

**Taxpayer Assistance Center Improvements Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Thursday, November 10, 2022**

**Designated Federal Officer**

- Susan Jimerson                      TAP West Chief

**Attendance**

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| <ul style="list-style-type: none"> <li>• Denise Andrews</li> <li>• Philip George</li> <li>• Sarah Holtzclaw</li> <li>• Paula King</li> <li>• Daniel Leatham</li> <li>• David Newingham</li> <li>• Charlie Simineo</li> <li>• Nina Tross</li> </ul> | <ul style="list-style-type: none"> <li>Katy, TX</li> <li>Saint George, UT</li> <li>Pleasanton, GA</li> <li>Lexington, KY</li> <li>Shrewsbury, MA</li> <li>Henderson, NV</li> <li>Cheyenne, WY</li> <li>Apollo Beach, FL</li> </ul> | <ul style="list-style-type: none"> <li>Member</li> <li>Member</li> <li>Member</li> <li>Member</li> <li>Member</li> <li>Member</li> <li>Vice Chair</li> <li>Chair</li> </ul> |
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**Member Absent**

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| <ul style="list-style-type: none"> <li>• Mikaela Binsfeld</li> <li>• Anthony Jackson Jr</li> <li>• Conner McFarland</li> <li>• Danielle Roberts</li> </ul> | <ul style="list-style-type: none"> <li>Saint Paul, MN</li> <li>New Orleans, LA</li> <li>Augusta, ME</li> <li>Charlotte, NC</li> </ul> | <ul style="list-style-type: none"> <li>Member</li> <li>Member</li> <li>Member</li> <li>Member</li> </ul> |
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**Visiting Member**

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| <ul style="list-style-type: none"> <li>• Martha Lewis</li> <li>• Eugene Lillie</li> </ul> | <ul style="list-style-type: none"> <li>National Office</li> <li>National Office</li> </ul> | <ul style="list-style-type: none"> <li>TAP Chair</li> <li>TAP Vice Chair</li> </ul> |
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**Staff**

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| <ul style="list-style-type: none"> <li>• Terrie English</li> <li>• Rosalind Matherne</li> <li>• Annie Gold</li> </ul> | <ul style="list-style-type: none"> <li>TAP Director</li> <li>TAP Program Analyst</li> <li>TAP Administrative Assistant</li> </ul> |
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**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:

- The Email request for members to submit their committee preference is due by November 18, 2022. If there is no response, committee assignment will be where there is a program need
- Members were encouraged to consider being a mentor for the new members coming on board. Additional information will be shared by Rosalind Matherne on the mentoring program and training will be provided
- Thank you expressed to all Veterans on the call for their service. November 11, 2022, is Veterans Day the TAP office will be closed
- November 15, 2022, ICC will have their final meeting for the year beginning at 12:00 PM, EDT
- November 16, 2022, the last Ad Hoc Chair meeting begins at 2:30 PM, EDT
- November 17, 2022, the last Outreach meeting begins at 12:00 PM, EDT
- November 17, 2022, The Joint Committee will have their final meeting for the year beginning at 1:30 PM, EDT
- November 18, 2022, TAP 2022 Member Graduation Ceremony begins at 12:00 PM, EDT
- Congratulations to Nina Tross and Paula King for dedicating three years to promote improving customer service. Members were encouraged to attend the graduation ceremony

### **National Office**

Terrie English welcomed everyone to the last meeting for this year and shared the following information:

- Appreciation was expressed to members for all the hard work they have done
- IRS is hiring. A flyer was emailed to members to share with anyone they may know who may be interested in a full or part time position with IRS
- Returning members were encouraged to continue to do Outreach through December and January.

### **Chair Report**

Nina Tross shared the following:

- Thank you and appreciation expressed to members during the year
- Thank you to the subcommittee for all the work they performed
- Appreciation extended to the members and Matthew O'Sullivan who worked on the Screening Report
- Thank you to Paula King for taking on Subcommittee 2 and submitting the last Newsletter article for the year

### **Minutes Approval**

Members were asked to read over the September 08, 2022, and October 13, 2022, minutes.

