

**Taxpayer Assistance Center Improvements Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Thursday, July 08, 2021**

Designated Federal Officer

- Susan Jimerson TAP West Chief

Attendance

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| • 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 |
| • 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

Staff

- | | |
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| • Terrie English | TAP Director |
| • Matthew O’Sullivan | TAP Program Analyst |
| • Rosalind Matherne | TAP Program Analyst |
| • Conchata Holloway | TAP Program Analyst |
| • Kudiratu Usman | |
| • 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 updates were shared:

- Internal Communications Committee (ICC) will have their monthly meeting on July 21, 2021 beginning at 12:00 PM, EDT

- The Outreach committee will have their monthly meeting on July 21, 2021 beginning at 2:00 PM, EDT
- The Joint Committee will have their monthly meeting on July 22, 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

National Office Report

Terrie English welcomed everyone on the call. The following information for the National Office report was shared:

- An Email invite was sent to members for the Military Focus group meeting on July 15, 2021 beginning at 12:00 PM, EDT. Members were encouraged to attend the meeting especially if any member has experience in this area. They will be asking TAP to do a focus study on the homeless communities. Members with experience and or knowledge of anyone who has worked with the homeless communities to share their input. Additional information will be coming forth and will be shared with members as it becomes available
- The July Tax Forums sign up participation should have been completed and ready to go forward. There will be thirty live streaming webinars available during the Tax Forums. Members with CPAs credit for classes need to be aware. Tross added the credits are for everyone
- Thank you and appreciation was expressed to members who have and will be participating in the TAP Interview process for the 2022 TAP year
- The Joint Committee Planning Session will be held during the week August 23, 2021. The Chairs and Vice Chairs will discuss improvements to the TAP program. Members were encouraged to submit ideas to their Analyst or the Chair to bring to the meeting
- Reminder to view the Annual Report to Congress. There is a lot of interesting information to review and learn about
- The Child Tax Credit will be starting on July 15, 2021. Information is available on www.IRS.gov

Chair Report

Eugene Lillie thanked everyone for their attendance, all the work being done, the long hours put in and the sacrifices being made. Appreciation to the TAP Staff for their support as well. The following information was shared:

- The importance of doubling down on Outreach within the next four to six weeks for topic to discuss
- Members who are actively preparing Tax Returns were encouraged to listen to their clients, see what their complaints/problems

- Software being used to identify information being supplied will be a topic of discussion
- Reminder to do

Minutes Approval

June 10, 2021 TAC Minutes were approved with correction.
Charles Simineo moved, and Tross 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 on or before July 31, 2021**
- No implementation dates have been reported for referrals submitted
- Answer to question relative to VITA Project Review is anticipated back on today or tomorrow
- Questions for the YouTube video of the Power point and are played in a TAC capability, how their streams are available in TAC offices and are there other languages other than Spanish

Screening Committee

Philip George shared the following updates for the Screening Committee:

- Meeting was held on July 06, 2021. George, Kenneth Lewis, Jimerson, Rosalind Matherne and Matthew O'Sullivan attended the call
- The Screening Report with their recommendations was shared with members in the Pre-reads. It was explained how they grouped related issues using a color-coded system
- Many of the Issues were individual Issues. The Screening Committee recommendation was to drop all the Issues as being outside of the scope of TAP
- A group of old Parking Lot issues were screened. Many were recommended to be dropped. Others have additional actions

George motioned and Tross seconded

Decision: Full Committee Consensus to accept the Screening Committee's Report as submitted.

Subcommittee Report

Subcommittee 1

Lillie reminded members volunteers are needed to assist with TAP interviews.

- **Issue 44274**, The VITA Product Review will be an ongoing project and is still being worked
- **Issue 44436**, Oil and Gas Royalties has been written up. O'Sullivan added a draft was sent to members and will be posted on www.TAPSpace.org later today
- Matherne provided information on IRS hiring additional employees to man the telephones
- Discussions were held on the Parking Lot issues. Some of them are being dropped, reviewed or picked up for referrals
- Articles were received for the July Newsletter and published. Volunteers are needed to write next month articles
- Matherne shared information on what the TFPL Committee is working a new referral for Where is my Refund to cut down on call volume and wait time
- Members were encouraged to submit their ideas and suggestions

Subcommittee 2

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

- **Issue #44276**, Review of Tax Tips still has a long way to go. Questions have been submitted to IRS. Subcommittee 2 is waiting for IRS to answer
- **Issues 40989, 41122, 41475** concern availability of IRS Assistance, Subcommittee 2 is working to get the form completed. Report out during next month's Full Committee meeting
- Comments and suggestions are welcomed

Outreach

Charles Simineo shared the following updates:

- Outreach committee met and had lengthy discussions on the Activity Reports
- Not all Activity Reports were received. Simineo did follow up with members who needed to submit their reports
- Discussions were held on the Survey about the topics to be included on the www.IRS.gov website. Simineo was unsuccessful in completing the Survey. Members were asked if anyone had similar issues
- They discussed the interaction with the LTAs. Response to this was requested by Terrie English
- Members were reminded when speaking with family, friends or colleagues if you mention TAP it is considered as Outreach
- Tross added to continue submitting the Activity Reports on time and the reports are accurately reflecting time, who you are talking to and what is being said
- English confirmed members should notify the Analyst with information if anyone is having any difficulties with their LTAs

Internal Communications Committee (ICC)

Kenneth Lewis shared the following updates for ICC:

- Ongoing discussions on the transition from a Facebook group to a Facebook page. TAP Staff will work with ICC members to help implement
- O'Sullivan added the TAPSpace User Guide is being worked on
- The Newsletter was released on time
- The Newsletter for June is up and running on time and all articles received
- Volunteers are needed to submit the article for July, August and September. Lillie will be reaching out to members for follow up

Action Items

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

- Post approved June 10, 2021 TAC Minutes on www.TAPSpace.org
- Post Draft on Oil Gas Royalty referral and send Link to members
- Update the Screening Committee's report in the database and transfer the Issues that needs to be transferred and complete the additional research needed
- Reach out to IRS personnel on some of the research
- Follow up and share information as it become available with members from Odom. O'Sullivan is available for any questions and or concerns

Roundtable

Lillie opened the discussion for the Roundtable:

- Tross asked if Issue 41297, Notice Deficiency on Transcripts would it be pursued. O'Sullivan will follow through on the needed research
- O'Sullivan will follow up with IRS, SA for SME to come and speak with the Committee Topics to be added
- Simineo spoke on the Screening Report issues should be looking at the systemic issue and adding a reason for pending status may decrease calls. A suggestion to write a stand along referral was made and forward to Subcommittee 1 to work

Jimerson expressed thank you to every member for attending their participation. Thank you to Michael Odom.

Closing

Jimerson officially closed the meeting.

**Next Meeting: Thursday, August 12, 2021,
12:00 PM EDT**

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