





### **Members of the Public**

- Paul Merrion (via conference call)

Welcome/Announcements/Review Agenda - Susan Jimerson officially opens the meeting at 1:00 p.m. PT.

Self-Introductions/Roll Call – Antoinette “Toni” Ross conducts the roll call  
Susan gives a brief overview of the meeting and then goes over the agenda.  
Jimerson gives a review of the agenda.

Susan informs the members the meeting is also being conducted via WebEx.

TAP Members give official introductions to each other in the order of Anthony, Lin, Sabio, Brookens, Campbell, Brooks, Brown. IRS & attending staff introduces themselves, Jimerson, Simpson, Ross, Holloway, and Bohler.

### **TAP Mission**

Jimerson delivers a presentation on the TAP Mission. Jimerson breaks down the mission and how it affects the programs and the TAP members.

The TAP Charter was discussed and what it covers and what is mandate within the charter. Jimerson tells members what the TAP Objectives are and how the program operates to achieve those objectives such as members being a listening post and the members have a direct access to the IRS business units.

Recommendations-members will work referrals and make recommendations with in each referral. Jimerson covers the role of the TAP Staff and its role within the program. Points out Simpson as this committees point of contact for the Taxpayer Communications Committee (TCC).

TAP Meeting Procedures presented by Otis Simpson

Simpson sends out agendas and pre-reads one week prior the meeting that will included actions items. Simpson also meets with the chair, vice chair, and TAP manager prior to meetings to cover and approve the agenda.

- TAPSpace is the members' only website and it is not open to the public. Simpson covers TAPSpace and the details on how it works. Simpson covers the TAP member information that is on ImproveIRS.org.
- When we use WebEx, Ross will open up the sessions. We do not use the audio, we use the IRS conference call information to communicate via audio.
- Activity Reports - New members will have received this form via TAP manager Cedric Jeans. The Activity Reports are due the 25<sup>th</sup> of the month. Fill out the form and submit it monthly. Annotate all hours and activities not just meetings. Its everything you do for TAP. Simpson gives examples of activities. Jimerson gives more details of TAP activity.

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

Simpson presents information to the members about leadership in TAP. The presentation is So You Want to Be a Chair. The TAP Chair is Heidi Hershfield and Vice-Chair is Patrick Kusiack. Simpson covers the role of the project committee chair, the vice-chair and subcommittee chairs. Simpson gives a presentation on leadership in TAP.

### **Nominations and Election Process (Chair/Vice-Chair)**

- Nominate Candidates
- Self-Introduction/Bios
- Voting

Simpson and Jimerson goes over the TAP nomination and election process.

Nominations and Election Process for Chair/Vice Chair of TCC)

Nominations:

Chair: **Hodari Brown; Sheila Campbell; Patricia Anthony**

Vice Chair: **Ai Lin; Hodari Brown**

Voting and Election Results

Chair               **Patricia Anthony (Garland, TX)**

Vice Chair       **Hodari Brown (Redford, MI)**

### **Establish Quorum & Consensus**

Anthony explains the difference between quorum and consensus. Anthony states this committee needs **6** members to reach quorum to approve meeting minutes and approve referrals to elevate to the Joint Committee.

Approval

- November 29, 2018 Minutes

The committee voted unanimously to approve the November 29, 2018, minutes as written.

Approval of the November 2018 Meeting Minutes. **Minutes approved with edit changes.**

### **IRS Responses Received**

Referral 35819-Refundable Credits Communications (**Committee voted to approve the IRS response**)

### **Wage and Investment Overview**

Presented by Tamikio Bohler (W&I Liaison)



**Tamikio, Cindy Jones (supervisor), and Gary Lindsey (Mikio's backup)  
Mikio spoke about her role in the IRS and her role as liaison to TAP**

Project Committee Work presented by Debra Awalt (Program Owner/SME)

- CAS:AM-Taxpayer Representation via the use of Forms 2848 and 8821)
- CAS:PMO-Tax Professional Online Account

EITC Presentation by Anne Smiley and Ciyata Coleman (RCPPM Representatives)

**Establishment of Subcommittees and Meeting Dates**

- Full Committee (**Second Tuesday of the month at 3:00 p.m. EST**)
- Outreach Committee (Vice Chair) (Hodari Brown)
- Subcommittee 1 (**First Wednesday of the month at 3:00 p.m. EST**)
  - Patricia Anthony
  - Ai Lin
  - Michelle Brookens
  - Robin Sabio (Lead)
  - Carmela Waldron
- Subcommittee 2 (**First Tuesday of the month at 3:00 p.m. ET**)
  - Hodari Brown
  - Sheila Campbell
  - Courtney Brooks (Lead)
  - Millicent Kasal
  - Joe Martin
- Screening Committee
  - Michelle Brookens
  - Sheila Campbell
  - Courtney Brooks
  - Patricia Anthony
- Quality Review (QR) (**Courtney Brooks and Michelle Brookens**)
- Internal Communication Committee (**Robin Sabio and Hodari Brown**)

**New Issue Screening Training**

- New Issue Screening Report
- Parking Lot
- Screening Team Members

**Subcommittee Breakouts**

- Subcommittee 1: CAS:AM-Taxpayer Representation via the use of Forms 2848 and 8821)
- Subcommittee 2: CAS:PMO-Tax Professional Online Account

Subcommittee Report Out



Wrap-up/End of Day/Announcements



**Taxpayer Communications Project Committee  
Taxpayer Advocacy Panel (TAP)  
Face-to-Face Meeting Minutes  
March 22, 2019**

Jimerson welcomed TAP members, made announcements, and reviewed the agenda

Chair Anthony and Jimerson opens the TAP meeting.

Roll call is made. Patricia Anthony, Robin Sabio, Ai Lin; Michelle Brookens; Courtney Brooks, Sheila Campbell, and Hodari Brown

**Staff**

Ross, Simpson, Jimerson, Holloway, and Bohler

**Subcommittee Breakouts**

Subcommittee 1- Issue-40612-IRS Form 2848 and 8821

Subcommittee 2- Issue- Tax Professional Online Account

**Subcommittee Report-out**

The committees convened, and the sub-leads presented the issues they have been working on:

Subcommittee 1 - Issue 40612-Taxpayer understanding of the Third-party authorization process; "Do Taxpayers understand the use and difference of the IRS Forms 8821 and 2848

Subcommittee 2 - Tax Professional Online Account

**Demonstration**

- **TAPspace**-Cedric opens and gives an overview of TAPSpace. Simpson goes through the different menus and their purpose. Simpson instructs members where to input data and on how to drill into the different menu tabs such as Calendar, Outreach, the Document Library and Member Directory.
- **WebEx**  
WebEx was already covered will be covered tomorrow during the face to face training.
- **Activity Reports**  
Simpson displays a blank TAP activity report and directs the members to where they input there TAP activity information. Simpson Breaks down menu items and gives descriptions on what they elude to.
- **Travel**



Jimerson asked if there any questions about travel. No questions were asked.

Susan Jimerson closed the meeting.