**Charlie Simineo motioned, and Sarah Holtzclaw seconded**

**Decision: Full Committee Consensus approved both September 8 and October 13, 2022, minutes as submitted**

### **Public Comment**

N/A

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

James Bellinger could not attend today's call.

### **Subcommittee Report**

Subcommittee 1

Philip George stated Subcommittee 1 had one item to ask the Committee's vote to elevate to the Joint Committee for Issue #54682, Unprohibited Items.

**George motioned and Daniel Leatham seconded**

**Decision: Full Committee Consensus elevate Issue #54682 to the Joint Committee**

Subcommittee 2

Paula King thanked members who worked on Issue #55988, Allow People to Fill Out a Form Stating Their Issue. IRS does have a policy relating to this issue but not completely. This issue is a work in progress and will be moved to next year to work.

### **Screening Committee**

Tross stated the Screening Report is located on [www.TAPSpace.org](http://www.TAPSpace.org) for viewing. The report was put together by Conner McFarland and Paula King assisted him.

**King motioned and Simineo seconded**

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

### **Outreach**

Eugene Lillie shared the following information for Outreach:

- Members were encouraged to continue doing Outreach
- Lillie has two Outreach events scheduled. One will be held in November and the other in December. He will be taking pictures and recording it in the Activity Report
- Members were encouraged again to continue logging hours into their Activity Reports
- Newingham will be attending a seminar in December 14 and 15 in Las Vegas. Lillie will attend also
- Anthony Jackson will represent TAP in New Orleans in November. The LTA will be attending as well. TAP Speak Up Brochures were requested to be sent to Jackson for the event
- Two TAC members are graduating with the most experience. Encouragement and appreciation were expressed to both King and Tross

- Outreach, Outreach, Outreach and Activity Reports, Activity Reports, Activity Reports were stressed
- Tross advised members to go onto [www.TAPSpace.org](http://www.TAPSpace.org) and get the Activity Reports current if they have not already done so

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

Holtzclaw shared the following:

- Thank you to King who has volunteered to complete the Newsletter article for this month
- The Newsletter for this month went out on last week leaving one more until March of 2023
- The template has made completing the articles very easy and will be continued during next year

### **Action Items**

Matherne stated she will complete the following action items:

- Post and forward to Kevin Brown the final approved minutes for September 08 and October 13, 2022
- Elevate Issue #54682, Prohibited Items to O'Sullivan to go on the Joint Committee's Agenda next week
- Tross added Charlie Simineo will fill in at the Joint Committee's meeting next week in her absence
- Jimerson added Issue #55988 will be place in the Parking Lot
- Close out the issues on the Screening Report

### **Roundtable**

Tross asked for comments

- King thanked everyone and informed the Committee she will continue to advocate past her exiting the TAP
- Tross encouraged members to make TAP a priority and continue to do Outreach
- TAP is still waiting for the approval of the New Members for next year, members were advised to be on the look-out for that information
- English shared appreciation and thank you to Nina Tross for all she has done and served as the Vice Chair last year on to Chair this year
- Matherne added thank you to Tross
- Martha Lewis thanked the Committee for their work and support. It has been a pleasure working with everyone. She reminded members to send any Issues to the Joint Committee by Monday. Tuesday will be too late to get on their Agenda
- Simineo thanked Tross and Lewis for their leadership
- Lillie thanked IRS Staff for all they do last year, this year and will continue doing next year
- Tross shared a final well wish for the members to meet face to face and get more members involved

Jimerson expressed appreciation to Tross for being task orientated. She has always been dependable to get things done. King was thanked and appreciated for being willing to always volunteer. To all the TAP members, Jimerson expressed appreciation and thank you to each member for all the work they do and sharing ideas.

Have a wonderful Veterans' Day and Happy Thanksgiving!

**Closing**

Jimerson officially closed the meeting at 3:39 PM, EDT.

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