

**Taxpayer Assistance Center Improvements Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Thursday, September 9, 2021**

**Designated Federal Officer**

- Susan Jimerson TAP West Chief

**Attendance**

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| <ul style="list-style-type: none"> <li>• Philip George</li> <li>• Paula King</li> <li>• Kenneth Lewis</li> <li>• Eugene Lillie</li> <li>• Charles Simineo</li> <li>• Nina Tross</li> </ul> | <p>Saint George, UT<br/>Lexington, KY<br/>New York City, NY<br/>West Deptford, NJ<br/>Cheyenne, WY<br/>Apollo Beach, FL</p> | <p>Member<br/>Member<br/>Member<br/>Chair<br/>Vice Chair<br/>Member</p> |
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**Member Absent**

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| <ul style="list-style-type: none"> <li>• Patrice Brown</li> <li>• Edward Donovan</li> <li>• Daniel Leatham</li> <li>• Jessica Wilson</li> </ul> | <p>Brooklyn, NY<br/>Cary, NC<br/>Shrewsbury, MA<br/>Byram, MS</p> | <p>Member<br/>Member<br/>Member<br/>Member</p> |
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**Visitig Member**

- Robert Moretti Great Falls, MT TAP Chair

**Staff**

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| <ul style="list-style-type: none"> <li>• Matthew O'Sullivan</li> <li>• Rosalind Matherne</li> <li>• Conchata Holloway</li> <li>• Annie Gold</li> <li>• James Bellinger</li> </ul> | <p>TAP Program Analyst<br/>TAP Program Analyst<br/>TAP Program Analyst<br/>TAP Administrative Assistant<br/>Wage &amp; Investment (W&amp;I)</p> |
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**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 was provided. Terrie English could not be on the call today. The following Designated Federal Official and National Office updates were shared:

- Recruitment for New Members and Alternates for TAP year 2022 is going forward. The Recruitment package is in the approval phase. The package

- is put together and forwarded on to the TAP Director, the Executive of CSO, The National Taxpayer Advocate, IRS and the final stop will be with Treasury. The finalizations of the background checks and Tax Compliance checks are moving forward
- The Joint Committee Annual Planning Session was held in August. They had discussions on the 2022 TAP year outlook, how to improve the processes, and look at some of the challenges continuing virtual work. Ken Corbin, Chief Taxpayer Experience attended and shared how IRS is going forward making improvements and provided insight on some of the challenges they are experiencing during the pandemic. He answered questions provided by the Chairs. More information will be shared in the Chair Report
  - TAP Chair and Vice Chair elections will be held in mid-October. There will be an informational session on the roles of the National TAP Chair and Vice Chair. Members will obtain information on what it is like being in leadership roles at the National level representing TAP. More information will be shared. Members were encouraged if interested in the positions to share with Matthew O'Sullivan
  - TAP 2021 Annual Report Committee will take the reports from each of the Chairs, ICC and the Vice Chairs on the activities during 2021 to be added in the Annual Report together. This committee has a process to report out on all of the work of the TAP members available to the public
  - TAP year end is approaching with the last day on November 30, 2021. Members were encouraged to continue working on projects. The last Joint Committee meeting will be November 18, 2021. There is one final month to complete projects to forward to the Joint Committee prior to their last meeting of the year
  - Internal Communications Committee (ICC) will have their monthly meeting on September 15, 2021 beginning at 12:00 PM, EDT
  - The Outreach committee will have their monthly meeting on September 15, 2021 beginning at 2:00 PM, EDT
  - The Joint Committee will have their monthly meeting on September 23, 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

### **Chair Report**

Eugene Lillie thanked members and Robert Moretti for attending the call and shared the following Chair Report:

- Members were encouraged to be as detailed as possible when submitting Outreach information on the Activity Reports and maintain weekly contact with LTAs for possible meetings to conduct Outreach.
- Members also encouraged to contact press releases on topics or events to participate in
- Members who participated in the VITA Review process were asked to share their experiences and outcome with Matthew O'Sullivan

- Members who may have missed attending a Full Committee meeting were asked to go back and review the Minutes from those meetings
- The nominations and election of officers is approaching. Members were encouraged to consider nominating a member or self-nominate for a position
- There will be follow ups conducted on members who have not been attending meetings. Questions or concerns should be sent to Lillie, Jimerson or O'Sullivan

### **Minutes Approval**

August 12, 2021 TAC Minutes were approved as submitted.  
Nina Tross moved, and Charles Simineo seconded

### **Public Comments**

There were no members of the public on the call.

### **Program Owner**

James Bellinger stated the IRS appreciates the work being done by the members of TAP. There were no updates to report.

