

**Taxpayer Assistance Center Improvements Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Thursday, April 8, 2021**

Designated Federal Officer

- Susan Jimerson TAP West Chief

Attendance

- | | | |
|-------------------|-------------------|------------|
| • Jamila Akil | Hazel Crest, IL | Vice Chair |
| • Patrice Brown | Brooklyn, NY | Member |
| • 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 Simoneo | Cheyenne, WY | Member |
| • Nina Tross | Apollo Beach, FL | Member |

Member Absent

- | | | |
|------------------|-----------|--------|
| • Edward Donovan | Cary, NC | Member |
| • Jessica Wilson | Byram, MS | Member |

Staff

- | | |
|----------------------|------------------------------|
| • Matthew O’Sullivan | TAP Program Analyst |
| • Rosalind Matherne | TAP Program Analyst |
| • Annie Gold | TAP Administrative Assistant |
| • Michael Odom | Wage & Investment (W&I) |
| • Dale Hawkins | W&I |
| • Beth Braddock | W&I |

Members of the Public

None

Welcome

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

- TAP Member Recruitment season has officially opened. An announcement will be shared with members. A news alert was posted on www.Improveirs.org inviting individuals to complete the application online. There was a technical glitch on www.USAJobs.gov but it has been addressed and the message will remain on the website until the issue has been resolved

- April 22, 2021 the Joint Committee will have their monthly meeting beginning at 1:30 PM, EDT. It will last for one hour and a half. They will review referrals that are to go to the IRS for consideration, any issues concerning TAP. It is lead by TAP Chair Robert Moretti and Vice Chair Nina Tross, who is a member of TAC. Members were encouraged to attend the meeting
- Internal Communications Committee (ICC) will have their monthly meeting on April 21, 2021 beginning at 12:00 PM, EDT. They work on the monthly Newsletter, Facebook page and other issues affecting communications relating to TAP program
- The Outreach committee will have their monthly meeting on April 21, 2021 beginning at 2:00 PM, EDT. They discuss outreach programs and is lead by Tross
- The Mentorship program is held at the end of the month. It is especially helpful for New Members and alumni members. The program will help members to understand what goes on with the TAP program. This meeting is optional but is encouraged to help understand roles as TAP members

Chair Report

Eugene Lillie thanked everyone for being in attendance on the call. He shared the following:

- Activity Reports are due by the twenty-fifth of each month
- Special thank you to members on the Screening Committee; Kenneth Lewis, Philip George, Tross
- Quality Review; Patrice Brown Charles Simineo
- Leads for Subcommittee 1, Brown and Subcommittee 2, Paula King for doing a wonderful job
- Internal Control; Lewis and Edward Donovan thank you all for stepping up and doing a wonderful job
- Volunteers are needed to assist in reviewing sections of the VITA program. Members were asked if they wanted to volunteer. Lillie advised the task is important and volunteers are necessary to completing the work. He will participate on one of the subcommittees to assist
- He reminded members volunteers are necessary. Getting here is the first step and doing the work is the second step. He will be calling members to inquire of their interest in filling a position or he will assign volunteers. Volunteers for the VITA program review is due to Matthew O'Sullivan by Friday, April 9, 2021

Minutes Approval

March 11, 2021 TAC Minutes were approved with a correction. Tross moved, and King seconded

Program Owner

Michael Odom stated there were no referrals to process at this time. There is one implementation on Issue 40902, Telephone Appointment Confirmation response due by July 30, 2021. There were no pending questions.

Screening Committee

George stated the Screening Committee had a long document to review. Members were acknowledged for doing a great job.

