

**Taxpayer Assistance Center Improvements Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Thursday, June 09, 2022**

**Designated Federal Officer**

- Susan Jimerson TAP West Chief

**Attendance**

- |                      |                  |            |
|----------------------|------------------|------------|
| • Denise Andrews     | Katy, TX         | Member     |
| • Michaela Binsfeld  | Saint Paul, MN   | Member     |
| • Philip George      | Saint George, UT | Member     |
| • Sarah Holtzclaw    | Pleasanton, GA   | 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     |
| • Danielle Roberts   | Charlotte, NC    | Member     |
| • Charlie Simineo    | Cheyenne, WY     | Vice Chair |
| • Nina Tross         | Apollo Beach, FL | Chair      |

**Guest Member**

- Martha Lewis National Office TAP Chair
- Eugene Lillie National Office TAP Vice 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)

**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:

- June 15, 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
- June 16, 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. Information will be shared on Outreach methods and how to do Outreach. The project committees' Vice Chairs will be in attendance
- June 22, 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
- June 22, 2022, the Mentorship wrap up session will be held beginning at 3:00PM, EDT. Rosalind Matherne is the Lead Analyst
- June 23, 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

### **National Office**

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

- Emails are being sent to members sharing information on the IRS Tax Forums that are scheduled to begin on July 19, 2022 and run through August 18, 2022. The Analyst will be reaching out to members to see if anyone would be interested in volunteering to man the virtual Tax booths by answering questions about TAP. This will be a good experience to see what taxpayers are asking.
- Members will receive an email reminder with information about the TAP Quarterly meeting scheduled for June 13, 2022. This meeting is not open to the public. There will be additional training provided for members. The agenda will be sent by email. The National Taxpayer Advocate, Erin Collins will be present to speak with TAP on what is going on with TAS and TAP. Members were encouraged to attend. There will be some media training on how to deal with and answer questions from the media. Information will be shared on what members should do when approached. News articles will be discussed. TAP shares the news articles on the website
- The NTA June Report to Congress Report will be out soon. Members were encouraged to go online and familiarize themselves with it and what is going on and what the NTA deals with

### **Chair Report**

Nina Tross welcomed members to the call and shared the following updates:

- Members were encouraged to attend the scheduled meeting to hear the National Taxpayer Advocate, Erin Collins speak

- Welcome to TAC newest members: Denise Andrews, Michaela Binsfeld and Danielle Roberts each introduced themselves to the committee. Binsfeld and Roberts had been assigned to a subcommittee. Tross will reach out to the new members to make sure they have all the needed information for the committee. Matthew O'Sullivan, Susan Jimerson and Tross are available for questions
- Thank you expressed to Conner McFarland for submission of the Newsletter article for June
- Members were encouraged to think of submitting an article for July
- Individual issues are not an issue to help Taxpayers with
- Martha Lewis and Eugene Lillie joined the sat in on the call. Lewis introduced herself and welcomed everyone on the call. All the work done by the committee members is important. Lillie also introduced himself and welcomed members to the call. If any member has plans for Outreach or have questions on Outreach were asked to reach out to him
- Jimerson added there will be a New Member session scheduled for new members. Information to be shared soon. O'Sullivan asked if the new members would send him any questions to be addressed

### **Minutes Approval**

TAC May 12, 2022, TAC Minutes were approved as submitted.  
Charles Simineo motioned and Paula King seconded

### **Public Comment**

N/A

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

Michael Odom introduced himself to members and shared an overview of his position assisting TAP. He shared the following Program Owner's report:

- W&I currently there are no open referrals
- There is one reconsideration **Issue 41122**, Accessibility to TACs due December 01, 2022
- There are no implementations
- Two questions were submitted. One question was on the Oil and Gas Depletion Deductions. The response was received, and additional research was requested on the expansion of service in VITA and TC sites. The other question pertained to how often the website [www.IRS.gov](http://www.IRS.gov) gets updated to show TAC office closures. Waiting for approval to send out.
- Tross stated for the new members, IRS uses a lot of acronyms. SME is acronym for Subject Matter Expert.

### **Subcommittee Report**

Subcommittee 1

Philip George shared the following updates for Subcommittee 1:

- The subcommittee met on June 02, 2022

- Discussions were held on the Oil and Gas Royalty training issue. IRS rejected the recommendation. Subcommittee 1 recommended closing the issue. Tross reminded the committee of the open request for additional information. Odom stated an answer will be provided to the subcommittee for the questions submitted. Subcommittee 1 will wait for the response and render their recommendation during next month's meeting
- The VITA Project Review was discussed during the subcommittee's meeting: Publication 4012 Volunteer Resource Guide and Publication 4491 Training Guide the timing is going well
- Subcommittee 1 and 2 discussed and reviewed the Blank Issue Referral form

#### Subcommittee 2

Paula King stated Subcommittee 2 is working on the same things Subcommittee 1 is working on

- King participated in one of the blanket reviews
- A follow up will be coming on the 4012 with the next meeting on June 22, 2022. Members who are able will participate
- Subcommittee 2 is reviewing things that come up in the TAC offices
- Members were able to go into and review inside the TAC office. They took pictures. There will be a report out during the next meeting

#### **Screening Committee**

Conner McFarland provided the following updates:

- There were over one hundred-fifty Issues reviewed. The majority were individual issues. Other Issues were already being addressed by IRS or TAP committees. The Screening Committee made no referrals to the subcommittees

#### **Outreach**

Charlie Simineo stated the Outreach Committee:

- O'Sullivan sent all Activity logs he had received
- Members were encouraged to enter the Activity Reports on [www.TAPSpace.org](http://www.TAPSpace.org) The results are reported to Congress and figure out what is going on
- The Outreach Committee meetings are spent talking about Social Media, external media and means of animation available to use
- The main reason for Outreach is to get the word out on how to work on improving IRS
- The IRS Stakeholders meeting is held monthly. They discuss the issues Taxpayers are having. This is a good way to get the word out on [www.ImproveIRS.org](http://www.ImproveIRS.org)
- Outreach is actively trying to recruit TAP members in under-represented states to try and get them involved
- Members were encouraged to reach out to LTAs, sit in on their meetings and listen for possible issues

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

Sarah Holtzclaw shared the following:

- Holtzclaw volunteered to assist with the July Newsletter
- She shared discussions on possible ways to better share information about what other TAP committees are working on and include them in the Newsletter

### **Action Items**

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

- Forward the approved May 12, 2022 TAC minutes to Kevin Brown for posting on [www.ImproveIRS.org](http://www.ImproveIRS.org) and [www.TAPSpace.org](http://www.TAPSpace.org)
- Work on legacy Issues 40310, Transcripts Online
- Update the Screening Report and share a new Screening Report with Committee for next month's issues
- Photos of TAC offices will be shared with members
- Follow up with Odom on answers to questions and forward to members
- Forward phone numbers to members. Jimerson added the numbers were not included on the rosters but will make sure members received them

### **Roundtable**

Tross asked for any comments, suggestions or questions:

- King asked if members would be contacted on the Activity Reports. Simineo and Tross agreed the issue is not submitting the reports
- New Members will be having a orientation meeting
- Denise Andrews asked if there was a list of acronyms available. Jimerson pointed out they are listed in the TAP Handbook on page 66. Members are encouraged to reach out with questions
- Holtzclaw shared how helpful employees were in the TAC offices including the security guards. It was a very nice experience

Jimerson thanked everyone for being on the call. Welcome aboard New Members.

### **Closing**

Jimerson officially closed the meeting.

**Next Meeting: Thursday, July 14, 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.**