### **Screening Committee**

Philip George shared the following updates for the Screening Committee:

- Meeting was held on September 07, 2021
- O'Sullivan sent a copy of the Screening Report along with a Link where members could review
- **Issue #49686**, Signage and Identification of TAC offices, the committee is considering requesting additional information be placed on [www.irs.gov](http://www.irs.gov). The issue will be kept active
- **Issue #40989** and **#41475** the recommendation is to close and associate with **Issue #41122**
- Recommend the Issue on multiple year refunds under Where is my Refund tool, IRS cannot implement. This Issue is dropped
- Three Issues with the recommendation of no action be taken:  
**Issue #40902**, Telephone Appointments waiting for information from IRS  
**Issue #44436**, Gas and Royalty Training, the referral has been drafted and included in the pre-reads  
**Issue #44274**, VITA Project Review
- O'Sullivan added once the reply from the Attorney Advisor is received, he will share with the committee members

**George motioned, and Paula King seconded**

**Decision: Full Committee Consensus to accept the Screening Report as submitted,**

## **Subcommittee Report**

### Subcommittee 1

George stated Subcommittee 1 had their meeting on September 02, 2021.

Discussions were held on the following:

- **Issue #44436**, Oil and Gas Training referral additional changes were made and waiting for IRS response
- **Issue #44274**, The VITA Product Review Subcommittee 1 will document participation for the TAP end report
- **Issue #41533**, Online Payment Plans Subcommittee will do additional research for guidance

### Subcommittee 2

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

- **Issue #41122**, Accessibility to TAC Office, the response was received and shared in the pre-reads. The referral requesting accessibility be added permanently. Subcommittee 2 recommends this issue be forwarded to the Joint Committee. King will attend the Joint Committee's scheduled meeting on September 23, 2021 to present the Issue

**King motioned and Nina Tross seconded**

**Decision: Full Committee Consensus to forward Issue #41122 to the Joint Committee for approval**

- **Issue #44276**, Review of Tax Tips O'Sullivan waiting for members to submit their notes prior to forwarding for review. Members were reminded to submit the information to move forward. Subcommittee will present to the Full Committee during next month's meeting

## **Outreach**

Charles Simineo shared the following update for Outreach

- He met with Tross and the discussion focus was on the Activity reports
- There have been two missing reports each month
- Members encouraged to provide information from the VITA Project Review participation. It is an important part of Outreach
- Members were encouraged to be specific on what is being reported on the reports for Outreach
- Discussions were held on what members will be able to do once they have reached the end of their term with TAP

## **Internal Communications Committee (ICC)**

Kenneth Lewis shared the following updates for ICC:

- Meeting was held on August 18, 2021
- Continued discussion on the transition of TAP presence from the Facebook group to the Facebook page
- An Email was sent to TAP members with the link to the Facebook page. The Facebook group will close at the end of September
- Members were encouraged to submit interest in being a volunteer administrator for the Facebook page to ICC and O'Sullivan

- ICC is working on project **48806**, Reviewing and Editing the TAP member TAPSpace Guide. Comments, suggestions or edits forward to ICC and O'Sullivan
- Social Media presence is being seen. Members were encouraged to view and provide any comments and or suggestions to the members of ICC

### **Action Items**

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

- Post approved August 12, 2021 TAC Minutes on [www.TAPSpace.org](http://www.TAPSpace.org)
- Update the system with the approved Screening Report information
- Update SAMS with the referral voted through. Alert Gilbert Martinez and share the final copy with the committee
- Monitor the responses from IRS on the Oil and Gas Issue
- Correct the Subcommittee notes to show George was present during their meeting

### **Roundtable**

Lillie thanked members for attendance and participation.

Robert Moretti shared information on the Election process:

- A message will be shared with members on the date and time
- Members interested in becoming a Chair or Vice Chair were encouraged to consider nominating themselves or another member and share their interest with O'Sullivan for follow up
- There will be an email with the Link will be sent allowing members to place their vote
- Time and availability stressed as the most important attributes for being a Chair or Vice Chair, attend as many meetings as possible
- Information will be coming forth for a forum working group on homeless Taxpayers. Members were encouraged to attend
- Simineo shared there is an informational meeting held monthly for Tax preparers. He will share the information to O'Sullivan to share with the committee

Jimerson expressed thank you and appreciation to members for getting the referral completed and all the work being done. Great discussion on today. Moretti and Bellinger, thank you for being on the call. If there are any questions or comments, forward to O'Sullivan or Jimerson.

### **Closing**

Jimerson officially closed the meeting.

**Next Meeting: Thursday, October 14, 2021,  
12:00 PM EDT**

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