

**Taxpayer Assistance Center Improvements Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Tuesday, March 11, 2021**

**Designated Federal Officer**

- Susan Jimerson                      TAP West Chief

**Attendance**

- |  |   |   |
|--|---|---|
| <ul style="list-style-type: none"> <li>• Philip George</li> <li>• Paula King</li> <li>• Daniel Leatham</li> <li>• Kenneth Lewis</li> <li>• Eugene Lillie</li> <li>• Charles Simineo</li> <li>• Nina Tross</li> </ul> | <ul style="list-style-type: none"> <li>Saint George, UT</li> <li>Lexington, KY</li> <li>Shrewsbury, MA</li> <li>New York City, NY</li> <li>West Deptford, NJ</li> <li>Cheyenne, WY</li> <li>Apollo Beach, FL</li> </ul> | <ul style="list-style-type: none"> <li>Member</li> <li>Member</li> <li>Member</li> <li>Member</li> <li>Chair</li> <li>Member</li> <li>Member</li> </ul> |
|--|---|---|

**Member Absent**

- |  |  |  |
|--|--|--|
| <ul style="list-style-type: none"> <li>• Jamila Akil</li> <li>• Patrice Brown</li> <li>• Edward Donovan</li> <li>• Jessica Wilson</li> </ul> | <ul style="list-style-type: none"> <li>Hazel Crest, IL</li> <li>Brooklyn, NY</li> <li>Cary, NC</li> <li>Byram, MS</li> </ul> | <ul style="list-style-type: none"> <li>Vice Chair</li> <li>Member</li> <li>Member</li> <li>Member</li> </ul> |
|--|--|--|

**Visiting Member**

- Bob Moretti                      Great Falls, MT                      TAP Chair

**Staff**

- |   |  |
|---|--|
| <ul style="list-style-type: none"> <li>• Terrie English</li> <li>• Matthew O’Sullivan</li> <li>• Rosalind Matherne</li> <li>• Annie Gold</li> <li>• Michael Odom</li> <li>• Dale Hawkins</li> <li>• Cindy Jones</li> <li>• Beth Braddock</li> </ul> | <ul style="list-style-type: none"> <li>TAP Director</li> <li>TAP Program Analyst</li> <li>TAP Program Analyst</li> <li>TAP Administrative Assistant</li> <li>Wage &amp; Investment (W&amp;I)</li> <li>W&amp;I</li> <li>W&amp;I</li> <li>W&amp;I</li> </ul> |
|---|--|

**Members of the Public**

None

**Welcome**

Susan Jimerson opened the meeting and welcomed everyone to the call. She shared an overview of the Agenda. Members were informed of the manager’s commitment and oversight of the TAP program along with the DFO Report:

- Part of her duties as the manager is to provide oversight assuring the meetings start and end times are adhered to
- Members volunteered time is valued and appreciated
- Members participation is expected with all members being active and open to accept assignments. If there is a conflict and members are unable to attend or is prevented from participating, members should contact the Analyst or the manager
- Members were encouraged to look over the [www.irs.gov](http://www.irs.gov) website because there is a wealth of information available on the website
- On March 16, 2021 the Internal Communication Committee will have their monthly meeting beginning at 12:00 PM, EDT. They will elect the Chair, schedule their monthly meetings, discuss project work for the monthly Newsletter and administrating of the Facebook page. Matthew O'Sullivan is the Analyst over the ICC
- March 17, 2021 Outreach will have their monthly meeting beginning at 2:00 PM, EDT. The TAP Vice Chair and the Vice Chairs from ICC and the project committees will be in attendance
- Members were encouraged to reach out to the Analyst or Jimerson with a phone call or email with questions or concerns

### **National Office Report**

Terrie English welcomed members to the call. She shared the following updates:

- March 28, 2021 TAP Quarterly meeting is scheduled to be held beginning at 1:00 PM, EDT. Erin Collins, National Taxpayer Advocate will be on the call to share information about TAP moving forward. Maryclaire Ramsey, Executive Director of CSO and Sheila Andrews, Executive Deputy Director, CSO.
- Members were encouraged to attend the meeting. Valuable information will be shared during the call. Information will be sent out to members. If information is not received, members should contact the Analyst
- March 25, 2021 the Joint Committee will have their monthly meeting. They will vote on recommendation to go to IRS for consideration. Members were encouraged to attend the call. Attendance would be helpful for members interested in becoming a Chair
- Tax Forums will be held virtually again this year. IRS will have an Expo room available participants
- Members were encouraged to take advantage of the opportunities available for Outreach. Fred Smith is the Analyst over Outreach
- Members were asked to update their profiles and pictures on the website

### **Chair Report**

Nina Tross volunteered to stand in for Eugene Lillie, NCC Chair. Matthew O'Sullivan shared Lillie contacted some the TAC offices for feedback and ideas.

### **Minutes Approval**

February 09, 2021 TAC Minutes approved as submitted.  
Philip George moved, and Kenneth Lewis seconded

### **Program Owner**

Michael Odom stated there were no open referrals, pending reconsiderations, questions and no requests for a Subject Matter Expert (SME) at this time.

### **Screening Committee**

George stated the Screening Committee had their meeting on March 02, 2021.

- There were four Issues; 43427, 43863, 43943 and 43945 presented. All four were individual issues and were dropped
- Two annual project requests were received from IRS: Project 44272 VITA Project Review and VITA Training Materials and Project 44276 Review of TAC Tips.

**Decision: Full Committee Consensus to accept the Screening Committee's Report to Drop Issues 43427, 43863, 43943 and 43945.**

### **Subcommittee Report**

Subcommittee 1

George provided the following updates:

- Issue 40462 Subcommittee 1 is allowing additional research for a rebuttal.
- Issue 40902 IRS will provide more information by the end of July.

Subcommittee 2

Paula King provided the following updates:

- March 02, 2021 Subcommittee 2 had their monthly meeting
- Issue 40310, Suggestion for Getting transcripts online. The recommendation from Subcommittee 2 is to wait and see if IRS will do anything differently. O'Sullivan will follow up
- Issue 40698, Subcommittee 2 accepted IRS' response.

**Decision: Full Committee Consensus to accept Subcommittee 2 report as submitted**

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

Lewis stated the ICC will have their meeting on March 16, 2021.

- The selection of the Chair and Vice Chair will be held during their meeting
- Their monthly meetings dates and times will be scheduled
- They will hold discussions on the TAP Newsletter
- Members were reminded to submit articles to O'Sullivan by the twenty-fifth of each month

### **Outreach**

Tross stated:

- Outreach will meet on next week
- Activity Reports are due the twenty-fifth of each month
- Members encouraged to submit Outreach hours
- If the LTAs have not reach out to members, members should reach to them and make the contact

### **Action Items**

O'Sullivan stated he will complete the following action items:

- Enter information onto SAMs
- Post approved February 09, 2021 Minutes
- Close Issue 40698 as accepted and adopted
- Provide LTA contact information to members

### **Roundtable**

O'Sullivan thanked everyone for attending the meeting.

Lillie expressed thank you to Tross for filling in coverage.

- He reached out to the LTA
- Activity Reports are good
- Articles should be submitted to O'Sullivan timely
- The Low-Income Tax Clinic is looking for volunteers. Members encouraged to contact their LTA

### **Closing**

Jimerson officially closed the meeting.

**Next Meeting: Thursday, April 8, 2021,  
12:00 PM EDT**

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