony Whitmarsh | San Marcos, CA | Member |

Staff

- Terrie English, TAP Director
- Matthew O'Sullivan, Program Analyst
- Rosalind Matherne, Program Analyst
- Kudiratu Usman, Program Analyst
- Debby Awalt, W&I
- Tamikio Bohler, W&I
- Annie Gold, TAP Administrative Assistant

Members of the Public

N/A

Roll Call

Quorum was not met

Opening/Welcome – Otis Simpson

Simpson welcomed everyone to the meeting. He informed the Committee the meeting will be an Administrative meeting due to the lack of quorum. The overview of the Agenda was shared. Members were reminded of the following upcoming meetings:

- October 22, 2019 beginning at 3:00 p.m. ET the Internal Communications Committee (ICC) will have their meeting.
- October 16, 2019 beginning at 11:00 a.m. ET the Outreach Committee will have their meeting. TAP Vice Chair is the Lead.

- TAP year 2020 Elections has begun and the votes are being submitted. Matthew O’Sullivan shared the candidate statements were posted onto www.TAPSpace.org today. An updated document was posted due to a correction entered. The meet the candidates meeting will be held on next week. There will be a calendar invite sent to members. If any member does not receive the invite, contact O’Sullivan and he will get send it over to you. Ballots will be sent to all members. The completed ballots need to be back by October 25, 2019. The results will be shared on November 01, 2019.
- Volunteers are needed to assist the Annual Report Team. Members will help write the Annual Report for TAP year 2019. They will work with Gilbert Martinez who is the Analyst for the Annual Report. Members who are interested in assisting should contact O’Sullivan who will help connect members with Martinez.
- October 31, 2019 beginning at 1:30 p.m. ET the Joint Committee will have their meeting. This will be the next to last meeting for the TAP year 2019. Members were encouraged to join in on the call.

National Office Report – Terrie English

English welcomed everyone to the call.

- Members were encouraged to take time to read the candidate statements that have been posted onto www.TAPSpace.org
- Some members may not be able to be on the meet the candidate call. They were advised to take the initiative to contact the candidates and get to know them.
- The Chair and Vice Chair will work closely with English
- There have been very strong Chairs and Vice Chairs in the past. Heidi Hirschfeld and Patrick Kusiak have been doing a great job.
- TAP year 2019 is wrapping up and getting prepared for 2020. Members were encouraged to submit their Activity Reports timely. Information from the reports determines the award members are eligible to receive and is used to complete the Annual Report. Members were encouraged to get all their information turned in.
- There will be a retirement celebration held on November 22, 2019 for members retiring off TAP. Fred Smith will be sending a calendar invite to members.

Chair Report – Kathryn Tracy

Tracy welcomed everyone to the call.

- There was a template or TAC visits was submitted to IRS for review. O’Sullivan added no response has been received. It will be added to the action list
- Anticipated response on the new items to work in TAP year 2020 is expected by the end of the month
- There are some issues that are ready for the full committee’s vote and will be done during next month’s meeting due to lack of quorum

Approval of Minutes

September 12, 2019 minutes will be approved during next month’s meeting.

Program Owner Report – Tamikio Bohler



Bohler stated they are looking at the items that were forwarded for feedback and are now waiting for a response. A message was sent to Cedric Jeans and Susan Jimerson for any outstanding items. She added items that have IRS approved topics should be back by the end of October.

Subcommittee Updates

Subcommittee 1

Richard Herman stated they received the response back from Quality Review on Issue 40513, Walk in time slots available at TAC offices. They received good feedback. Members were encouraged to provide additional feedback or comments to the committee. The issue is ready for the Full Committee's vote next month. They also worked on a project committee proposal regarding refund delays. It was submitted to Subcommittee 1 for review. Suggestions or corrections should be sent to Herman.

Subcommittee 2

O'Sullivan shared an update for Patrick Townsend who could not be on the call. Subcommittee 2 worked on Issue 40698 and 40699. They both have gone to IRS and a response is anticipated by the end of November.

- Issue 40782, Google map link for the TAC offices has gone through QR. It will be forwarded to Systemic Advocacy for their feedback. The turnaround time is ten days
- Issue 40310, Making TAC appointments online the subcommittee is working on a project proposal form. Tracy and Townsend are the leads on this issue
- Issue 41541, Trying to get IRS to supply a list of enrolled and unenrolled Tax preparers with sanctions and fines imposed. This issue will be voted on during next month's meeting

Screening Report

Tracy stated the Screening Committee has ten issue they recommend dropping. There are three issues they want to keep. Discussions will take place during next month's meeting.

