



**Taxpayer Assistance Center Improvements Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, November 10, 2020**

Designated Federal Officer

- Susan Jimerson Chief, TAP West

Attendance

- Patrice Brown Brooklyn, NY Member
- Sheila Campbell Washington, DC Member
- Edward Donovan Holly Springs, NC Member
- Paula King Lexington, KY Member
- Ying Sa Des Moines, IA Member
- Thurston Smith Memphis, TN Vice Chair
- Kathryn Tracy Buckeye, AZ Member
- Jessica Wilson Byram, MS Member

Member Absent

- Licia Haynie Kaneohe, HI Member
- Nina Tross Apollo Beach, FL Chair
- Anthony Whitmarsh San Marcos, CA Member

Visiting Member

- Phil Kleiber TAP Chair
- Bob Moretti TAP V-Chair

Staff

- Terrie English TAP Director
- Matthew O’Sullivan Program Analyst
- Rosalind Matherne Program Analyst
- Michael Odom Wage & Investment
- Annie Gold Administrative Assistant

Roll Call

Quorum was met.

Welcome and Designated Federal Official (DFO) Report

Susan Jimerson opened the meeting and welcomed everyone to the call. Nina Tross could not be on the call. Thurston Smith agreed to act as Chair for the meeting. Members were congratulated on attending the last meeting for this TAP year. There were six new members to join TAP during this TAP year and three members (Sheila Campbell, Thurston Smith and Kathryn Tracy) will be retiring from the TAP. Congratulations were extended to them all for their hard work and

commitment to TAP. Members will be sent a TAP Survey to complete as the year closes out. They were encouraged to take the survey and share any helpful ideas they may have for TAP going forward. An overview of the Agenda and the following scheduled meetings was shared:

- There will be a Meet the Candidates Session on November 10, 2020 beginning at 3:00 pm, EDT. Candidates for the Chair and Vice Chair position will be able to share why they would be the best person for that position
- Mentorship meeting improving programs on Friday, November 13, 2020 beginning at 12:00 pm, EDT
- The Screening Committee next meeting will be held on November 17, 2020, at 1:00 pm, EDT
- Internal Communications Committee will meet on November 17, 2020 at 3:00 pm, EDT. They will go over the Newsletter for December
- The Outreach Committee last meeting for the year will be held on November 19, 2020 beginning at 12:00 pm, EDT
- The Joint Committee will have their last meeting for the year on November 19, 2020 beginning at 1:30 pm, EDT. Members were encouraged to attend the meeting if possible
- TAP Member Graduation Ceremony will be held on November 20, 2020 beginning at 11:00 am, EDT. Three members from TAC will be graduating: Sheila Campbell, Thurston Smith and Kathryn Tracy

National Office Report

Terrie English expressed her appreciation to all members for their dedication and hard work all year and for being on the call. Members were assured their work is being recognized. To the returning members, she shared her excitement to continual work with them. To the retiring members: Thurston Smith, Sheila Campbell and Kathryn Tracy, she expressed recognition of their dedicated commitment and all of the work they have done.

Phil Kleiber expressed gratitude to everyone and to the retiring members. He stated how the year has been a great one working with all the members.

Chair Report

Thurston Smith thanked the Staff for all their help. On behalf of Nina Tross, he thanked the members for their continual support and commitment and quality of work being done. Members were encouraged to commit to making the last Outreach commitments for the year.

Minutes for Approval

TAC October 13, 2020 Monthly Minutes were approved as submitted.

Sheila Campbell motioned and Kathryn Tracy second to approve the October 13, 2020 Minutes.

Member of the Public



None

Program Owner Report

Michael Odom stated the referral for Issue 40782, Google Maps for TAC Locations rebuttal was discussed during their last meeting. The other issue is for the Online TAC Appointment will be handled by W&I. He anticipates IRS response to be in by early December if not the issues would be carried over to next year.

Screening Report

Patrice Brown stated most of the issues that were listed on the Screening Report were dropped due to COVID, refund or individual issues. There were a couple issues referred to other project committees and some were placed in the Parking Lot for further review.

Members were encouraged to consider to be a part of the Screening Committee.

Tracy motioned and Campbell second to accept the Screening Report as submitted.

Decision: Full Committee Consensus accept then Screening Report as submitted.

Subcommittee Reports

Subcommittee 1

Campbell expressed her thank you to O'Sullivan and Jimerson for the opportunity to be a part of the committee and provided the following:

- **40462 Stand Still with Transcript and Innocent Spouse.**

Subcommittee 1 received the Attorney Advisor's review. They decided to wait for the response from Systemic Advocacy prior to completing their recommendation. O'Sullivan informed the committee of the response was received from SA and that a confirmation letter be sent to the Taxpayer. Discussions were held on the procedure when requesting a transcript. IRS response is Taxpayers received a letter for the process of requesting a transcript. The recommendation of Subcommittee 1 is to

Paula King motioned and Brown second to accept

Decision: Full Committee Consensus to accept the response from IRS

Subcommittee 2

King stated Subcommittee 2 discussed

- **Issue 40782 Improvement to Taxpayer Assistance Center (TAC)**

Webpage with Addition of Google Maps, Tracy added the changes have been made to the website and it is a win for TAP and Taxpayers.

Their recommendation is to accept IRS response and close Issue 40782

Tracy motioned and Jessica Wilson second

Decision: Full Committee Consensus to accept IRS response and close Issue 40782

Outreach Report

Smith informed members this will be his final mentioning of Outreach and shared the following reminders:

- The Outreach Reports are due to be turn in by the twenty-fifth of each month
- Members were encouraged to capture all activity relative to TAP. This includes what will be done after this meeting; phone calls and emails count. All information is important
- Thank you to all for their work

Internal Communications Committee (ICC)

O'Sullivan shared the following

- ICC had their meeting early for the month of November
- November Newsletter has been posted
- An article for the December Newsletter has been submitted for TAC

Action Items

O'Sullivan stated he will:

- Post the approved Minutes on www.TAPSpace.org and forward to Kevin Brown to be posted onto www.ImproveIRS.org
- Complete the Screening Report, drop cases that have been dropped, follow up with a Email to the Analysts on issues assigned to other project committees
- Forward a copy of Issue 40310 to Gilbert Martinez to be shared during the Joint Committee's meeting and updated in SAMS
- Close Issue 40782 out of the system as accepted after rebuttal

Roundtable

- Bob Moretti informed the committee, starting in December 01, 2020 members are to use the second tab at the bottom of the spreadsheet to report their time. November 21, 2020 is the deadline for the homeless to receive Stimulus.
- English thanked the committee for a job well done. Jimerson expressed gratitude to the Full Committee for their participation and appreciation for their work.

Closing

Jimerson officially closed the meeting.

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