

**Taxpayer Assistance Center Improvements Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Thursday, August 11, 2022**

Designated Federal Officer

- Susan Jimerson TAP West Chief

Attendance

- | | | |
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| • Mikaela 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 |
| • David Newingham | Henderson, NV | Member |
| • Charlie Simineo | Cheyenne, WY | Vice Chair |
| • Nina Tross | Apollo Beach, FL | Chair |

Member Absent

- | | | |
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| • Denise Andrews | Katy, TX | Member |
| • Conner McFarland | Augusta, ME | Member |
| • Danielle Roberts | Charlotte, NC | Member |

Visiting Member

- Eugene Lillie TAP Vice Chair

Staff

- | | |
|----------------------|------------------------------|
| • Matthew O'Sullivan | TAP Program Analyst |
| • Rosalind Matherne | TAP Program Analyst |
| • Conchata Holloway | TAP Program Analyst |
| • Rosalind Matherne | TAP Program Analyst |
| • Annie Gold | TAP Administrative Assistant |
| • Michael Odom | Wage & Investment (W&I) |
| • Tamikio Bohler | W&I |
| • Jenine Robertson | TAS Systemic Advocacy |
| • Cindy Jones | W&I Program Manager |

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:

- Today is the close out for the Joint Committee's Planning Session. TAP National Chair and Vice Chair attend all both sessions. There have been good discussions for the 2023 TAP year. Members were encouraged to join the call and listen in. Additional information will be coming out on things discussed on the Ad Hoc projects
- August 18, 23, and 31, 2022 the MSP Ad Hoc Committee calls are scheduled. Members were encouraged to join and listen in on the calls. Members were also encouraged to sign up for one of the meeting days
- The Ad Hoc Committee meeting for the TAP Chairs and Internal Communications Committee (ICC) has been cancelled for this month
- August 18, 2022, beginning at 12:00 PM, EDT the Outreach Committee will have their meeting
- August 24, 2022, beginning at 12:00 PM, EDT the ICC will have their scheduled monthly meeting
- August 25, 2022, the beginning at 1:30 PM, EDT Joint Committee will have their monthly meeting. The meeting is scheduled for 1.5 hours

National Office

Terrie English could not be on the call today.

Chair Report

Nina Tross welcomed everyone to the meeting and provided the following information for the Chair Report:

- Tross participated in the Joint Committee's Planning Session on Tuesday and Wednesday of this week along with TAP Staff; Sheila Andrews, Terrie English, National Taxpayer Advocate, Erin Collins joined the first day for discussions. Maryclaire Ramsey, Susan Jimerson and Cedric Jeans were in attendance as well.
- Appreciation to all members on their attendance and the jobs well done
- Thank you expressed to Sarah Holtzclaw for submitting the article for the Newsletter
- Matthew O'Sullivan will be sharing a copy of the ICC template with members after today's call. Member participation was encouraged to submit articles for the Newsletter
- Reminder expressed to members on how important the Annual Report is. The National Taxpayer Advocate, Erin Collins shares the report with Congress and the Commissioner. It keeps them aware of what has been done over the past eight months. The Joint Committee is looking for members to assist with the Annual Report. Members who did not receive a copy of the Annual Report should let O'Sullivan know and he will get a copy sent right away

- Members were encouraged to sign up and work with the Ad Hoc Team on the most serious problems
- Angela Madison and Eugene Lillie are planning things for the National Taxpayers Appreciation Day scheduled for January 14, 2023. They will be looking for information and assistance. Reach out to O'Sullivan if anyone would like to volunteer to assist
- The LTA from Hawaii attended the Joint Committee Planning Session using Zoom. She informed members their LTAs are required to reach out to TAP and work with members. If members have not been able to contact their LTA please contact O'Sullivan to assist
- Cindy Jones shared information with the committee on W&I and how they have huge responsibilities during Tax season, timelines on when things happen, responses that have come through the www.IRS.gov website and viewed the Voice box how they are there to help. They discussed humanizing that was interesting on how the public view IRS and having a connection with a human. More information may come on this. The Joint Committee shared some brainstorming ideas on issues TAP should address next year
- There was a lot of information shared. Members who will be continuing on with TAP were encouraged to think about becoming a Joint Committee Member

Minutes Approval

TAC July 14, 2022, TAC Minutes were approved as submitted.

