

**Taxpayer Assistance Center Improvements Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Thursday, May 13, 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 |
| • 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 |
| • Kenneth Lewis | New York City, NY | Member |

Staff

- | | |
|----------------------|------------------------------|
| • Terrie English | TAP Director |
| • 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 |

Members of the Public

None

Welcome

Susan Jimerson opened the meeting and welcomed everyone to the call. She shared an overview of the Agenda and a brief introduction of herself and her oversight duties as TAP Manager for TAC. During the meeting, on today, a member will be select to fill the Vice Chair position for TAC. The following Designated Federal Official updates were shared:

- Reminder to visit www.IRS.gov for valuable Tax information or self-help information that would be helpful and provide good Outreach resources
- On a regular basis TAP Staff updates the member website www.TAPSpace.org with information that is very useful for personal and Outreach activities

- Internal Communications Committee (ICC) will have their monthly meeting on May 19, 2021 beginning at 12:00 PM, EDT. They work on the monthly Newsletter, Facebook page and other communications relating to TAP
- The Outreach committee will have their monthly meeting on May 19, 2021 beginning at 2:00 PM, EDT. They discuss outreach programs and is lead by Tross
- May 27, 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 led by TAP Chair Robert Moretti and Vice Chair Nina Tross, who is a member of TAC. Members were encouraged to attend the meeting

National Office Report

Terrie English welcomed members to the meeting.

- May 17, 2021 is the deadline to file Tax returns timely. Members were reminded to visit www.irs.gov for information on timely filing
- The Joint Committee meeting will be May 27, 2021. Members were encouraged to attend
- May 20, 2021 the Focus Group for Underserved Native Americans will have a meeting. The Chairs and Vice Chairs have been asked to participate. Additional TAP members have been added to attend
- Military information has been requested. Members were asked to share any Military background they may have. Whether anyone has served in the Military, retired from or contracted with the Military you may have valuable information to share. Everyone should inform the Analyst of their information to share
- June 17, 2021 TAP Quarterly meeting will be held at 1:00 PM, EDT. Members were encouraged to attend. There will be speakers to help with the TAP program
- Outreach is a big part of the TAP organization. Member Recruitment period is open. Members were asked to share information about TAP with people you meet. It has been extended to June 01, 2021
- Tax Forums are scheduled to be held July 20, 2021 through August 19, 2021. There is a short window to submit interest. The deadline is June 04, 2021 to get the names in
- The Business Card and ID Badges were mailed to members. If anyone did not receive theirs, they should contact the Analyst, O'Sullivan to follow up

Chair Report

O'Sullivan shared some of the Vice Chair responsibilities:

- Act as back up for the Chair
- Sit in on Outreach meetings
- Assure the Activity Reports are received each month
- Attend Chair meetings

The TAP Staff will support the Vice Chair. If there are any questions or concerns, the Staff is available to assist.

Eugene Lillie asked for a volunteer to take on the role as Vice Chair. Charles Simineo volunteered. Lillie motioned and Dan Leatham seconded. The motion was adopted. Congratulations to Simineo, TAC Vice Chair.

Lillie volunteered to be on the Focus Group for Military Individuals. He shared the following:

- Members encouraged to join the group
- Activity Reports are due by the twenty-fifth of each month
- Tax season ends Monday, May 17, 2021
- Members are doing a great job keeping track of time
- Thank you expressed to all for their efforts being put forth

Minutes Approval

April 15, 2021 TAC Minutes were approved as submitted.
Nina Tross moved, and Jessica Wilson seconded

Public Comments

There were no members of the public on the call.

Program Owner

Michael Odom stated:

- There were no open referrals to process at this time.
- One reconsideration request; Issue 40902, Telephone Appointment for Taxpayers is due July 07, 2021
- No implementation dates have been reported for referrals submitted
- No open questions or remarks

Matthew O'Sullivan thanked Odom for the information received.

Screening Committee

Philip George shared the following updates for the Screening Committee:

- Their meeting was held on May 04, 2021. The following were in attendance: Jimerson, Rosalind Matherne, O'Sullivan and George
- The Screening Report was lengthy and was shared in the pre-reads for members
- Individual and Refund issues have been recommended to be dropped
- Other issues not under the scope of TAP were recommended to be dropped
- Issues noted in green were recommended to be dropped or refer to some other area
- Members were encouraged to review the report

George motioned and Lillie seconded
Motion adopted

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

O'Sullivan stated the Screening Report will be posted on www.TAPSpace.org going forward.

Subcommittee Report

Subcommittee 1

George provided the following updates:

- Notes were shared on May 06, 2021 by O'Sullivan
- **Issue #40462**, Innocent Spouse was discussed relative to the potential issues involved. Have Taxpayers submit F8822 with the secondary address was the response from IRS. Subcommittee 1 drafted and approved. Nina Tross thanked the committee for the rebuttal and pushed for reconsideration.

Motion to approve the Project referral document. Tross motioned and George seconded. Motion adopted

Decision: Full Committee consensus approve Project referral document

- The VITA product review has begun. On May 03, 2021 through May 07, 2021 the meetings were held. George mentioned he participated in reviewing the qualification tests. The first revision was completed and more to come
- Simineo and Paula King were involved in the 4012 Review. It was completed. They both agreed it was very productive and time consuming

Subcommittee 2

King provided the following updates:

- Subcommittee 2 reviewed **Issue #401533**, Online Payment Plan
- **Issue #44276**, Review of Tax tips. Members were asked to provide comments to O'Sullivan.

Outreach

- O'Sullivan stressed the importance in getting the Activity Reports sent to the Chair and Vice Chair, a copy to the Analyst, and to TaxpayerAdvocacyPanel@irs.gov Email address

Tross stated

- Share any Outreach in the Outreach Report
- Membership is dropping for possible lack of in person engagement, travel or virtual usage. Members were encouraged to reach out to members within their states and offer their assistance if needed
- Video was sent to members to help reach out to other organizations
- Deadline extended for Recruitment applications to June 01, 2021

- Information was provided by Fred Smith requesting volunteers for the Tax Forum participation. Members were encouraged to submit their names early and not wait until the last minute if interested

Internal Communications Committee (ICC)

O'Sullivan shared the following updates for ICC:

- Newsletter was published on time
- Volunteer needed to submit the article for June
- Format continuation confirmed
- Lillie added he reached out to different Military branches for information.
- Members were encouraged to submit articles to be added in the Newsletter and reminded to submit the articles are due to O'Sullivan by the twenty-fifth of each month
- The structure of the Facebook presence was discussed during the ICC meeting. The appropriateness of some posting is in question

Action Items

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

- Thank you to members for efficiency during meeting
- Congratulate the new Vice Chair and update status on www.TAPSpace.org to show. Inform TAP Staff
- Post approved April 15, 2021 TAC Minutes on www.TAPSpace.org
- Forward rebuttal for **Issue #40902** back to appropriate people at IRS
- Implement the approved recommendations submitted by the Screening Report and notes
- Support Vice Chair

Roundtable

Lillie expressed safety and good health to everyone.

Jimerson expressed congratulations to Simineo for volunteering to be the Vice Chair. Thank you to every member for attending and a productive meeting.

Closing

Jimerson officially closed the meeting.

**Next Meeting: Thursday, June 10, 2021,
12:00 PM EDT**

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