Outreach Report

Andrea Price shared the September Outreach Report:

- There were seven of nine committee members who submitted their Activity report for September

Observations for the month: Volunteers continue TAP work and Outreach conducted

Examples of Outreach Activities:

- Facebook postings, two Chamber of Commerce meetings, two community breakfasts, historical society, one member went to the IRS Tax Forum in San Diego, one member attended North Carolina CPA meeting, Mix 95.7 Radio station, Central Tax Club of Ohio and an article in local newspaper

Price participated in:

- Posting information on two websites: professional and newspaper
- Wrote article in local newspaper, distributed to four hundred sites and seven thousand readers



- Participated in a thirty-minute radio interview, The Urban Beat will be broadcast on September 1, 2019
- Traveled to Columbus for presentation at Central Ohio Tax Club

TAP hours: 75.9; Outreach hours: 139.20; Audience reached: 31,208

Suggestions received: Two Tax Club and Eleven

The Outreach Committee meeting was held Wednesday, September 18, 2019, It was recommended a project tracking system be developed so committees would be able to track their proposals from the beginning to end. Volunteers are needed for the Annual Report.

Internal Communications

Anthony Whitmarsh was not on the call to give a report.

Action Items

O'Sullivan shared the following Action Items:

- Forward referral for Issue 40782 to the Attorney Advisor and Systemic Advocacy.
- Conduct research to see who will get the assignments
- Update Committee with status of Issue 40513

Thank you to members for working with O'Sullivan during his shared role as Analyst for TAC and the Joint Committee. He has been returned fully to the TAC as Lead Analyst.

Closing

Simpson closed the meeting.

Next Meeting: November 10, 2019
3:00 p.m. ET, 2:00 p.m. CT, 12:00 p.m. MT, 11:00 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
November 14, 2019**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer

Members Present

- Tasheka Dorsey Darrow, LA Member
- Richard Herman Fresno, CA Member
- Andrea Price Sylvania, OH Vice Chair
- James Sowell Panama City, FL Member
- Patrick Townsend Prairie Village, KS Member
- Kathryn Tracy Buckeye, AZ Chair

Members Absent

- Harold Manasa Hendersonville, NC Member
- Emmanuel Smith Lexington, KY Member
- Anthony Whitmarsh San Marcos, CA Member

Staff

- Matthew O’Sullivan, Program Analyst
- Kudiratu Usman, Program Analyst
- Debby Awalt, W&I
- Tamikio Bohler, W&I
- Annie Gold, TAP Administrative Assistant

Members of the Public

N/A

Roll Call

Quorum was met.

Opening/Welcome – Susan Jimerson

Jimerson welcomed everyone to the meeting. The overview of the Agenda was shared. Members were reminded of the following upcoming meetings:

- November 19, 2019 beginning at 3:00 p.m. ET the Internal Communications Committee will have their meeting.
- November 20, 2019 beginning at 11:00 a.m. ET the Outreach Committee will have their meeting. TAP Vice Chair is the Lead
- November 21, 2019 beginning at 1:30 p.m. ET the Joint Committee will have their last meeting for the TAP year.



- November 22, 2019 beginning 11:00 a.m. ET TAP Member 2019 Retirement Celebration. Members were encouraged to attend.
- Members were encouraged to submit their Activity reports and double check to make sure all hours are captured. The hours are vital to the TAP Annual Report.
- The annual survey of membership is coming soon. Members were encouraged to watch for it and complete the survey. Feedback from members on TAP is needed to make improvements. Comments are welcomed.
- Delete all calendar invites going forward through December. There will be new invites sent out in TAP year 2020.
- The date for the 2020 TAP year Face to Face meeting has not been determined. It is anticipated to occur in February or possibly March.
- Returning members were asked to submit their committee preferences. The due date is November 15, 2019. Consider and confirm if your interest is to be a mentor or not. More information will be shared on being a mentor during the Face to Face meeting.
- Congratulations to members who will be retiring at the end of the month: Tasheka Dorsey, Harold Manasa, Richard Herman and James Sowell. Thank you for your service.

Chair Report – Kathryn Tracy

Tracy welcomed everyone to the call.

Approval of Minutes

September 12, 2019 minutes were approved with corrections.

October 10, 2019 minutes were approved with correction.

Program Owner Report – Tamikio Bohler

Bohler stated IRS approved TAP 2020 topics. She shared the following five topics:

- Wait time, IRS is seeking TAP assistance to identify what the data is showing and what Taxpayers are experiencing.
- Free File, IRS is requesting assistance in conducting awareness, promotion, education and Outreach efforts relative to Free File.
- Tax Product Review, to include Form 1099R, distributions from pension, Annuities, Retirement, Profit Sharing IRA, Publication Schedule Withholding and Form 1040, Schedule 1,2 and 3 Additional Income Adjustments, Non-Refundable Credit and Publication 15P Federal Income Tax Withholdings
- VITA training materials
- Revisions related to Form 11652, TAP service needed to determine if the form meets the purpose. There is a questionnaire included for the Form 11652 goes along with Form 1040 Schedule C Profit or Loss of Business.

