

**Taxpayer Assistance Center Improvements Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Thursday, October 14, 2021**

**Designated Federal Officer**

- Susan Jimerson TAP West Chief

**Attendance**

- |                   |                   |            |
|-------------------|-------------------|------------|
| • Philip George   | Saint George, UT  | Member     |
| • Paula King      | Lexington, KY     | Member     |
| • Daniel Leatham  | Shrewsbury, MA    | Member     |
| • Kenneth Lewis   | New York City, NY | Member     |
| • Eugene Lillie   | West Deptford, NJ | Chair      |
| • Charles Simineo | Cheyenne, WY      | Vice Chair |
| • Nina Tross      | Apollo Beach, FL  | Member     |
| • Jessica Wilson  | Byram, MS         | Member     |

**Member Absent**

- |                  |              |        |
|------------------|--------------|--------|
| • Patrice Brown  | Brooklyn, NY | Member |
| • Edward Donovan | Cary, NC     | Member |

**Staff**

- |                     |                              |
|---------------------|------------------------------|
| • Terrie English    | TAP Director                 |
| • Rosalind Matherne | TAP Program Analyst          |
| • Conchata Holloway | TAP Program Analyst          |
| • Kevin Brown       | TAP Administrative Assistant |
| • Annie Gold        | TAP Administrative Assistant |
| • Debra Awalt       | Wage & Investment (W&I)      |
| • James Bellinger   | Wage & Investment (W&I)      |
| • Tamikio Bohler    | 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. An overview of the Agenda and the following Designated Federal Official updates were shared:

- TAP Chair and Vice Chair election phase has begun. Robert Moretti spoke during the informational session on the roles of the National TAP Chair and Vice Chair. Once a member has been nominated additional information will be shared along with different events.
- The TAP Annual Report Committee meeting was held. They have started work on the development of the TAP 2021 Annual Report. Gilbert Martinez is the lead Analysts overseeing this committee
- TAP year end is approaching with the last day on November 30, 2021. Members were encouraged complete their Activity Reports and the different items to be completed by the end of the year.
- Members who will be retiring off TAP will have a graduation ceremony to celebrate the end of their service. Additional information will be shared
- Internal Communications Committee (ICC) will have their monthly meeting on October 20, 2021 beginning at 12:00 PM, EDT
- The Outreach committee will have their monthly meeting on October 20, 2021 beginning at 2:00 PM, EDT. Nina Tross is the lead for this committee
- The Joint Committee will have their monthly meeting on October 28, 2021 beginning at 1:30 PM, EDT. The committee reviews the different referrals that were sent by the project committees to be forwarded to IRS. The meeting will last for 1.5 hours and Robert Moretti, TAP Chair is the lead for this committee

### **National Office Report**

Terrie English shared the following National Office updates:

- There are some Focus group meetings that will be scheduled before the end of the TAP year.
- One Focus group meeting will occur on October 20, 2021. Ken Corbin will be doing a one-on-one presentation on Tax Pro Accounts. Information will be sent to members encouraging attendance
- The final date to hold the Homeless Focus group meeting will be coming soon
- The Graduation Ceremony for retiring members is anticipated to be held in November. Appreciation will be shown to all graduating members for all the hard work that has been done

### **Chair Report**

Eugene Lillie shared the following Chair Report:

- All Activity Reports were submitted timely except one
- Dan Leatham agreed to do the article for the Newsletter submission
- The Full Committee will be looking at a couple of items to get approved and forwarded to the Joint Committee before the end of the year
- Subcommittee Chairs are encouraged to attend the Joint Committee meetings when submitting a referral

- Members were encouraged to be more detailed on the Activity report
- The Continuing Resolution was approved to December

### **Minutes Approval**

September 9, 2021 TAC Minutes were approved as submitted.  
Nina Tross moved, and Leatham seconded

### **November Full Committee Meeting Date/Time Change**

Nina Tross made the motioned and Paula King seconded

**Decision: Full Consensus November 09, 2021 at 1:00 PM, EDT will be the next meeting date and time**

### **Public Comments**

There were no members of the public on the call.