- Their meeting was held on April 06, 2021. Lewis, George, Matthew O'Sullivan, Jimerson and Rosalind Matherne were in attendance
- Thirty Issues were related to refunds. The Screening Committee recommended those Issues be dropped as individual issues
- The older issues related to Identification verifications the Screening Committee agreed to group them all together as one issue 42812. All the other Issues numbers would be closed and listed under the one number
- Charles Simineo brought Issue 44436 on tax issues. The recommendation is the scope of VITA be expanded to include some training or ability to include oil and gas royalties. The Screening committee's recommendation is to accept this issue as an Active Issue
- Older Issues that have been held in the Parking Lot under Active Inventory with various recommendations were recommended to be dropped
- There were four Issues picked up by Subcommittee 2 to work

Decision: Full Committee Consensus to accept the Screening Committee's Report as submitted. Tross moved and Lewis seconded

Subcommittee Report

Subcommittee 1

George provided the following updates:

- Issue 40462, Innocent Spouse was discussed in the committee Lewis provided additional research. Tross will draft the rebuttal
- Issue 40902, Telephone Appointment response is due by the end of July as stated by Odom
- Information from IRS to review for the VITA training program was received and shared with members to review. Response is due to O'Sullivan by Friday, April 9, 2021

Subcommittee 2

King provided the following updates:

- April 1, 2021 Subcommittee 2 had their monthly meeting
- Issue 40310, Suggestion for Getting transcripts online. The recommendation from Subcommittee 2 is to continue to wait on IRS response
- Issue 44276, Review Tax Tips. Once Subcommittee 2 receive information on this Issue they will review. O'Sullivan added IRS had a delay in responding and he will keep the Subcommittee updated
- The following issues were picked up from the Screening Committee:

Issue 40989, No Appointment Available at the TAC
Issue 40112, Accessibility Issue in the Ohio office
Issue 41475, Travel to IRS Office
Subcommittee 2 discussed and decided to combine the three issues into one

- Issue 41533, Online Payment Plan, Subcommittee 2 is doing further research to make user friendly for Taxpayers and will report back to Full Committee
- The Tax Act report pending to begin work

Outreach

Akil stated Outreach has been difficult but is being done by members. She received Activity Reports from some of the members. More Outreach activity is expected moving forward.

- Activity Reports are due the twenty-fifth of each month
- Lillie suggested doing Outreach utilizing the internet, Facetime and Zoom or other social media is easier than doing it in person
- Tross stressed the importance of contacting the LTAs and they are the best resource and first steps in doing Outreach
- Members having trouble connecting with their LTA should bring to the attention of O'Sullivan, Jimerson and copy Lillie. They will facilitate the contact. Jimerson assured members help is available
- Patrice Brown shared she made contact with her LTA a few times over the phone. She will reach out again to get Outreach appointments set up

Internal Communications Committee (ICC)

O'Sullivan shared the following updates for ICC.

- Newsletter posts were posted on April 5, 2021 to www.TAPSpace.org
- Each committee has a section on the report. Members were encouraged to review. It has a lot of good information listed
- Lewis and Donovan volunteered to write the article for next month
- Members were encouraged to submit articles to be added
- Members were reminded to submit articles to O'Sullivan by the twenty-fifth of each month

Action Items

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

- Post approved March 11, 2021 TAC Minutes on www.TAPSpace.org
- Implement the approved recommendations submitted by the Screening Report
- Follow up with members on profile updates to www.TAPSpace.org
- Information will be shared with members as he receives response from IRS
- He will be available to assist with updates if needed

Roundtable

- O’Sullivan thanked everyone for attending the meeting. He shared an incident where he assisted a Taxpayer in addressing the IRS on a money order payment
- Lillie stated he assisted a Taxpayer with questions relating to an eviction moratorium that may have possibly been a scam. He provided the Fraud contact information with the Taxpayer
- Daniel Leatham added he received several scam calls
- Lillie stressed awareness to members

Jimerson thanked every member for attending and the comments provided were helpful. Members were reminded to remain safe.

Closing

Jimerson officially closed the meeting.

**Next Meeting: Thursday, May 13, 2021,
12:00 PM EDT**

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