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



**Taxpayer Communications Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
April 9, 2019**

**Designated Federal Officer**

- Susan Jimerson, Designated Federal Officer

**Members Present**

- |                    |                    |        |
|--------------------|--------------------|--------|
| • Patricia Anthony | Garland, TX        | Member |
| • Courtney Brooks  | Portland, OR       | Member |
| • Hodari Brown     | Redford, MI        | Member |
| • Ai Lin           | China Lake, CA     | Member |
| • Joe Martin       | Jefferson City, MO | Member |

**Members Absent**

- |                     |                 |        |
|---------------------|-----------------|--------|
| • Michelle Brookens | Taylorville, IL | Member |
| • Sheila Campbell   | Washington, DC  | Member |
| • Millicent Kasal   | Lindstrom, MN   | Member |
| • Robin Sabio       | Buffalo, NY     | Member |
| • Carmela Walrond   | Jersey City, NJ | Member |

**Staff Present**

- Terrie English, TAP Director
- Susan Jimerson, Designated Federal Officer
- Antoinette Ross, Program Analyst
- Conchata Holloway, Program Analyst
- Debra Awalt, W&I
- Tamikio Bohler, W&I
- Diane Garibotto, W&I
- Nadia Bazaroy, W&I
- Julie McCullen, W&I
- Annie Gold, TAP Administrative Assistant

**Members of the Public**

N/A

**Roll Call**

Quorum was not met.

**Opening/Welcome Susan Jimerson**

Jimerson welcome everyone to the call. Appreciation was expressed to all who attended the Face-to-Face meeting held in March. Taxpayer Communications Committee has a temporary Staffing change. Otis Simpson, the Lead Analyst for





this Committee has been Detailed for 120 days to another position and Conchata Holloway will be taking over while he is away. Antoinette Ross will continue to serve as the Backup Analysts for this committee.

- April 16, 2019, beginning at 2:30 p.m. ET the Internal Communication Committee (ICC) will have their first meeting. The members of this committee will elect their Chair and decide when they will have their monthly meetings. The Committee focus is on communications internally and externally that goes out for the TAP. They will work on the monthly Newsletter that reports out for all TAP Committees. It includes a report from TAP Chair and Vice Chair on the different things happening at the Joint Committee level. They are responsible for the administration of the TAP Facebook page. Members who have volunteered to be a part of the ICC were encouraged to attend the call. Members should contact Holloway if unable to attend. This will ensure members receive the copies of the minutes.
- April 17, 2019, beginning at 3:00 p.m. ET. The Outreach Committee will have their first meeting for 2019 TAP year. Members of this committee include the TAP Vice Chairs. Patrick Kusiak is the Lead for this Committee. Discussions are held on the different events for Outreach and strategies for increasing the Outreach for committee members. Hodari Brown was reminded to inform the committee if he would not be able to attend their meetings. He should also contact Holloway so that she would reach out for someone to attend on his behalf.

Thank you to the members who submitted their Travel Reports. Members were reminded to send in their Face to Face travel documents. If there are questions regarding the travel procedures, they are to contact Annie Gold for assistance. Due to quorum not being met, this meeting is an Administrative Meeting. There will be no decisions made on any official business. She shared an overview of the Agenda. She expressed how the Face to Face meetings was a success.

### **National Office Report Terrie English**

English welcomed everyone to the call. The Recruitment Open Season has officially opened as of Monday, April 08, 2019. Members were asked to spread the word about TAP to anyone they may know that would be interested in being a part of TAP. The Staff will be reaching out to members as they will be doing a Media Blitz on TAP. Members will be asked to share their experiences and any information they may want to share relative to TAP. The Staff is reaching out to employees from within IRS and within their communities for possible applicants who may be interested in becoming a member of TAP. The efforts are being done to reach as many people as possible in hopes of gaining the best qualified applicants. The Recruitment period is anticipated to run up to four weeks.

- April 15, 2019, beginning at 1:00 p.m. ET all six project committee Chairs and ICC will be on the call. The call is open to everyone. Encouragement was given to all members to join in on the call. Information will be shared on what happens when working on a project and it goes forth.



- Information that was shared during the FTF meeting on record keeping, had Counsel on the call. The letters that were discussed will go out on April 15, 2019. It will have information on how to send out. If there are question on the letter, member should not hesitate to reach out to Staff for assistance.

### **Chair Report Patricia Anthony**

Anthony thanked the Staff for the Face to Face meeting held in Sacramento, CA. Thank you to all the members who were able to attend. She stated how the training and information was appreciated. Members were asked to review the minutes to be approved at the next full committee meeting.

### **Approval of Minutes**

TCC Face to Face Meeting Minutes approval pending until May.

### **Program Owner's Report**

Debra Awalt stated she did not have any information at this time to share. Diane Garibotto and Nadia Bazaroy shared a presentation from W&I

- Garibotto, stated she works in the Customer Accounts area of the Project Management Office. They work to deliver online services that would ease some of the burdens for Taxpayers and Tax Professionals when working with IRS. There was no Program Owner's Report for this meeting. Tax professionals could submit online rather than to prepare a paper copy. She attended TCC Face to Face meeting and is responding to a Demo request from the Committee. Garibotto attended the FTF meetings. Was asked to provide a Demo of the services that helps articulate what is put online. Bazaroy shared information on the Demo.
- Bazaroy shared information on how the Demo was developed. It includes information from interviewing Tax professional over the past years. She explained how their system works for the Taxpayers being able to communication with IRS. She gave an presented the Demo and explained how the system would benefit Taxpayers. There are no current limits on how many clients can be seen. The system allows the client or Tax Professional to revoke/withdraw authorized access. Information can be obtained through the Freedom of Information Act (FOA).

### **Subcommittee Report**

#### **Subcommittee 1**

Conchata stated the subcommittee needed the presentation from W&I before discussions would be held. Members were reminded to read over documents previously shared by Tamikio Bohler for their review. They will have more after their next meeting to see how they want to proceed.

#### **Subcommittee 2**

Courtney stated the survey form was put together during the Face to Face meeting. A copy will be sent out to the members. The Demo presentation seen



on today will give them additional information. They are aware of the timelines and anticipate having recommendation and referral ready in September.

### **Outreach Report**

The Outreach Report will be shared during next month's meeting.

### **Action Items**

Conchata reminded members to

- Submit their Activity Reports and if they have any questions to contact her and the manager for assistance.
- All Face to Face Travel documents are to be sent in. Members can contact Conchata, Susan or Annie with their information.

### **Closing**

Jimerson closed the meeting.

**Next Meeting: Tuesday, May 14, 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 Communications Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
May 14, 2019**

**Designated Federal Officer**

- Susan Jimerson, Designated Federal Officer

**Members Present**

- |                     |                 |        |
|---------------------|-----------------|--------|
| • Patricia Anthony  | Garland, TX     | Member |
| • Michelle Brookens | Taylorville, IL | Member |
| • Courtney Brooks   | Portland, OR    | Member |
| • Hodari Brown      | Redford, MI     | Member |
| • Ai Lin            | China Lake, CA  | Member |
| • Robin Sabio       | Buffalo, NY     | Member |
| • Carmela Walrond   | Jersey City, NJ | Member |
| • Sheila Campbell   | Washington, DC  | Member |

**Members Absent**

- |                   |                    |        |
|-------------------|--------------------|--------|
| • Millicent Kasal | Lindstrom, MN      | Member |
| • Joe Martin      | Jefferson City, MO | Member |

**Staff Present**

- Terrie English, TAP Director
- Susan Jimerson, Designated Federal Officer
- Antoinette Ross, Program Analyst
- Conchata Holloway, Program Analyst
- Debra Awalt, W&I
- Tamikio Bohler, W&I
- Allen Gray, TIGTA
- Paula Johnson, TIGTA
- Annie Gold, TAP Administrative Assistant

**Members of the Public**

N/A

**Roll Call**

Quorum was met.