### **Program Owner**

James Bellinger stated there were no updates at this time. The IRS appreciates the work being done by the members of TAP. He confirmed with Rosalind Matherne work is being done on the EITC report sent.

### **Screening Committee**

Philip George shared the following updates for the Screening Committee:

- Meeting was held on October 05, 2021. Ken Lewis and George attended as members along with Matthew O'Sullivan and Rosalind Matherne from the Staff
- The Screening report has been posted onto [www.TAPSpace.org](http://www.TAPSpace.org)
- Ten Issues were dropped and two other Issues
- One Issue was on the use of IRS Administrative personnel to help process Tax Returns. The Screening Committee did not think this would be appropriate and recommended this Issue be dropped
- The one Issue warranted attention was on the VITA volunteers be given ability to verify the identity of homeless individuals will be held for further research. This issue was recommended to be related to the Focus group on Homeless Taxpayers

**Decision: No Objections, Full Committee adopted the Screening Report as submitted,**

### **Subcommittee Report**

Subcommittee 1

George shared Subcommittee 1 report on the following:

- **Issue #44274**, The VITA Product Review Subcommittee 1 has write ups from Paula King and Charles Simineo posted in the Pre-reads and on [www.TAPSpace.org](http://www.TAPSpace.org)

- **Issue #44436**, Oil and Gas Royalty Training Simineo pointed out a spelling correction in the title. After discussion and edits to the wording, Simineo motioned and Tross seconded the referral be forwarded to the Joint Committee  
**Decision: Full Committee Consensus forwarded Issue 44436 to the Joint Committee for approval**  
**Simineo will attend the Joint Committee's meeting for further clarification**

#### Subcommittee 2

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

- **Issue #44276**, Review of Tax Tips referral has three recommendations: separate in English and Spanish with separate modules, add existing videos available on YouTube and add QR code to the screen  
**Simineo motioned and Tross seconded**  
**Decision: Full Committee Consensus to forward Issue #44276 to the Joint Committee**

#### Outreach

Tross shared the following Outreach Committee updates:

- Discussions were held on the Annual Report. All members will be working on the Annual Report
- Members who participated in the Tax Forums Booth were requested to share their feedback with suggestions on improvements
- Activity reports are being submitted timely
- Tross is looking forward to adding new members

#### Internal Communications Committee (ICC)

Kenneth Lewis shared the following updates for ICC:

- Work has been completed on transitioning from the Facebook group to the Facebook page
- Members were encouraged to sign on to the Instagram page using [www.ImproveIRS.org](http://www.ImproveIRS.org) as the logon. Lewis will send the information out to members
- ICC has been working on reviewing the [www.TAPSpace.org](http://www.TAPSpace.org) Member Guide. It is anticipated to be finalized during their next meeting. All comments or ideas are welcomed

#### Action Items

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

- Post approved September 09, 2021 TAC Minutes on [www.TAPSpace.org](http://www.TAPSpace.org)
- Elevate two referrals: **Issue #44436**, Oil and Gas Royalty Training and **Issue #44276**, Review of Tax Tips
- November 09, 2021 at 1:00 PM, EDT will be the next Full Committee meeting. A reminder and link for WebEx invite will be sent to members

- Update the system with the adopted Screening Report information
- Update SAMS with the referral voted through
- Newsletter article submission for this month
- Reminder to members to submit their Activity Reports timely
- Send the invitation to King and Simineo for the Joint Committee meeting

### **Roundtable**

Lillie inquired if there will be a timeline on the decision to have a live Tax Forum on next year or not. Bellinger will follow up on it. More information to come.

Thank you expressed to Matherne for assisting the EITC issue.

Jimerson expressed thank you and appreciation to members for getting the referrals completed and ready for the Joint Committee. Appreciation expressed all members for the work being done. Great discussion on today and thank you to all for being on the call.

### **Closing**

Jimerson officially closed the meeting.

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

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