Thank you to TAP members for all the work and assistance provided and appreciation expressed to the retiring members.

Subcommittee Updates

Subcommittee 1

Richard Herman stated

- Issue 40513 has been completed and is ready to be forwarded to the Joint Committee for their meeting on November 21, 2019.

Decision: Full Committee Consensus move Issue 40513 forward to the Joint Committee.

- Subcommittee 1 completed a project proposal regarding Refund Delays for TAP year 2020 work.

Subcommittee 2

Patrick Townsend stated Subcommittee 2 reviewed several issues:

- Issue 40782, Google map link for the TAC offices has gone through QR. Systemic Advocacy and AA provided feedback to include screenshot of the various webpages. Townsend will rewrite and incorporate the suggestion into the referral. This issue will be carried over into 2020 to be completed.
- Issue 40698 HSA issue was submitted to IRS and will be considered. O'Sullivan added IRS response date was due on November 04, 2019. He followed up with Gilbert Martinez. The suggestion will be considered but implementation will take up to a year.
- Issue 40310, Making TAC appointments online the subcommittee discussed the issued. The referral is with SA and the Attorney Advisor for review. O'Sullivan added a response was received to follow up with them by November 22, 2019.
- Issue 40699 Offer in Compromise was submitted and waiting for IRS response. O'Sullivan added his follow up date is November 27, 2019.

Screening Report

Tracy stated during the last full committee meeting, the Screening Committee had several issues that could not be approved due to the lack of quorum. Yesterday the Screening committee reviewed additional issues. A copy was shared with the full committee. There were seven issues the Screening committee chose to keep and work in TAP year 2020. Six issues will be kept, but not necessarily TAC issues. Four are recommended over to Special Projects, one to Taxpayer Communications and one to Notices and Correspondence. Five issues they did not have time to get to. The others were dropped.

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

Outreach Report

Andrea Price stated:

- There were seven of nine Activity reports were received. Thank you to the members who did submit their reports at 77% participation rate.
- Observations for the month the month of October is continued Facebook posting, Community, Chamber of Commerce, High school reunion, Rotary club and other events. She was able to share information about TAP with the Mayor of Dayton, OH.
- 87 TAP hours; 33.30 Outreach hours; 31,410 Audience reached
- Outreach meeting was held October 16, 2019. The committee was reminded Outreach is an important part of the Annual Report, feedback needed by the end of November from members, budget request for the Face to Face meeting has been submitted, an



email will be shared with members for 2020 committee preference, nineteen new members confirmed for 2020 TAP year and TAP year ends November 25, 2019.

- No meeting will occur after that until the Face to Face meeting in 2020.

Members were reminded to submit their Activity reports.

Internal Communications

Jimerson shared the update in Anthony Whitmarsh's absence.

- CSO is working on the Social Media guide with instructions on how to set up accounts on Facebook, etc. The draft document has been completed. Antoinette Ross sent an email with a preview of the draft guide for members to review.
- ICC has a meeting scheduled for November 19, 2019.
- They are working on a library of content. It will be posted on www.TAPSpace.org to help with Outreach efforts.

Action Items

O'Sullivan shared the following Action Items:

- Clean up and update SAMS on the elevated issue 40513. Forward to Gilbert Martinez to place on the Joint Committee's Agenda.
- Send a confirmation e-mail to members on the status.
- Update the Issues from the Screening report in SAMS.
- Notify the Analysts from the other project committees of the issues being forwarded to them.
- Provide an updated inventory listing to members and post onto www.TAPSpace.org

O'Sullivan shared his appreciation to the members for their continual support and hard work. He recognized the members who stepped up for leadership roles.

Round Table

- Price added Herman had written a couple of proposals relative to Delay of Refund. She suggested it be added to the minutes to show it was already written up. There is no issue number assigned at this time. O'Sullivan will follow up and work on getting it ready for the Face to Face discussions.
- Tasheka Dorsey expressed her gratitude to everyone and added she will miss them.
- James Sowell added he appreciated the interaction and memories with TAP.

Jimerson thanked the following: Debby Awalt and Tamikio Bohler for being on the call. The TAP year had concluded. There have been some good suggestions and moving referrals to the Joint Committee.

Closing

Jimerson closed the meeting.

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