**Opening/Welcome Susan Jimerson**

Jimerson welcome everyone to the call. She shared the following to the Full Committee:



- May 21, 2019, beginning at 3:00 p.m. ET the Internal Communication Committee (ICC) will have their meeting. ICC focus is on messaging used internally and externally to the public. Alice Azzaro was elected Chair and Bob Moretti was elected Vice Chair.
- May 15, 2019, beginning at 11:00 a.m. ET. The Outreach Committee will have their meeting. Patrick Kusiak, TAP Vice Chair is the Chair for this committee.
- May 30, 2019, beginning at 1:30 p.m. ET. The Joint Committee will have their meeting. This is a meeting of all the Committee Chairs. They will review and discuss referrals and any action items that affect the TAP program. Members are encouraged to try and attend the Joint Committee's meeting. There will be information shared on what is going on with the TAP Committees.
- The Business Cards have been received in TAP Headquarters office and will be distributed out to members soon.
- Name badges are being ordered for the New Members. They will be mailed out upon receipt.
- The 2018 Annual Report is in the final stages for approval and publishing. Release is anticipated soon.
- The Recruitment period closed on May 03, 2019. More information will be shared by Terrie English.

Jimerson shared an overview of the Agenda.

### **National Office Report Terrie English**

English welcomed everyone to the call. The Recruitment Process has been completed and is closed. The Applications have been ranked and Interviews will be scheduled. There are at least 100 Applicants to be interviewed. Members were encouraged to participate in the Interview process. Lisa Billups is sending out for Email messages to members who may be interested in being volunteers to be involved in the process. Member were asked to watch for the message.

- June 18, 2019, beginning at 2:00 p.m. ET Nina Olson, National Taxpayer Advocate will have a Virtual meeting with everyone. She will give her farewell speech. There will be a calendar invite sent out. Members were asked to mark their calendars.

### **Chair Report - Patricia Anthony**

Anthony thanked everyone for being on the call. She reminded members how important quorum is to the Committee. Having quorum means Meeting Minutes can be approved and decisions can be made on how the committee moves forward. She has participated in several meeting and is obtaining a lot of information. She is looking forward to further work with all members.

### **Approval of Minutes**

TCC Minutes approved as submitted:

- October 16, 2018, Monthly Minutes



- March 21-22, 2019, Face to Face Meeting Minutes
- April 09, 2019, Monthly Minutes

### **Program Owner's Report – Tamikio Bohler**

Bohler stated volunteers are needed to work on Publication 4012 review. There is a quick turnaround of May 31, 2019. If members are interested and want to volunteer, they were asked to submit their names. Jimerson added an Email message will be sent out to all the Committee members asking for volunteers for this project.

### **Subcommittee Report**

#### **Subcommittee 1**

Robin Sabio stated she has been working with Conchata Holloway. Members were asked to look for Email messages from Holloway on meetings. Subcommittee members were reminded to submit any questions or concerns to Holloway. They are working on F8821, F2848. Some members have questions to be placed on the survey. Sabio stressed due to additional questions may be coming in, the Subcommittee will wait and combined all questions prior to adding to the survey. On the first Wednesday of every month the Subcommittee will have a meeting at 3:00 p.m. ET. Bohler informed the Subcommittee if a SME is needed during the June meeting to answer any additional questions, send her an Email message and she will make sure someone will be on the call.

#### **Subcommittee 2**

Courtney Brooks stated Subcommittee 2 had their meeting on last week. They agreed on a timeframe for the survey. They will discuss how to obtain information from Taxpayers on the online portal for Tax preparers. The Subcommittee agreed on a one-month Survey run from June 01 to June 30<sup>th</sup>. Holloway agreed to assist the members in setting up a distribution list that will go out to all TAP Members, Alternates and Retirees. This should help in getting a larger audience. They anticipate having a referral ready in September. The Full Committee agreed to reference the Taxpayers Bill of Rights. Jimerson suggested the Subcommittee try and be specific in which Taxpayers' Bill of Rights they would be referring to.

**Action Item: Holloway will send out copies of the Taxpayers Bill of Rights information to the Subcommittee before the end of the month.**

### **Outreach Report- Hodari Brown**

Brown reminded the Full Committee members:

- All Activity Reports are due to be turned in by the 25<sup>th</sup> of each month. Members were asked to turn in the April Report right away and May Reports by May 25, 2019. When submitting the Reports send to Brown, Jimerson and Holloway. Members were encouraged to write down as soon as possible any time spent on activities. Timely submission makes a big difference in the overall reporting.



- Members were asked to share any ideas they may have and anything they feel may be beneficial to Outreach activities.
- Brown will share all the ideas with the Full Committee members send in for Outreach. Information to be added in the Newsletter should be submitted as well.

### **Internal Communications**

Brown stated any information should be sent to him as soon as possible to get it to the Internal Communications Committee in time to add to the Newsletter. Members were encouraged to sign up for the Facebook page. Alice Azarro, Chair and Bob Moretti, Vice-Chair are over the Facebook and Twitter accounts. Brown stated A Link for Facebook, Twitter and LinkedIn will be shared with members in an Email message.

### **Screening Report – Michelle Brookens**

Brookens stated the first meeting will be June 4, 2019, early in the morning to go over the Issues. They will meet every other month. The meetings are subject to change to every month depending on the issues that come in.

### **Action Items:**

Conchata stated she will:

- Send out a copy of the Taxpayers Bill of Rights to each member to review and decide which ones to include in the messaging and actual Survey.
- Send reminder to Members to submit the Activity Reports on time
- Send reminder for June 4, 2019, Screening Report meeting
- Email the SAMs Ticket number for **Subcommittee 1 the number is 40943, Taxpayer Representation Using Forms 2448 and 8821 Subcommittee 2 the number is 40944, Tax Professional Online Account seeking Taxpayers understanding.**
- Send out the invite for the Subcommittee call to the SME

Toni Ross added when sending in the Activity Reports, Members are able to place April's Report onto May's Report and submit them at the same time. The Reports should be sent to the [www.TaxpayerAdvocacyPanel@irs.gov](mailto:www.TaxpayerAdvocacyPanel@irs.gov) and to Hodari Brown.

### **Closing**

Jimerson closed the meeting.

