

**Taxpayer Assistance Center Improvements Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, August 12, 2021**

Designated Federal Officer

- Susan Jimerson TAP West Chief

Attendance

- | | | |
|-------------------|-------------------|------------|
| • Edward Donovan | Cary, NC | Member |
| • Philip George | Saint George, UT | Member |
| • Paula King | Lexington, KY | Member |
| • Daniel Leatham | Shrewsbury, MA | Member |
| • Kenneth Lewis | New York City, NY | Member |
| • Charles Simineo | Cheyenne, WY | Vice Chair |
| • Nina Tross | Apollo Beach, FL | Member |

Member Absent

- | | | |
|------------------|-------------------|--------|
| • Patrice Brown | Brooklyn, NY | Member |
| • Eugene Lillie | West Deptford, NJ | Chair |
| • Jessica Wilson | Byram, MS | Member |

Staff

- | | |
|----------------------|------------------------------|
| • Matthew O'Sullivan | TAP Program Analyst |
| • Rosalind Matherne | TAP Program Analyst |
| • Conchata Holloway | TAP Program Analyst |
| • Annie Gold | TAP Administrative Assistant |
| • Michael Odom | Wage & Investment (W&I) |

Members of the Public

None

Quorum

Quorum was met.

Welcome

Susan Jimerson opened the meeting and welcomed everyone to the call. A brief overview of the Agenda was provided. The following Designated Federal Official and National Office updates were shared:

- Internal Communications Committee (ICC) will have their monthly meeting on August 18, 2021 beginning at 12:00 PM, EDT. They work with the TAP Newsletter, the Facebook page and other administrative communication items relative to TAP

- The Outreach committee will have their monthly meeting on August 18, 2021 beginning at 2:00 PM, EDT. This meeting is lead by Nina Tross, TAP Vice Chair and is attended by the Vice Chairs of the various committees
- The Joint Committee will have their monthly meeting on August 26, 2021 beginning at 1:30 PM, EDT. The National TAP Chair, Robert Moretti, and TAP Vice Chair Tross will be in attendance along with the Chairs of the other project committees. They review referrals submitted going up to IRS and other Joint Committee business. Members were encouraged to attend
- The W4-P testing is in progress. Michael Odom added it is not to late to volunteer to participate in the testing. There will be two additional days added for volunteers to join. Members were encouraged to send an email to Matthew O'Sullivan who will get the information over to Odom to be included
- The TAP Interviews have been concluded. The interview team will be submitting their recommendations to the TAP Director for selections. It will then go through the review approval process
- Members encouraged to continue to do Outreach and work on referrals to be forwarded to the Joint Committee for approval

Chair Report

Charles Simineo shared the following Chair Report:

- Members who participated in the VITA Project Review were encouraged to submit a write up to O'Sullivan on what was done to be added to the Annual Report. O'Sullivan explained the process and reminded members to begin thinking of what roles was taken during the process

Minutes Approval

July 08, 2021 TAC Minutes were approved as submitted.

Nina Tross moved, and Daniel Leatham seconded

Public Comments

There were no members of the public on the call.

Program Owner

Michael Odom stated:

- There were no open referrals
- No reconsideration requests
- No implementation dates to check
- Two open questions were received: the cell phones in the TAC offices and the status of the TAC office in Bellingham, WA. Answers were received and will be forwarded to the committee today
- Encouragement was shared with members to participate in the W4-P Testing program. Emails with interest and hours should be sent to O'Sullivan who will contact Fred Smith, the Analyst responsible for putting names on the schedule. Tross added encouragement to participate

- Odom will be assigned to a 90-day Detail to SPEC beginning on Monday, August 16, 2021. Tamikio Bohler will be covering Odom's duties during his absence.

Screening Committee

Philip George shared the following updates for the Screening Committee:

- Meeting was held on August 03, 2021
- The Screening is following the same color-coded format for related issues. O'Sullivan shared a copy of the Report prior to the call
- Red coded issues were individual issues. The Screening committee recommend these issues be dropped
- Blue coded issues were individual issues and were not within the TAP scope. They were recommended to be dropped
- Green coded issues had potential to be worked by TAP: Status of the Bellingham, WA office; questions on VITA clients: help for homeless Veterans; questions on inmates asked to contact IRS in person
- Black coded issues were referred to other committees.

**Charles Simineo motioned, and Kenneth Lewis seconded
Decision: Full Committee Consensus to accept the Screening Committee's
Report as submitted.**

Subcommittee Report

Subcommittee 1

George stated Subcommittee 1 had their meeting on August 05, 2021.

- He spoke on **Issue 44274**, The VITA Product Review during meeting that lasted up to four days resulting in a second review of the VITA testing. The work has been completed
- Simineo shared updates on **Issue 44436**, Oil and Gas Royalties. Subcommittee 1 proposed IRS develop a specialty test for VITA to certify volunteers to do oil and gas royalties in the states it applies to. O'Sullivan added it was sent to QR for review. There were some grammatical errors. Discussion will be held during the subcommittee's next meeting

Subcommittee 2

Paula King stated Subcommittee 2 is making progress on the following:

- **Issue #41122**, Accessibility has been submitted to Quality Review and is moving through the process. O'Sullivan added no response from QR has been received. Member feedback was asked to be sent to O'Sullivan within one week before forwarding to SA and the Attorney Advisor. Discussions during the next subcommittee meeting for review
- Recommendation for the Tax Tips is being put into the correct format to move forward. A subcommittee meeting is being scheduled to work on this. Draft form should be ready for the next Full Committee meeting. O'Sullivan is available to assist if needed

Outreach

Charles Simineo shared the Outreach committee did not meet on last month due to participation in the Tax Forums. The experience was interesting.

- Nina Tross added the Forum was challenging. Putting together a list of other opportunities for TAP members who have served their term or leaving TAP but are still interested in serving
- Interaction with the LTAs was encouraged and take advantage of any opportunity to do Outreach.
- Members were reminded to carry their TAP Business cards with them when speaking with family, friends, or colleagues

Internal Communications Committee (ICC)

Lewis shared the following updates for ICC:

- Meeting was held on July 26, 2021
- Discussed TAP's social media presence on Facebook
- Working on the Facebook page prototype that has been set up. They discussed the types of features and how it would look to the public
- An Email was sent to TAP members with the link to the Facebook page. It is currently accessible
- Members were encouraged to view and provide any comments and or suggestions to the members of ICC
- The other project ICC is working on is the TAPSpace Guide. If members have any feedback to enhance the guide were encouraged to share
- O'Sullivan added the TAP logo for the site was discussed along with reaching additional volunteer administrators. Members were encouraged to join in on their meeting for additional information of what is going on with ICC

Action Items

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

- Post approved July 08, 2021 TAC Minutes on www.TAPSpace.org
- Update the system with the approved Screening Report information and follow up by sending a completed inventory report to the committee for interest.
- Make corrections to the project referral **#44436** and send out to members within the next few days

Roundtable

Simineo thanked members for attendance and participation. There were no comments made for the Roundtable.

Jimerson expressed thank you to Simineo for acting in Lillie's absence. Thank you and appreciation to every member for attending their participation. Members interested in participating in the W4-P testing should reach out to O'Sullivan to forward names to the Analyst in charge.



Closing

Jimerson officially closed the meeting.

**Next Meeting: Thursday, September 09, 2021,
12:00 PM EDT**

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