

**Taxpayer Assistance Center Improvements Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Thursday, July 14, 2022**

**Designated Federal Officer**

- Susan Jimerson                      TAP West Chief

**Attendance**

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| <ul style="list-style-type: none"> <li>• Michaela Binsfeld</li> <li>• Philip George</li> <li>• Sarah Holtzclaw</li> <li>• Paula King</li> <li>• Daniel Leatham</li> <li>• Conner McFarland</li> <li>• David Newingham</li> <li>• Charlie Simineo</li> <li>• Nina Tross</li> </ul> | <ul style="list-style-type: none"> <li>Saint Paul, MN</li> <li>Saint George, UT</li> <li>Pleasanton, GA</li> <li>Lexington, KY</li> <li>Shrewsbury, MA</li> <li>Augusta, ME</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>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>• Denise Andrews</li> <li>• Anthony Jackson Jr</li> <li>• Danielle Roberts</li> </ul> | <ul style="list-style-type: none"> <li>Katy, TX</li> <li>New Orleans, LA</li> <li>Charlotte, NC</li> </ul> | <ul style="list-style-type: none"> <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>• Anthony Earwood</li> </ul> | <ul style="list-style-type: none"> <li>San Antonio, TX</li> </ul> | <ul style="list-style-type: none"> <li>Member</li> </ul> |
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**Staff**

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| <ul style="list-style-type: none"> <li>• Terrie English</li> <li>• Matthew O'Sullivan</li> <li>• Rosalind Matherne</li> <li>• Conchata Holloway</li> <li>• Gilbert Martinez</li> <li>• Annie Gold</li> <li>• Michael Odom</li> </ul> | <ul style="list-style-type: none"> <li>TAP Director</li> <li>TAP Program Analyst</li> <li>TAP Program Analyst</li> <li>TAP Program Analyst</li> <li>TAP Program Analyst</li> <li>TAP Administrative Assistant</li> <li>Wage &amp; Investment (W&amp;I)</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:

- July 20, 2022, the Ad Hoc Committee for the TAP Chairs and ICC will meet at 2:30 PM, EDT
- July 21, 2022, beginning at 12:00 PM, EDT the Outreach Committee will have their meeting. Dr. Eugene Lillie heads this committee. The project committees' Vice Chairs will be in attendance
- July 27, 2022, beginning at 12:00 PM, EDT the Internal Communications Committee (ICC) will have their scheduled monthly meeting. The ICC works on external and internal communications. They also work on the Handbook
- July 28, 2022, the beginning at 1:30 PM, EDT Joint Committee will have their monthly meeting. TAP National Chair, Martha Lewis heads this committee. The Chairs attend this meeting

### **National Office**

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

- Thank you was expressed to members for their 100% participation in the Tax Forums. All the slots are filled
- Recruitment invites have been sent to members asking for their availability to assist with the interviewing of the 2023 applicants
- There will be a face-to-face meeting for the Joint Committee Planning Session this year. The committee Chairs have been invited to attend. The meeting dates are August 09, 2022, through August 11, 2022. Members and staff are encouraged to call and listen in. Members were encouraged to share any information with Leigh Ann Wood to present during the meeting.

### **Chair Report**

Nina Tross was not able to join the call to share the Chair Report. She joined later during the meeting. Charlie Simineo lead the meeting.

### **Minutes Approval**

TAC June 09, 2022, TAC Minutes were approved as submitted. Charles Simineo motioned, and Paula King seconded

### **Public Comment**

N/A

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

Michael Odom 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

- Two questions were submitted:  
One question asked on how often IRS.GOV updates information on whether TAC offices are open or closed. It is due and waiting for the response.  
Returns affected by Oil and Gas Depletion Deductions. Odom is waiting on research for a response. The research is continuing to work on this.  
They are working to find out the percentage of individuals with this issue.
- The last set of questions are on TAC signage, security, and walk-ins:  
Three questions due August 11, 2022. Odom is working to get answers for these questions

### **Subcommittee Report**

#### Subcommittee 1

Philip George shared the following updates for Subcommittee 1:

- The subcommittee met on July 07, 2022. Eugene Lillie attended to assist
- They requested Matthew O'Sullivan to follow up on the response from W&I on the Oil and Gas Royalty training issue
- Discussion was held on the signage, security and walk-ins issue. Both subcommittees are working on these issues. Charles Simineo and Paula King will work together on this
- There are no updates on the VITA Project Review since their last meeting
- A new Screening Report effort was done on July 05, 2022. They are discussing how to rearrange how to present the issues

#### Subcommittee 2

Paula King shared the following updates:

- Subcommittee 2 is working on the same issues as Subcommittee 1 for project 54682, Prohibited Items
- They are looking to draft a recommendation referral after some questions are answered. Members with suggestions are encouraged to participate and share ideas. Simineo and King will take the lead

### **Screening Committee**

Conner McFarland provided the following updates:

- The Screening Committee's meeting was held on July 05, 2022
- Issue numbers are: 53 referrals, 23 assigned to TCC, 11 to TAC, 10 sent to Toll Free, and 9 to Special Projects. A total of 77 were dismissed
- Matthew O'Sullivan pointed out the issues will be assigned over after they have been approved
- Four items were divided between Subcommittee 1 and Subcommittee 2. Each receiving two for their subcommittee. Members will be notified of the issues assigned

**McFarland motioned and Sarah Holtzclaw seconded**

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

## **Outreach**

McFarland stated the Outreach Committee:

- Members were encouraged to enter the Activity Reports on [www.TAPSpace.org](http://www.TAPSpace.org) after the twenty-fifth of the month. O'Sullivan will share a report on submission. McFarland will be reaching out to members to assure reports are submitted timely
- Members were informed of simple things that could be done in doing Outreach: talking to friends, explaining what TAP is about, speaking with the LTA for information to participate in their scheduled events, be willing to speak on what TAP is all about in communities and social organizations, local events, connect with VITA and Tax Counseling for the Elderly or Tax aide through AARP site coordinator. It is vitally important to complete Outreach and record time spent on the Activity Report

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

Sarah Holtzclaw shared the following:

- ICC met and discussed the format of the Newsletter and how to make it easier for members to read. A template was created and will try it out for TAC on next month August.
- O'Sullivan added Holtzclaw volunteered to write the article for next month

## **Action Items**

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

- Forward the approved June 09, 2022, TAC minutes to Kevin Brown for posting on [www.ImproveIRS.org](http://www.ImproveIRS.org) and [www.TAPSpace.org](http://www.TAPSpace.org)
- Update the Screening Report and share a new Screening Report with Committee for next month's issues and inform members of assignments
- Follow up with Odom on answers to questions and forward to members
- Complete the Activity Reports summary and forward to the TAC Chair and Vice Chair

## **Roundtable**

Tross thanked Simineo for stepping in during her absence and members for participating:

- Tross inquired if the Newsletter intended for the public or for the Committee members. O'Sullivan responded it is for the committee members and Alternates. She suggested a blurb be added at the end explaining what the committee was charged to do. Jimerson added the ICC was looking into doing this as a part of the template
- David Newingham shared information from his attending the Tax Fest in Las Vegas. There were three thousand taxpayers in attendance. The Commissioner shared information with everyone. Newingham had the opportunity to speak with Erin Collins, National Taxpayer Advocate. He was able to obtain some positive information and some things to work on. Taxpayers were able to meet and schedule appointments with the LTAs. Newingham personally spoke with over 600 Taxpayers who did not know

- about TAP. One thing he did get was TAP has to work along with TAS to accomplish the mission. TAS receives all the issues the public has. He stated he will be attending all events, large or small that are scheduled
- English added TAP is heavily into Outreach. Members are asked to attend events to get the word out there. Due to the pandemic Outreach travel was not authorized. Now things are changing and there will be more interactions. O'Sullivan will speak with Newingham on the particulars for TAP members responsibilities. Members were assured their names are known by the Commissioner and Erin Collins. She assured members she is always available to speak with them
  - Holtzclaw asked if there is an organizational chart available. English stated the information will be shared with the Chairs to have access to

Jimerson thanked everyone for being on the call. Newingham was thanked for presenting a very good report. Information is share with W&I when information is known where an individual was denied access to the TAC.

### **Closing**

Jimerson officially closed the meeting at 3:48 PM, EDT.

**Next Meeting: Thursday, August 11, 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.**