**Next Meeting: Tuesday, June 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 Communications Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
June 11, 2019**

**Designated Federal Officer**

- Susan Jimerson                      Designated Federal Officer

**Members Present**

- |                     |                 |            |
|---------------------|-----------------|------------|
| • Patricia Anthony  | Garland, TX     | Chair      |
| • Michelle Brookens | Taylorville, IL | Member     |
| • Courtney Brooks   | Portland, OR    | Member     |
| • Hodari Brown      | Redford, MI     | Vice Chair |
| • Ai Lin            | China Lake, CA  | Member     |
| • Robin Sabio       | Buffalo, NY     | Member     |

**Members Absent**

- |                   |                    |        |
|-------------------|--------------------|--------|
| • Sheila Campbell | Washington, DC     | Member |
| • Millicent Kasal | Lindstrom, MN      | Member |
| • Joe Martin      | Jefferson City, MO | Member |
| • Carmela Walrond | Jersey City, NJ    | Member |

**Staff Present**

- Conchata Holloway, Program Analyst
- 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 call. Terrie English is conducting interviews and will not be on the call today. Jimerson gave an overview of the agenda and shared the following information with the Full Committee:

- June 18, 2019, beginning at 3:00 p.m. ET the Internal Communications Committee will have their monthly meeting.
- June 19, 2019, beginning at 11:00 a.m. ET the Outreach Committee will have their monthly meeting.
- June 27, 2019, beginning at 1:30 p.m. ET the Joint Committee will have their monthly meeting. They will be reviewing referrals that have been submitted for consideration.





- The business cards have been sent out to members. Members were encouraged to contact Holloway if they did not receive or need additional cards. ICC did a very nice job in developing the business cards.
- Name badges have been ordered for the new members. They will be mailed out upon receipt.
- The 2018 Annual Report is with the Publisher. The staff is waiting for the Annual Report to be delivered to send the hard copies out. Notification will be posted on [www.ImproveIRS.org](http://www.ImproveIRS.org) and [www.TapSpace.org](http://www.TapSpace.org)
- TAP Staff is in the process of conducting interviews with the assistance from members. Thank you to all members who have volunteered to participate with the interview sessions. There are some very good applicants being interviewed. The interviews are scheduled for completion by June 28, 2019.

### **National Office Report - Terrie English**

June 18, 2019, beginning at 2:00 p.m. ET Nina Olson, National Taxpayer Advocate will have a virtual meeting with everyone. She will give her farewell speech. There will be a calendar invite sent out. Members were reminded to mark their calendars.

### **Chair Report - Patricia Anthony**

Anthony thanked everyone for being on the call. She reminded members how important quorum is to the Committee. An email message was sent to members by Holloway on the importance of quorum. Quorum enables meeting minutes approval and allows decisions to be made on how the committee moves forward.

### **Approval of Minutes**

TCC May 14, 2019, minutes approved as submitted.

### **Program Owner's Report**

There was no Program Owner's Report for this call.

### **Subcommittee Report**

#### **Subcommittee 1**

Sabio stated the Subcommittee is in a regathering stage. There has been a very low participation from members. She is reaching out to reconnect with members. The Subcommittee had a meeting two weeks ago and they had no additional questions. They are waiting on a response from the Point of Contact on questions submitted by Holloway. There will be a report out during the next Full Committee Meeting on how they plan on utilizing the survey.

#### **Subcommittee 2**

Brooks stated notes from their last meeting were sent out to members. The Subcommittee is ready to launch the survey but due to the concerns on using social media, the survey is on hold. Jimerson and Holloway participated in a



meeting with the Communications Staff on how to conduct surveys. They received the message from Holloway regarding the importance of quorum. Jimerson added guidance is being gathered on conducting surveys.

### **Outreach Report**

Holloway shared information on for the Outreach Report. Brown had provided notes to be shared with the Full Committee:

- Activity Reports are due to be turned in by the 25<sup>th</sup> of each month. They were reminded to keep record of any activity and hours and write them down as soon as possible. This would help eliminate forgetting.
- Send copies to [www.TaxpayerAdvocacyPanel@irs.gov](mailto:www.TaxpayerAdvocacyPanel@irs.gov) with a copy to Holloway and Brown.
- Members were asked to share any ideas they may have and anything they feel may be beneficial to Outreach activities.

### **Internal Communications**

Holloway stated any suggestions to be shared are due by the 25<sup>th</sup> of each month. Members should send the information to Brown, Holloway and copy Anthony. Members were encouraged to go out and like the Facebook page for TAP.

### **Screening Report – Michelle Brookens**

Brookens stated the Screening Committee did not receive a copy of the report in time for today's call. They will be cleaning up the Screening Report during their next meeting scheduled for June 19, 2019. They will have a report out during next month's meeting.

### **Action Items:**

Holloway stated:

- Remind Members' Activity Reports are due by the 25<sup>th</sup> of each month. If assistance is needed members were encouraged to reach out to Mentors, Analysts or Jimerson.
- Waiting for a response regarding the survey to come in. Notification will be shared with Members as received on how to roll out the survey.
- As soon as the Screening Committee meets, there will be issues to work. It will be sent out to the Full Committee as soon as possible.

Jimerson added she has been speaking with TAP Management on moving forward with the survey. The IRS/TAS Staff is bound by certain guidelines and must follow when conducting surveys. It takes up to 60 days for the review to be completed on whether it would be appropriate to administer a survey or not. Further guidance is being researched regarding Survey Monkey's use. Members were reminded how important it is to attend scheduled meetings. A Social Media Guide is being worked on with established guidelines for TAP limitations using social media. Members were asked to submit any ideas to be discussed during next month's meeting.



**Closing**

Jimerson closed the meeting.

**Next Meeting: Tuesday, July 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 Communications Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
July 9, 2019**

**Designated Federal Officer**

- Susan Jimerson                      Designated Federal Officer

**Members Present**

- |                    |                    |            |
|--------------------|--------------------|------------|
| • Hodari Brown     | Redford, MI        | Vice Chair |
| • Courtney Brooks  | Portland, OR       | Member     |
| • Ai Lin           | China Lake, CA     | Member     |
| • Joe Martin       | Jefferson City, MO | Member     |
| • Heidi Hirshfield | Brooklyn, NY       | TAP Chair  |

**Members Absent**

- |                     |                 |        |
|---------------------|-----------------|--------|
| • Patricia Anthony  | Garland, TX     | Chair  |
| • Michelle Brookens | Taylorville, IL | Member |
| • Robin Sabio       | Buffalo, NY     | Member |
| • Sheila Campbell   | Washington, DC  | Member |
| • Millicent Kasal   | Lindstrom, MN   | Member |
| • Carmela Walrond   | Jersey City, NJ | Member |

**Staff**

- Conchata Holloway, Program Analyst
- Antoinette Ross, Program Analyst
- Matthew O’Sullivan, Program Analyst
- Debra Awalt, W&I
- Tamikio Bohler, W&I
- Gary Lindsey, W&I
- Annie Gold, TAP Administrative Assistant

**Members of the Public**

N/A

**Roll Call**

Quorum was not met.

**Opening/Welcome Susan Jimerson**

Jimerson welcomed everyone to the call. Terrie English is in travel status and will not be on the call today. Jimerson gave an overview of the agenda and shared the following information with the Full Committee:

- July 16, 2019, beginning at 3:00 p.m. ET the Internal Communications Committee will have their monthly meeting.



