

**Taxpayer Assistance Center Improvements Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Tuesday, May 12, 2022**

**Designated Federal Officer**

- Susan Jimerson TAP West Chief

**Attendance**

- |                      |                    |            |
|----------------------|--------------------|------------|
| • Philip George      | Saint George, UT   | Member     |
| • Anthony Jackson Jr | New Orleans, LA    | Member     |
| • Paula King         | Lexington, KY      | Member     |
| • Daniel Leatham     | Shrewsbury, MA     | Member     |
| • Conner McFarland   | Augusta, ME        | Member     |
| • David Newingham    | Henderson, NV      | Member     |
| • Omar Roman         | Farmers Branch, TX | Member     |
| • Charlie Simineo    | Cheyenne, WY       | Vice Chair |
| • Nina Tross         | Apollo Beach, FL   | Chair      |

**Member Absent**

- |                    |                   |        |
|--------------------|-------------------|--------|
| • Sarah Holtzclaw  | Pleasanton, GA    | Member |
| • Danielle Roberts | Charlotte, NC     | Member |
| • Suzanne Trnka    | Detroit Lakes, MN | Member |

**Guest Member**

- Martha Lewis National Office TAP Chair

**Staff**

- |                      |                              |
|----------------------|------------------------------|
| • Terrie English     | TAP Director                 |
| • 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)      |
| • Tamiko Bohler      | Wage & Investment (W&I)      |
| • Shenita Thornton   | IRS                          |
| • Leslie Henley      | IRS                          |

**Members of the Public**

None

**Quorum**

Quorum was met.

### **Welcome and DFO Report**

Susan Jimerson opened the meeting and welcomed everyone to the call. An overview of the agenda was provided and the following DFO Report:

- Members were encouraged to reach out to Matthew O'Sullivan or Jimerson with any questions or concerns
- May 18, 2022, the Ad Hoc Committee for the TAP Chairs will meet at 2:30PM EDT. This meeting will include Martha Lewis the National TAP Chair, the Chairs of the project committees and ICC
- May 19, 2022 beginning at 12:00PM, EDT the Outreach Committee will have their meeting. National TAP Vice Chair, Dr. Eugene Lillie is the lead on this committee. The project committees' Vice Chairs will be in attendance
- May 25, 2022, beginning at 12:00PM, EDT the Internal Communications Committee (ICC) will have their scheduled monthly meeting. The ICC works on the Facebook presence, monthly newsletter, and other internal and external communications projects
- May 26, 2022, the beginning at 1:30PM, EDT Joint Committee will have their monthly meeting. The committee is led by the National TAP Chair, Martha Lewis and attended by the Chairs. Members were encouraged to attend to get a clear overview of what goes on during the meetings. This meeting is opened to the public. Members were encouraged to reach out to O'Sullivan for the meeting information
- May 30, 2022, TAP office will be officially closed in recognition of Memorial Day

### **National Office**

Terrie English welcomed members to the call and provided the following National Office updates:

- IRS Tax Forums are scheduled to begin on July 19, 2022 and run through August 18, 2022. This is a form of Outreach. The Analyst will be reaching out to members to see if anyone would be interested in volunteering to man the virtual Tax booths. There will be training on working the booths.
- TAP 2023 Interview process has begun. Applicants have all gotten their applications completed. The application process takes time. Members will be receiving an email invite to volunteer in assisting with the interviews. Members were encouraged to participate and take advantage of the opportunity to find out what happens in the process. Information obtained would help in explaining to anyone interested in being a part of TAP
- Analysts will be reaching out to members needing business cards. The cards will be ordered for new members and returning members who may need additional cards by the end of the week
- ID Name Badges will be ordered for all new members
- IRS employees will be migrated back into the office by the end of June
- June 13, 2022, beginning at 1:30PM, EDT the TAP first quarterly meeting will be held. The National Taxpayer Advocate, Erin Collins will be

speaking during the meeting. More information will be shared closer to the date

### **Chair Report**

Nina Tross welcomed members to the call.

