

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

Designated Federal Officer

- Susan Jimerson TAP West Chief

Attendance

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| <ul style="list-style-type: none"> • Philip George • Paula King • Daniel Leatham • Kenneth Lewis • Eugene Lillie • Nina Tross | <ul style="list-style-type: none"> Saint George, UT Lexington, KY Shrewsbury, MA New York City, NY West Deptford, NJ Apollo Beach, FL | <ul style="list-style-type: none"> Member Member Member Member Chair Member |
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Member Absent

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| <ul style="list-style-type: none"> • Edward Donovan • Charles Simineo • Jessica Wilson | <ul style="list-style-type: none"> Cary, NC Cheyenne, WY Byram, MS | <ul style="list-style-type: none"> Member Vice Chair Member |
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Guest Member

- Robert Moretti Great Falls, MT TAP Chair

Staff

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| <ul style="list-style-type: none"> • Terrie English • Rosalind Matherne • Conchata Holloway • Kurdiratu Usman • Annie Gold • James Bellinger • Tamikio Bohler | <ul style="list-style-type: none"> TAP Director TAP Program Analyst TAP Program Analyst TAP Program Analyst TAP Administrative Assistant Wage & Investment (W&I) Wage & Investment (W&I) |
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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 and the following Designated Federal Official updates were shared:

- Appreciation and thank expressed to members for their participation and hard work
- November 17, 2021 Internal Communications Committee will have their final meeting for the year beginning at 12:00PM, EDT
- November 17, 2021 Outreach Committee will have their meeting at 2:00PM, EDT

National Office Report

Terrie English shared the following National Office updates:

- Appreciation and thank you expressed to members for the hard work, ideas brought forward and accomplishments through the year
- November 19, 2021 TAP Graduation Ceremony will be held at 1:00 PM, EDT. Members were encouraged to attend in support of the members retiring from TAP. Comments and remarks to be shared for members are encouraged. Send all remarks to the Analyst
- November 18, 2021 the Joint Committee will have their meeting at 1:30 PM, EDT. Member are encouraged to attend. Time spent attending the meeting should be counted on the Activity Report to be added as credit to the number of hours reported.
- Appreciation and thank you to the IRS staff, who has partnered with TAP

Chair Report

Eugene Lillie shared the following Chair Report:

- Thank you expressed to Robert Moretti for his guidance and counseling. He is one of TAP's third year members and will be greatly missed
- Members were reminded to continue to submit their Activity Reports and continue adding details to the reports. Encouragement shared on how Outreach can be done in different ways. Lillie and his LTA are setting up meetings with homeless vendor groups, shelters, food kitchens and joint presentations. Members were encouraged to stay in contact with their LTAs

Minutes Approval

October 14, 2021 TAC Minutes were approved as submitted.
Philip George moved, and Paula King seconded

Public Comments

There were no members of the public on the call.

Program Owner

James Bellinger expressed appreciation and thank you to members for the hard work they have done. He is looking forward to working with TAP next year.

Screening Committee

Philip George shared the following updates for the Screening Committee:

- Meeting was held on October 26, 2021. They reviewed three Issues on individual accounts asking for refunds, IRS processes and comments to institute a fair tax. The recommendation from the Screening Committee was to drop all these issue.

Lille motioned and Nina Tross seconded

Decision: No Objections, Full Committee accepted the Screening Report as submitted

Subcommittee Report

Subcommittee 1

George shared Subcommittee 1 report on the following:

- Subcommittee 1 meeting was held November 4, 2021
- **Issue #44274**, The VITA Product Review discussions were held. Matthew O’Sullivan stated Lillie will incorporate notes into his report for the TAP Annual Report
- **Issue #44436**, Oil and Gas Royalty Training. O’Sullivan stated the Issue has been approved by the Joint Committee and forwarded to IRS. A response is anticipated next year

Subcommittee 2

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

- Subcommittee 2 had a brief meeting on last week
- **Issue #44276**, Review of Tax Tips was approved by the Joint Committee. Subcommittee 2 is waiting for a response from IRS on this Issue and another issue that is anticipated next year
- King and Charles Simineo were the presenters at the Joint Committee meeting. Lillie expressed thank you for a outstanding job

Outreach

O’Sullivan shared the following Outreach Committee updates:

- Members were encouraged to make sure their Activity reports were updated for proper credit of activities performed
- Returning members encouraged to continue tracking hours and maintain records of activities
- Thank you express for the efforts to conduct Outreach
- Lillie added if there are questions, reach out to O’Sullivan and members may call him

Internal Communications Committee (ICC)

Kenneth Lewis shared the following updates for ICC:

- ICC discussed updating the TAPSpace Member Guide during their last meeting. Final feedback was incorporated. The issue will be forwarded through the process for final approval.

- Option for the TAP Annual Report were also discuss during the last meeting. ICC reviewed three choices of what the cover would look like and discussed the issue
- Discussions were held on transition from the Facebook group to a Facebook page. The Facebook group has been archived. Members were encouraged to submit interest in becoming an administrator for the Facebook page to Christine Scott or O'Sullivan
- O'Sullivan added the artwork for the version decided upon. Contact was received from IRS and will be shared with members for next week's ICC meeting

Action Items

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

- Post approved October 14, 2021 TAC Minutes on www.TAPSpace.org
- Close the Issues on SAMs per the Screening Report
- Thank you to members for working together and TAP staff for assisting

Roundtable

- Moretti reminded members today is the last day to submit ballots voting for TAP 2022 Chair and Vice Chair
- Lillie mentioned the need for a volunteer to write the Newsletter article for the month. Daniel Leatham volunteered to do the writeup
- O'Sullivan commended members for working together and getting the work done. TAP Staff is available to assist

Jimerson expressed thank you and appreciation to members for hours working on issues, performing the Outreach activities and all behind the scenes work being conducted. Members encouraged to safe and happy holiday.

Reminder, the Graduation Ceremony will be held on November 19, 2021

English thanked the members for their service.

Closing

Jimerson officially closed the meeting.

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