- July 17, 2019, beginning at 11:00 a.m. ET the Outreach Committee will have their monthly meeting.
- July 25, 2019, beginning at 1:30 p.m. ET the Joint Committee will have their monthly meeting.
- The Recruitment Interviews have all been done but two more to finalize the process.
- Name badges have been sent to the New Members and some Returning Members.
- The 2018 Annual Report has been sent out to each Member. If any Member did not receive a copy, they were encouraged to contact the Analyst or Jimerson and a copy will be sent to them.

### **National Office Report**

No report as English was not available for the call.

### **Chair Report – Hodari Brown**

Brown thanked everyone for being on the call. Anthony is out for today's meeting unexpectedly. Due to not meeting quorum this will be an Administrative Meeting. Brown did not have a report to share during the meeting. More information to come during next month's meeting.

### **Approval of Minutes**

The approval of June 11, 2019 Minutes will be done at next month's meeting.

### **Program Owner's Report**

Awalt began by asking if any Members had or will be attending the Tax Forums. The Commissioner has encouraged TAP Members to refer Taxpayers to the W4 Calculator. This would help them not to have unexpected surprises of not receiving the amount of Refund as they did in the previous year. It is in the process of being perfected and you are encouraged to use the W4 Calculator on [www.IRS.gov](http://www.IRS.gov).

### **Subcommittee Report**

#### **Subcommittee 1**

Holloway stated that the Subcommittee had low participation from members on last month. Sabio was the only member who attended and could not finalize a report for Subcommittee 1. They have a meeting set for later this month and will have a report for next month's meeting.

#### **Subcommittee 2**

Brooks stated Subcommittee 2 met on last week. They did some brain storming on their next plan of action to use in distribution of the survey. Jimerson added the TAP Members would be able to conduct the survey without the assistance from the TAP Staff. The IRS employees are not able to participate or be involved in the process.



### **Outreach Report**

Brown stated the Outreach Reports are due by the 25<sup>th</sup> of each month. If there is a holiday on the 25<sup>th</sup>, Members will be given a couple of days after to get the Reports in. Members were reminded to send copies to Brown, the Analyst and to the TAP mailbox at [TaxpayerAdvocacyPanel@irs.gov](mailto:TaxpayerAdvocacyPanel@irs.gov). He encouraged Members to take advantage of the opportunities and be proactive in sharing information about TAP during the Summer months when people are outside doing different activities.

### **Internal Communications**

Brown stated the ICC will report out during next month's meeting.

### **Screening Report**

The Screening Report was tabled for next month's meeting. Holloway stated there were currently 53 Issues that would require the committee to have quorum to make decisions on.

### **Action Items:**

Holloway stated the Screening Report has been placed in the Parking Lot with the summary for next month's meeting.

Jimerson thanked Hirschfield for joining the call. Holloway's detail with TAP will end in two weeks. Expressions of gratitude were shared with Holloway.

### **Closing**

Jimerson closed the meeting.

**Next Meeting: Tuesday, August 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 Communications Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
August 13, 2019**

**Designated Federal Officer**

- Susan Jimerson                      Designated Federal Officer

**Members Present**

- |                    |                    |            |
|--------------------|--------------------|------------|
| • Patricia Anthony | Garland, TX        | Chair      |
| • Hodari Brown     | Redford, MI        | Vice Chair |
| • Courtney Brooks  | Portland, OR       | Member     |
| • Ai Lin           | China Lake, CA     | Member     |
| • Joe Martin       | Jefferson City, MO | Member     |

**Members Absent**

- |                     |                 |        |
|---------------------|-----------------|--------|
| • Michelle Brookens | Taylorville, IL | Member |
| • Robin Sabio       | Buffalo, NY     | Member |
| • Sheila Campbell   | Washington, DC  | Member |
| • Millicent Kasal   | Lindstrom, MN   | Member |
| • Carmela Walrond   | Jersey City, NJ | Member |

**Staff Present**

- Carolyn Duckworth, Program Analyst
- Antoinette Ross, Program Analyst
- Tamikio Bohler, W&I
- Annie Gold, TAP Administrative Assistant

**Members of the Public**

N/A

**Roll Call**

Quorum was not met.

**Opening/Welcome Susan Jimerson**

Jimerson welcomed everyone to the call. Terrie English is participating in the Joint Committee Planning Session and will not be on the call today. Jimerson gave an overview of the agenda and shared the following information with the Full Committee:

- August 20, 2019, beginning at 3:00 p.m. ET the Internal Communications Committee will have their monthly meeting. Alice Azarro will discuss information on the Newsletter, Social Media and ICC items.



- August 21, 2019, beginning at 11:00 a.m. ET the Outreach Committee will have their monthly meeting. Patrick Kusiak TAP Vice Chair will have discussions on Outreach.
- August 29, 2019, beginning at 1:30 p.m. ET the Joint Committee will have their monthly meeting. Referrals that have been elevated for approval will be reviewed.
- [WWW.TapSpace.org](http://WWW.TapSpace.org) has been restored for use by the TAP Staff. Apologies expressed for the inconvenience.

A review of the Agenda was shared with the Committee. Members were encouraged to reach out to other Members of the TCC Committee and encourage their participation in the monthly calls. Quorum is vital to conduct business and make decisions.

### **National Office Report**

No report as English was not available for the call.

### **Chair Report – Patricia Anthony**

Anthony thanked everyone for being on the call. Hodari Brown was given a special thank you for covering the call on last month in Anthony's absence and for all the work he does in Outreach. Due to the Committee not making quorum today's meeting is an Administrative Meeting. It is very imperative that quorum is met in order to make any decisions and conduct business. Anthony will continue to reach out to Members to inquire on absences. Anthony is attending the Joint Committee's Planning Session where Committee deadlines are being discussed.

### **Approval of Minutes**

The approval of June 11, 2019; July 9, 2019 and today August 13, 2019 Minutes will be up for approval during September 10, 2019 meeting.

### **Program Owner's Report**

Tamikio Bohler stated there was no report for this call.

### **Subcommittee Report**

#### **Subcommittee 1**

Duckworth reported that the Subcommittee is busy reviewing Forms 8821 and 2848 along with the and Instructions and will have a discussion to see if there is an issue they have decided to work on. Members were asked to submit any information or suggestions. They will report back by August 23, 2019 if a SME will be needed on the next call. Duckworth added that she previously shared the questions from issue 40613 with the Subcommittee as reminders of what the original concerns were.

#### **Subcommittee 2**

Courtney Brooks stated Subcommittee 2 has been productive. Thank you to Duckworth for all the help she has given. The end of the TAP year is quickly





approaching and the Subcommittee is in the process of writing up their referral. Brown and Joe Martin were thanked for their help in writing the referral. The first draft is expected to be completed by August 23, 2019. By the time it goes through the review process and back to the Full Committee by September 10, 2019, the referral should be ready to be elevated to the Joint Committee by October 01, 2019. The Subcommittee have posted their Minutes on [www.TAPSpace.org](http://www.TAPSpace.org). for Members to view.

### **Outreach Report**

Brown was not able to share the Outreach Report.

### **Internal Communications**

Brown was not able to share the Internal Communications report.

### **Screening Report**

Michelle Brookens was not on the call to share the Screening Report.