- Thank you to Charlie Simineo for covering during the Joint Committee's meeting. Members were encouraged to sit in on the meetings for information on what the committees are doing
- Some of the TAC offices are opened on Saturdays from 9:00AM to 4:00PM. Pay special attention to your time zones. Members were encouraged to visit [www.irs.gov](http://www.irs.gov) for specific TAC offices availability
- Tross participated in an Outreach event. She did a presentation on TAP and received three new issues; Access to Federal buildings, ITIN verses Social Security numbers and the third issue was sent to her email. She will share with members
- Members were encouraged to share information on the TAP application process
- Congratulations to Omar Roman for his election to the Office of Public Counsel

### **Minutes Approval**

TAC April 14, 2022 TAC Minutes were approved as submitted.  
Paula King moved and Charlie Simineo seconded

### **Public Comment**

N/A

### **Program Owner's Report**

Michael Odom shared the following:

- W&I currently there are no open referrals
- There is one reconsideration **Issue 41122**, Accessibility to TAC due December 1, 2022
- No recommendation checks
- There were two briefings on last week. One by Tina Younger on Primitive Items of communications and the other one by Terrell Davis on VITA TC Training Materials Provisions on Understanding Taxes. Odom anticipates good referrals to come
- There were two SME requests: **Issue 44436** and **Issue 44276**
- O'Sullivan requested assistance from Odom on **Issue 40310**, Getting Transcripts online. Odom will follow up and get back with him

## **Subcommittee Report**

### Subcommittee 1

Philip George shared the following updates for Subcommittee 1:

- The subcommittee met on May 5, 2022
- The SMEs gave good presentations on the TAC offices signage issue and on the VITA Product Review project.
- During the meeting discussions were held on IRS response to the Oil and Gas Royalties becoming a part of VITA. Subcommittee 1 decided to hold their decisions until next month's meeting

### Subcommittee 2

Paula King stated Subcommittee 2 had their meeting on April 7, 2022.

- Subcommittee 2 had presentations done by IRS that was very informative
- Update presentation was given on Issue 44276, Reviewing Tax Tips presented in the TAC. The subcommittee will wait for information to come back before they decide to close the issue
- Members of the subcommittee plan to volunteer for the Revision Understanding Taxes and VITA documents

## **Outreach**

Charlie Simineo stated the Outreach Committee met and discussed:

- The use of the Activity Reports on [www.TAPSpace.org](http://www.TAPSpace.org)
- Established what they would be looking at

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

Matthew O'Sullivan shared the following updates for ICC:

- The April Newsletter was sent out on time
- Members were reminded, a volunteer is needed to submit the next article. It is due by the twenty-fifth of the month. It was suggested that a different member would submit the article each month. The format is Arial 10 when submitting articles.
- Conner McFarland volunteered to do the article for June

## **Screening Committee**

O'Sullivan informed the Full Committee:

- The new issue report was pulled for the Screening Committee
- Invites have been sent to the committee members for their scheduled meeting on May 17, 2022
- There are a lot of issues in the report. The Screening Committee will filter through the issues at the beginning of the year.

## **Action Items**

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

- Follow up with Odom on information
- Add Danielle Roberts integrated into the committee and assigned to Subcommittee 1

- A volunteer was asked to be on the Quality Review team. Currently the members are Anthony Jackson, Jr., Daniel Leatham, David Newingham and Omar Roman. Daniel Leatham volunteered
- Forward approved April 14, 2022, TAC Minutes to Kevin Brown to post and post on [www.TAPSpace.org](http://www.TAPSpace.org)

### **Roundtable**

Tross asked for any comments, suggestions, or questions:

- TAP Chair, Martha Lewis thanked members for sitting in on the meeting and she will be looking forward to working with the committee,

Jimerson thanked everyone for being on the call.

- Members were encouraged to reach out to O'Sullivan if they are having issues with signing onto [www.TAPSpace.org](http://www.TAPSpace.org)
- Danielle Roberts will be assigned a mentor

### **Closing**

Jimerson officially closed the meeting.

**Next Meeting: Thursday, June 09, 2022  
3:00 PM EDT, 2:00 PM CDT, 1:00 PM MDT, 12:00 PM PDT**

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