Philip George made the motion to approve, 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 recommendations or referrals
- There is one reconsideration **Issue 41122**, Accessibility to TACs due December 01, 2022
- There were no implementation checks
- Two questions were submitted:
One question asks 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. He is working to get an answer on this question for the committee
- The last set of questions are on TAC signage, security, and walk-ins: there were a set of four questions on this and Odom is working to get answers for these questions by next week

Subcommittee Report

Subcommittee 1

Philip George shared the following updates for Subcommittee 1:

- Both subcommittees met on August 04, 2022
- They discussed the Oil and Gas Royalty training issue. Odom's responded during this meeting. The subcommittee will discuss at next month's meeting
- Issue 54682, Prohibited Items the draft referral was sent by O'Sullivan to both subcommittees. More discussion will be held
- Issue 55247, No Tax Help Available the Taxpayer had no IRS TAC office available within one hundred miles. Research proved there were sites opened. Subcommittee 1 recommended the issue be dropped
Phillip George motioned Issue 55247 be dropped and Daniel Leatham seconded

Decision: Full Committee Consensus approved Subcommittee 1 recommendation to drop Issue 55247

Subcommittee 2

Paula King shared the following updates:

- Both subcommittees completed the referral for **Issue 54682**, Prohibited Items. Subcommittee 1 still has to review for possible changes. It will be coordinated between the two subcommittees, presented to the full committee, once approved forwarded to SA and Attorney Advisor to elevate to the Joint Committee
- O'Sullivan added a discussion was held on last week and it was determined it is against IRS policy to have security guards making determinations. Management advised to reach out to management in the TAC offices and inform them of the complaint issues. Jimerson added that it is not IRS policy. The security guards are there to screen for security. The IRS staff determines if an appointment is needed or resolved the same day. When individual issues occur, they are forwarded to W&I to address. Subcommittee 2 recommended Issue 55657 to be closed. King made the motion to close Issue 55657 and Sarah Holtzclaw seconded

Decision: Full Committee Consensus approve to close Issue 55657

- **Issue 55988**, Wait Time up to Long on the Phone Lines the Full Committee members were to share suggestions or comments with Subcommittee 2

Screening Committee

O'Sullivan shared the following in Conner McFarland's absence:

- There was no Screening Committee Meeting this month. There will be a Screening Committee Meeting next month.

Outreach

Charlie Simineo stated he did not attend the meeting, but he did read over the TAP News article. Eugene Lillie shared the following for the Outreach Committee:

- He agreed the Joint Committee Planning session was a good meeting with lots of energy and a lot was accomplished. It was good to be face to face
- He stated Erin Collins officers will possibly conduct training during the time of the National Taxpayers Appreciation Day to form a Tax resolution day. TAP will work directly with them at a table in an IRS facility nationwide. This will be an opportunity for TAP to work directly with them. They will see how TAP does it and TAP will see how they do it. The opportunity to get systemic issues to address is the idea. Lillie will be reaching out to Simineo.
- The other topic discussed is close the deal. Get to the systemic issue TAP will be able to address. Members were encouraged to close the deal. Look beyond the individual issue to see if there are issues beyond that for TAP to work. The member focus is making referrals up to IRS. Members were encouraged to try and finish the year strong

Internal Communications Committee (ICC)

Sarah Holtzclaw shared the following:

- ICC would like to see if the other TAP committees are using the template
- Members were encouraged to volunteer to submit the article for next month. Jimerson added the template was shared with the committee Chairs during the Joint Committee Planning Session. O'Sullivan added during the next ICC meeting ask the members to advocate for it

Action Items

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

- Forward the approved July 14, 2022, TAC minutes to Kevin Brown for posting on www.ImproveIRS.org and www.TAPSpace.org
- The template was forwarded to members during today's meeting
- Issue 55247 and 55657 will be dropped and appropriate actions on the SAMs
- Follow up to find out where Issues are being sent in W&I
- Follow up with Odom on Depletion deduction and send to members once received
- Research inventory and other items; get formal information and share with Committee
- Work with members when draft of prohibited items and forward draft to members

Roundtable

- Tross encouraged members to use www.TAPSpace.org

- Members should be using www.TAPSpace.org to complete the Activity reports Updates are constantly being made. There is an ImproveIRS article that will allow members to express opinions or things they would like to see. Also, any ideas for items to be used in a blog.
- King expressed “thank you” to Holtzclaw and Binsfeld for assisting her in completing the referral

Jimerson thanked everyone for being on the call and participating. Members were encouraged to take time to update Activity records and join in on the Joint Committee’s meeting to listen in on August 25, 2022.

Closing

Jimerson officially closed the meeting at 3:54 PM, EDT.

**Next Meeting: Thursday, September 08, 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.