### **Action Items:**

Duckworth reemphasized the need to have quorum. She will send out reminders and make telephone calls to each Member to inquire on their participation prior to each meeting. The Committee is falling behind and will have a total of three Full Committee Monthly Minutes to approve at the next Full Committee Meeting on September 10, 2019.

Jimerson thanked everyone for being on the call. She suggested the Committee try and set up a secondary meeting to help catch up on some of the business due. It was suggested to hold a second meeting September 17, 2019 beginning at 10:00 a.m. ET. Duckworth will send out the message to the Full Committee Members and a Federal Registry Notice will be issued.

### **Closing**

Jimerson closed the meeting.

**Next Meeting: Tuesday, September 10, 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 Communications Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
September 10, 2019**

**Designated Federal Officer**

- Susan Jimerson                      Designated Federal Officer

**Members Present**

- |                     |                    |            |
|---------------------|--------------------|------------|
| • Patricia Anthony  | Garland, TX        | Chair      |
| • Michelle Brookens | Taylorville, IL    | Member     |
| • Hodari Brown      | Redford, MI        | Vice Chair |
| • Courtney Brooks   | Portland, OR       | Member     |
| • Sheila Campbell   | Washington, DC     | Member     |
| • Ai Lin            | China Lake, CA     | Member     |
| • Joe Martin        | Jefferson City, MO | Member     |

**Members Absent**

- |                   |                 |        |
|-------------------|-----------------|--------|
| • Millicent Kasal | Lindstrom, MN   | Member |
| • Carmela Walrond | Jersey City, NJ | Member |

**Staff**

- Carolyn Duckworth, Program Analyst
- Antoinette Ross, Program Analyst
- Matthew O’Sullivan, 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 call.

- Robin Sabio has resigned from TAP due to personal conflicts. She was the Lead over Subcommittee 1 and a member on the Internal Communications Committee. Discussions to be made on how to move forward and if there is any Member who would like to work with Hodari Brown on this Committee.
- An additional Full Committee meeting has been scheduled for TCC on September 17, 2019, beginning at 2:00 p.m. ET. This meeting is to catch up on some work items that were not completed due to the lack of Quorum for the past three months. Subcommittee 1 was working on Issue



40613 which focuses on educating the public on the use and the differences between the two Forms 2848 and Form 8821. These are the third-party authorizations and Power of Attorney Forms for third parties to represent Taxpayers before the IRS. This will be a working meeting.

- September 17, 2019, beginning at 3:00 p.m. ET the Internal Communications Committee will have their monthly meeting.
- September 18, 2019, beginning at 11:00 p.m. ET the Outreach Committee will have their monthly meeting. Patrick Kusiak TAP Vice Chair will have discussions on Outreach.
- September 26, 2019, beginning at 1:30 p.m. ET the Joint Committee will have their monthly meeting. All Project Committee Chairs, Vice Chairs and ICC Chair are to be present.
- TAP Election season is approaching for Members to elect TAP 2020 Chair and Vice Chair. Members were sent a message asking for nominations and/or self-nomination for the Chair or Vice Chair position. There will be a Meet the Candidates session in October. Members will submit their votes and the new Chair and Vice Chair will be announced during the first week of November.

A review of the Agenda was shared with the Committee. Terrie English could not attend the call today so there will not be a National Office Report.

### **National Office Report**

No report available in English's absence.

### **Chair Report – Patricia Anthony**

Anthony thanked everyone for being on the call. She attended the Joint Committee's Planning Session that was held in Phoenix, AZ in August. The meeting was a very productive meeting. Discussions were held on how to better serve communities, Chairs and how to better communicate with Taxpayers and Committee Members. She also participated in various conference calls relative to TAP. Members were encouraged to self-nominate themselves for either the TAP Chair or Vice Chair position.

### **Approval of Minutes**

The following TCC Minutes were approved as submitted:

- June 11, 2019
- July 09, 2019
- August 13, 2019

### **Program Owner's Report**

Tamikio Bohler stated information from IRS will be received and shared by early October with the Full Committee with new topics to work on in 2020.

### **Subcommittee Report**



### **Subcommittee 1**

Subcommittee 1 will meet on next week jointly with Subcommittee 2. Members were encouraged to be in attendance for the September 17, 2019 Full Committee meeting. Duckworth will send a calendar invite to Members as a reminder. Although the meeting will be a working meeting for the Full Committee, it will be open to the public. Members will work on a Draft Referral Template to be used going forward.

### **Subcommittee 2**

Courtney Brooks stated Subcommittee 2 completed the Referral and updated the short schedule on September 6, 2019. They added some combined edits from Joe Martin and Millicent Kasal. The Draft was forwarded to Duckworth who forwarded it for review. The Subcommittee will have their next meeting on October 01, 2019 and Full Committee on October 08, 2019 will work on preparing the issue to go forward to the Joint Committee by the end of the month.

### **Outreach Report**

Brown was disconnected and could not share the Outreach Report.

### **Internal Communications**

Brown was not able to share the Internal Communications report.

### **Screening Report**

Michelle Brookens stated the Screening Report has had a difficult time obtaining the Screening Reports.

- 37 New Issues shown in the June's Screening Report. Eight of those Issues were placed in the Parking Lot. Three of them were referred to other Committees and the rest were dropped.
- 10 out of 15 Issues remain in the Parking Lot and 5 were dropped.
- Issue 40044 **Dropped**
- Issue 39723 **Dropped**
- Issue 39724 **Dropped**
- Issue 40099 and Issue 36435 **Dropped**
- Issue 36364 **Dropped**
- Issue 37192 and Issue 40008 **Dropped**

Brookens will work with Duckworth to get an updated Report for any new issues and schedule/prioritize within the next month. A vote will be done on the approval of the Screening Report during next month's meeting.

### **Action Items**

Duckworth thanked the Committee for making Quorum this month and stated the following Action Items:

- Review Draft Referral for Issue 41392 from Subcommittee 2 and forward to AA and SA for Review



- Send calendar invite to the Full Committee Members to be in attendance September 17, 2019
- Remind Members to self-nominate and/or submit nominations for 2020 TAP Chair and/or Vice Chair positions
- Send calendar invite to Subcommittee 1 to attend Subcommittee 2 meeting on October
- Generate another Screening Report and schedule Screening Report meeting

Jimerson thanked everyone for being on the call. TAP Staff is available for any assistance needed. Jimerson's contact phone number is (206) 946-3009. Members were encouraged to call if they had questions.

### **Closing**

Jimerson closed the meeting.

