

**Taxpayer Assistance Center Improvements Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Thursday, June 10, 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 |
| • Eugene Lillie | West Deptford, NJ | Chair |
| • Charles Simineo | Cheyenne, WY | Vice Chair |
| • Nina Tross | Apollo Beach, FL | Member |

Member Absent

- | | | |
|------------------|-------------------|--------|
| • Patrice Brown | Brooklyn, NY | Member |
| • Edward Donovan | Cary, NC | Member |
| • Kenneth Lewis | New York City, NY | Member |
| • 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) |
| • Cindy Jones | W&I Service Center |
| • Beth Braddock | W&I Cust Ast Relationship Ed(Care) |

Members of the Public

None

Quorum

Quorum was met.

Welcome

Susan Jimerson opened the meeting and welcomed everyone to the call. Terrie English TAP Director could not be on the call during this meeting. The following Designated Federal Official updates were shared:

- Internal Communications Committee (ICC) will have their monthly meeting on June 16, 2021 beginning at 12:00 PM, EDT. They work on the monthly

Newsletter, the administration for the Facebook page and other communications relating to TAP

- The Outreach committee will have their monthly meeting on June 16, 2021 beginning at 2:00 PM, EDT. TAP Vice Chair, Nina Tross will lead the committee and all Vice Chairs will be in attendance. They discuss outreach programs
- The Quarterly All TAP Members meeting will be held on June 17, 2021 beginning at 1:00 PM, EDT. This meeting is an Administrative meeting and will not be open to the public
- The Recruitment Season has closed. The Interview phase is being arranged. An Email will be shared with members for their participation in the interview process.

Chair Report

Eugene Lillie welcomed everyone to the meeting. The following updates were shared:

- Members were commended on jobs well done and the amount of work being done
- Lillie attended the Subcommittee 2 meeting and will provide feedback to Paula King on the Power Point slides
- Appreciation expressed to Charles Simineo for volunteering to be the Vice Chair
- Members were encouraged to be a part of the Interview process. Participation would inspire the next group of volunteers. Lillie will add his name to the volunteers on today
- Movement on the Child Tax Credit has begun. Some things that were not processed in 2019 that were carried over to 2020 are beginning to show movement within IRS as things begin to open back up
- Members were encouraged to review their Cyber Security policy now that the Tax season is over. IRS has good information available on Publication 4557

Minutes Approval

May 13, 2021 TAC Minutes were approved with correction.

Charles Simineo moved, and Philip George 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
- One reconsideration request; Issue 40902, Telephone Appointment for Taxpayers is due July 31, 2021
- No implementation dates have been reported for referrals submitted

- Answer to question relative to Tax Tips submitted is due on June 14, 2021 to questions or remarks

Screening Committee

Philip George shared the following updates for the Screening Committee:

- Meeting was held on June 01, 2021. The following were in attendance: Kenneth Lewis, Jimerson, Rosalind Matherne, O'Sullivan and George
- The Screening Report was shared with members prior to the call. It was explained how they grouped related issues by color codes
- All the Issues were individual Issues. The Screening Committee recommendation was to drop all the Issues

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**, Stand Still with Transcript and Innocent Spouse is being worked by Subcommittee 1. During the meeting held on June 03, 2021 a briefing on IRS position was shared with the members. The F8857 revision addressing change of address was discussed. A draft of instructions was sent to members. O'Sullivan will share information as it becomes available. Management is aware of the discussions on coordination of tasks and will be working to resolve

George motioned and Nina Tross seconded to close Issue 40462. Motion was adopted

Decision: Full Committee Consensus accept Subcommittee 1 report

- **Issue 44274**, The VITA Product Review George is on both Team 1 and Team 2 to review and revise the VITA certification test. It has been completed and now moves to further review. The second team will be reviewing and revising VITA Publication Guide 4491 and 4012. The Quality Review is scheduled for July 26 through 30, 2021. Lillie, Simineo and Paula King are on both teams.

Subcommittee 2

King provided the following updates:

- **Issue #44276**, Review of Tax Tips is an ongoing project. Subcommittee 2 has a long way to go. They found Issues **40989, 41122, 41475** are all similar. It will be placed on the proper form and the review will be provided once completed. George expressed his desire to rejoin Subcommittee 2. O'Sullivan will send an invite to George

Outreach

Charles Simineo shared the following updates for Outreach:

- Members were advised to be aware of the Fresno Service Center closing
- Not all Activity Reports were received from every member. Simineo will share reminders to members on timely submission
- Simineo along with his LTA attended an Outreach event provided by IRS for regional tax preparers. It was very beneficial. He was one of three members to attend

Internal Communications Committee (ICC)

O'Sullivan shared the following updates for ICC:

- The Newsletter for June is up and running on time
- Volunteers are needed to submit the article for July
- ICC has an ongoing discussion on Facebook presence, change from Facebook group to Facebook page. They are working with management on this issue

Action Items

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

- Post approved May 13, 2021 TAC Minutes on www.TAPSpace.org
- Update the Screening Committee's report in the database
- Close Issue 40462 in SAMS
- Send invite to George for Subcommittee 2
- Follow up with Odom on sharing Tax Tips to members
- Reach out to O'Sullivan for any assistance or information needed

Roundtable

Lillie stated he will send an Email to members for:

- Articles for the Newsletter
- Topics to be added
- Projects being worked
- Any information relative to TAP

George added the interaction from the VITA review team is incredible.

Tross stated TAP Staff to speak with committee members during their meetings would be valuable. She volunteered to complete the Newsletter article for July.

Lillie expressed appreciation to the TAP Staff for all the assistance provided.

Jimerson expressed thank you to every member for attending their participation and a reminder to submit all Activity reports. It is not too late to turn them in. The information from the reports goes into the Annual Report and is a part of what justifies funding for the TAP program.

Closing

Jimerson officially closed the meeting.

**Next Meeting: Thursday, July 08, 2021,
12:00 PM EDT**

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