**Next Meeting: Tuesday, September 17, 2019  
2:00 p.m. ET, 1:00 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 Communications Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
September 17, 2019**

**Designated Federal Officer**

- Susan Jimerson                      Designated Federal Officer

**Members Present**

- |                     |                    |        |
|---------------------|--------------------|--------|
| • Patricia Anthony  | Garland, TX        | Chair  |
| • Michelle Brookens | Taylorville, IL    | Member |
| • Courtney Brooks   | Portland, OR       | Member |
| • Sheila Campbell   | Washington, DC     | Member |
| • Ai Lin            | China Lake, CA     | Member |
| • Joe Martin        | Jefferson City, MO | Member |

**Members Absent**

- |                   |                 |            |
|-------------------|-----------------|------------|
| • Hodari Brown    | Redford, MI     | Vice Chair |
| • Millicent Kasal | Lindstrom, MN   | Member     |
| • Carmela Walrond | Jersey City, NJ | Member     |

**Staff**

- Carolyn Duckworth, Program Analyst
- Antoinette Ross, 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 thanked everyone for joining the call. The call will be conducted a little different from the Full Committee calls. This call was scheduled a month ago, in case quorum was not met during the last Full Committee meeting. There was quorum but an issue came up that needed to be addressed. Because the meeting had been set up and posted to FACA, this was a good time to address the issue. It is considered a working meeting to work on the Issue 40613, Taxpayers Understanding of the Representation Forms 2848 and 8821.

She summarized where the Subcommittees are and what is expected in order to have the project completed by the end of November. In March during the Face to Face Meeting the Full Committee divided into two Subcommittees:



- Subcommittee 1 was to work on the project involving the understanding of Forms 2848 and 8821.
- Subcommittee 2 was to work on the Online Application Form that IRS was working on to go live with and Online Application to submit Forms 2848 and 8821.

As the month progressed, Subcommittee 2 has made it through completing the Referral and is now with SA, and the Attorney Advisors for their review. The referral will go back to the Full Committee for their FC meeting in October. This referral is on track for completion by the end of the TAP year.

Subcommittee 1, (working on the understanding of the two forms), combined with Subcommittee 2 so both Subcommittees could work on this issue and complete it due to lack of participation in meetings. Subcommittee 1 needed the support. They also had the resignation of their lead Member support, which brought us to this point. After completing their research, the Subcommittee found that most taxpayers did not understand the differences in the form nor did some Committee Members. The information was reviewed on [www.irs.gov](http://www.irs.gov) to see if instructions for completing the form were clear. The Subcommittee decided there should be a way taxpayers could look at the forms and determine which form would best serve their purpose.

Courtney Brooks agreed to be the Lead on this project.

### **Combined Subcommittee 1 and 2 Discussion**

Brooks stated she did not have all the research that has been gathered. She noticed it was confusing after looking at the forms on [www.irs.gov](http://www.irs.gov). There was no guidance on how to use the forms. A Decision tree was suggested to get the taxpayer to the correct form. Members held discussions on direction to go in writing the Referral. After the discussions, Michelle Brookens volunteered to draft the Referral using key words within 24 hours and forward to the Members for their review/edits. Sheila Campbell will research some proposals.

### **Screening Report**

The Screening Committee has 4 New Issues. Their last combined report was in June. They will have a combined meeting with Subcommittee 1 and Subcommittee 2 on September 24, 2019 at 1:00 p.m. ET

### **Action Items:**

Duckworth provided the following Action Items:

- Send WebX invite to Members for next scheduled meeting
- Send calendar invite to Members for September 24, 2019 beginning at 1:00 p.m. ET
- Wait for Brookens to send Draft Referral for Issue 40613
- Reminder to send copies to Jimerson, Toni Ross and to the [TaxpayerAdvocacyPanel@irs.gov](mailto:TaxpayerAdvocacyPanel@irs.gov) mailbox



Jimerson thanked everyone for being on the call.

**Closing**

Jimerson closed the meeting.

**Next Meeting: Tuesday, October 08, 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 Communications Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
October 8, 2019**

**Designated Federal Officer**

- Susan Jimerson                      Designated Federal Officer

**Members Present**

- Patricia Anthony                      Garland, TX                      Chair
- Michelle Brookens                      Taylorville, IL                      Member
- Courtney Brooks                      Portland, OR                      Member
- Hodari Brown                      Redford, MI                      Vice Chair
- Sheila Campbell                      Washington, DC                      Member
- Ai Lin                      China Lake, CA                      Member
- Joe Martin                      Jefferson City, MO                      Member

**Members Absent**

- Millicent Kasal                      Lindstrom, MN                      Member
- Carmela Walrond                      Jersey City, NJ                      Member

**Staff**

- Terrie English, TAP Director
- Carolyn Duckworth, Program Analyst
- Matthew O’Sullivan, Program Analyst
- Otis Simpson, 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 call. The following information was shared:

- October 22, 2019 beginning at 3:00 p.m. ET Internal Communications Committee (ICC). Antoinette Ross will share a calendar invite for the call.
- October 16, 2019 beginning at 11:00 a.m. ET Outreach Committee
- October 31, 2019 beginning at 1:30 p.m. ET Joint Committee and members were encouraged to attend
- The 2020 TAP election nomination phase is now closed. Candidate statements will be posted on [www.TAPSpace.org](http://www.TAPSpace.org) on October 10, 2019. There will be a meet the candidate session on October 17, 2019. Matthew



O'Sullivan will send a calendar invite to members. All votes and ballots are due by midnight on October 25, 2019. Members were instructed to send their ballots to [TaxpayerAdvocacyPanel@irs.gov](mailto:TaxpayerAdvocacyPanel@irs.gov) with a copy to [Matthew.OSullivan@irs.gov](mailto:Matthew.OSullivan@irs.gov). The election results will be communicated with members on November 1, 2019.

- A team for the TAP 2019 Annual Report is being formed. Volunteers are needed to assist with completing the report. First and second year members are encouraged to consider being a part of the team. The report is anticipated to be finalized by the end of January or February 2020. Members interested in participating contact [Gilbert.J.Martinez@irs.gov](mailto:Gilbert.J.Martinez@irs.gov) or send interest to Jimerson who will forward on to Martinez.

A review of the Agenda was shared with the Committee.

### **National Office Report – Terrie English**

English informed the members how good the year has been for TAP.

- Members were encouraged to read the bios and submit their choice for which candidate they would like. She emphasized there are some good-strong candidates this year. She stressed how important members votes are.
- There is one meeting remaining before the close out of this TAP year. Members have done a great job in putting forth the effort and moving forward information to inform the public who TAP is and what TAP is about.
- A Senior Management meeting was held with all the LTAs across the Nations. English participated in the meeting. The LTA commitment is being taken very seriously. They will make sure to reach out to their TAP members. Members will be contacted by their LTA. Members were encouraged to make themselves available. Part of the LTA's requirement is to make sure they have Outreach activities available for members of TAP. Members needing the contact information for their LTA should reach out to the Analyst, Matthew O'Sullivan or Susan Jimerson.
- English stressed how much she is looking forward to TAP being more visible in 2020.

### **Chair Report – Patricia Anthony**

Anthony thanked management for their support and a special thank you to Courtney Brooks for ensuring the referrals were completed and submitted timely. Thank you to Michelle Brookens who also assisted. Thank you to Carolyn Duckworth for all the guidance and assistance given.

Activity reports are to be turned in. If members need assistance, contact Hodari Brown who will be available to assist in the competing of the report. Anthony thanked each member for their role on the committee.



### **Approval of Minutes**

TCC September 10, 2019 and September 17, 2019 Minutes were approved as submitted.

### **Program Owner's Report**

Tamikio Bohler stated TAP topics from IRS Executives will be received and shared by mid-October with the Full Committee providing new topics for TAP to work in 2020.

### **Subcommittee Report**

#### **Subcommittee 1**

Courtney Brooks stated Subcommittee 1 has finalized the following Issues and recommend moving forward to the Joint Committee for their review:

- Issue 40613 originated from Subcommittee 1
- Issue 41392, received from Subcommittee 2

She extended a special thank you to Otis Simpson and Conchata Holloway for their assistance.

**Decision: Full Committee Consensus to forward referrals for Issues 40613 and 41392 to the Joint Committee for IRS consideration**

### **Outreach Report**

Hodari Brown stated for the Outreach report, a couple of emails were sent out requesting the reports be submitted. Members who did not submit their report were encouraged to do so. He named five members still needing to get their reports in. When submitting the reports a copy goes to Brown, Simpson and [TaxpayerAdvocacyPanel@irs.gov](mailto:TaxpayerAdvocacyPanel@irs.gov). Reminder to members to add to their reports phone calls, visits, casual conversations about TAP and meetings. Submission should be done as soon as possible.

### **Internal Communications**

Brown each month committees are to submit what is being worked on. Brown encouraged members to continue doing this. A newsletter is done to cover what the committees are working on. Members were encouraged to monitor [www.TAPSpace.org](http://www.TAPSpace.org) – there are a lot of guidelines and updates being placed on this site.

### **Screening Report**

Michelle Brookens stated the Screening notes were shared with the members of the Screening committee. There have been no new changes. The committee has not meet since the last call. She would like to have a meeting before the end of the TAP year. The note reflected items the committee wanted to drop, remain in the Parking Lot and the ones related to ongoing issues that would remain with this committee or going to other committees. Duckworth added she sent an email to one of the submitters and there were questions on the other one. The Screening report has been posted on [www.TAPSpace.org](http://www.TAPSpace.org)



Simpson informed the committee how important the Screening committee is. When projects do not come from IRS, they will come from the Outreaches and this makes the Screening report work. There will be another meeting scheduled for this year. During the meeting a review and decision on what the committee will work in 2020. He will send the calendar invite to each member on the date and time in November. Jimerson added there is one more Full Committee meeting, one Subcommittee meeting on November 5, 2019. The time was suggested to be used to review what issues the committee wants to work for 2020. Simpson will have all the information ready for the members to view.

**Action Items:**

Duckworth stated this meeting will be her final meeting with TAP and she has enjoyed the time working with each member. The following Action Items were shared:

- Forward both referrals, 40613 and 41392 to the Joint Committee, copy to Jimerson and Simpson.
- Review and post approved and forward approved minutes
- Send Screening notes to members

Anthony thanked Duckworth for all the assistance she provided to the committee.

Simpson thanked Duckworth for covering the Analyst duties in his absence.

Jimerson expressed appreciation to Duckworth and assured her of her presence would be missed.

Duckworth responded with gratitude to the staff and members.

**Closing**

Jimerson closed the meeting.

**Next Meeting: Tuesday, November 12, 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 Communications Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
November 12, 2019**

**Designated Federal Officer**

- Susan Jimerson                      Designated Federal Officer

**Members Present**

- |                     |                    |            |
|---------------------|--------------------|------------|
| • Patricia Anthony  | Garland, TX        | Chair      |
| • Michelle Brookens | Taylorville, IL    | Member     |
| • Courtney Brooks   | Portland, OR       | Member     |
| • Hodari Brown      | Redford, MI        | Vice Chair |
| • Sheila Campbell   | Washington, DC     | Member     |
| • Joe Martin        | Jefferson City, MO | Member     |

**Members Absent**

- |                   |                 |        |
|-------------------|-----------------|--------|
| • Millicent Kasal | Lindstrom, MN   | Member |
| • Ai Lin          | China Lake, CA  | Member |
| • Carmela Walrond | Jersey City, NJ | Member |

**Staff**

- Otis Simpson, Program Analyst
- Tamikio Bohler, W&I
- Debby Awalt, 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 call. Terrie English could not be on the call today. Members were informed this meeting will be the last meeting for TAP year 2019. The following information was shared:

- November 19, 2019 beginning at 3:00 p.m. ET Internal Communications Committee (ICC). Antoinette Ross will share a calendar invite for the call.
- November 20, 2019 beginning at 11:00 a.m. ET Outreach Committee
- November 21, 2019 beginning at 1:30 p.m. ET Joint Committee will review the final referrals for the year.
- November 22, 2019 TAP Member 2019 Retirement Celebration beginning at 11:00 a.m. ET. Retiring members, the National Taxpayer Advocate will be joining the call.



- Members were reminded to turn in their Activity Reports. If assistance is needed, Otis Simpson will be available for help and members are encouraged to reach out to him.
- Members were reminded to submit their 2020 committee preferences and mentors.
- Members were encouraged to take the survey.
- Congratulations and thank you for your service to TAP was extended to Michelle Brookens, Millicent Kasal and Joe Martin on their retirement off the Panel.

A review of the Agenda was shared with the Committee.

### **Chair Report – Patricia Anthony**

Anthony thanked management for their support and a special thank you to Carolyn Duckworth, Courtney Brooks, Conchata Holloway and Otis Simpson for their assistance. She congratulated the retiring members for a job well done. Activity reports are to be turned in. Thank you to Subcommittee 1 and 2 for assisting in getting the work completed and the referrals ready for the Joint Committee.

### **Approval of Minutes**

TCC October 8, 2019 Minutes were approved as submitted.

### **Program Owner's Report**

Tamikio Bohler expressed thank you to TAP for all the recommendations, Outreach activities, questions and issues submitted to them. The 2020 IRS TAP topics for consideration have been submitted. They are looking forward to next year. Debby Awalt added the Committee has done a great job. Congratulations to the members retiring of the committee. She also is looking forward to next.

### **Subcommittee Report**

#### **Subcommittee 1**

Michelle Brookens stated there was nothing new with Issue 40613. It will be submitted to the Joint Committee.

Courtney Brooks stated Issue 41392 has no new information and is waiting to be presented to the Joint Committee on November 21, 2019.

### **Outreach Report**

Hodari Brown reminded member to submit their Outreach reports as soon as possible. Members who did not submit their report were encouraged to do so. Members were encouraged to contact Brown for assistance with completing their reports if needed.

### **Internal Communications**



Brown stated the Internal Communications committee is working on getting the articles in the newsletter on time moving forward.

### **Screening Report**

Brookens stated there was no new information on the Screening Report. Simpson added due to the holiday there are some members on vacation and the final Screening call will be scheduled on next week. He will send an email to members for the meeting.

### **Action Items:**

Simpson thanked the members for their hard work while he was on the detailed position. Thank you to Debby Awalt and Tamikio Bohler for their work and interest in TAP. Members were encouraged to take the survey. The Screening Committee will meet on next week.

Joe Martin shared his appreciation for working on TCC committee all three years.

Michelle Brookens enjoyed the rotation from Special Projects, TAC and the TCC committee.

Jimerson added her appreciation working with members and staff. Members added their appreciation.

Thank you to everyone participating in this last meeting and for making this a successful year with TAP.

### **Closing**

Jimerson closed the meeting.

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