



**Taxpayer Assistance Center Improvements Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Thursday, September 8, 2022**

**Designated Federal Officer**

- Susan Jimerson TAP West Chief

**Attendance**

- |                      |                  |            |
|----------------------|------------------|------------|
| • Mikaela Binsfeld   | Saint Paul, MN   | Member     |
| • Philip George      | Saint George, UT | Member     |
| • Anthony Jackson Jr | New Orleans, LA  | Member     |
| • Paula King         | Lexington, KY    | Member     |
| • Conner McFarland   | Augusta, ME      | Member     |
| • David Newingham    | Henderson, NV    | Member     |
| • Charlie Simineo    | Cheyenne, WY     | Vice Chair |

**Member Absent**

- |                    |                  |        |
|--------------------|------------------|--------|
| • Denise Andrews   | Katy, TX         | Member |
| • Sarah Holtzclaw  | Pleasanton, GA   | Member |
| • Daniel Leatham   | Shrewsbury, MA   | Member |
| • Danielle Roberts | Charlotte, NC    | Member |
| • Nina Tross       | Apollo Beach, FL | Chair  |

**Visiting Member**

- |                 |                 |                |
|-----------------|-----------------|----------------|
| • Martha Lewis  | National Office | TAP Chair      |
| • Eugene Lillie | National Office | 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                          |

**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:

- September 15, 2022, beginning at 12:00 PM, EDT the Outreach Committee will have their meeting and is led by Eugene Lillie
- September 21, 2022, the Ad Hoc Chair meeting begins at 2:30 PM, EDT for the Project Chairs and ICC
- September 22, 2022, the beginning at 1:30 PM, EDT Joint Committee will have their monthly meeting. This is the meeting of the Chairs and Vice Chairs of the project committees, National TAP Chair and Vice Chair along with the ICC members
- September 28, 2022, beginning at 12:00 PM, EDT the ICC will have their scheduled monthly meeting

### **National Office**

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

- The Ad Hoc meetings are in full swing. They are looking at the most serious problems. Erin Collins has made this one of her causes and that TAP members are involved. The two meetings that have already been held have gone very well. Thank you to members who participated. The meetings that have gone through are looking at having a part two session. More information will be forthcoming on the scheduling
- TAP's twentieth year anniversary will be celebrated on October 1, 2022. Information will be shared on the different things being planned
- Information has started going out to members for the Annual Report for TAP. Members will be consulted on putting information about the anniversary on the cover of the Annual Report. Some great pictures were presented during the Joint Committee's Planning session. Appreciation to Eugene Lillie for making sure great pictures were taken

### **Chair Report**

Martha Lewis shared the following:

- All the Chairs came together and had a wonderful time getting to know and meeting with each other. Once each year the Joint Committee Planning Session gather and focus on plans for the next year. They had guests to come and speak including the National Taxpayer Advocate, Erin Collins, Maryclaire Ramsey, Sheila Andrews, and other speakers. Lots of decisions were made
- Discussions on the Annual Report were done. Members with ideas were encouraged to share on the twentieth-year anniversary for TAP
- Eugene Lillie added the Joint Committee Planning Session was able to come up with good ideas for referrals during their breakout sessions. They were able to come up with four referrals in fifteen minutes. He expressed how impressive it was. He encouraged members to send their information

to Gilbert Martinez in response to the email message he sent to members on the TAP anniversary.

- The website [www.ImproveIRS.org](http://www.ImproveIRS.org) has been having problems but is back up and running

### **Minutes Approval**

TAC August 11, 2022, TAC Minutes were approved as submitted.

Paula King made the motion to approve the minutes and Philip George 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 1, 2022
- There were no implementation checks
- There is one question on how to set up equipment calls and is due on October 3, 2022

### **Subcommittee Report**

Subcommittee 1

Philip George shared the following updates:

- Subcommittee 1 meet on September 1, 2022, and discussed several issues
- **Issue 54682**, TAC Prohibited Items Subcommittee 2 submitted a draft of the referral and Subcommittee 1 reviewed it and determined it was good recommending good improvements. Matthew O'Sullivan forwarded the referral to the SA and Attorney Advisor for review. O'Sullivan added the response has been received and he will forward to members after SA sends their response  
**Issue 44436**, Oil and Gas Royalty training issue. The recommendation sent to IRS was declined research on depletion. Subcommittee 1 recommended to accept IRS response

Daniel Leatham will write the article for the October Newsletter.

Subcommittee 2

Paula King shared the following updates:

- Subcommittee 2 had their meeting on September 01, 2022
- Thank you expressed to Subcommittee 1 for their approval of the recommendation submitted by Subcommittee 2
- **Issue 55988**, Developing a form requesting an appointment. Subcommittee 2 submitted questions to IRS and are waiting on the

response to move forward. O'Sullivan indicated the questions was submitted to IRS and Odom will get the response by the October date

### **Screening Committee**

Conner McFarland shared the following updates:

- The Screening Committee had their meeting on August 30, 2022
- Thirty-nine issues were reviewed
- No issues were referred to the committees
- There were some issues tabled for future research

### **Outreach**

Charlie Simineo stated he was concerned about the reporting submission of the Activity Reports

- Members are not reporting the correct hours on the reports. There are some members who have completed more hours than what they are reporting. Encouragement was extended to members to put in all hours
- One member reported over two hundred hours. A special thank you message was sent to that individual
- The report goes to Congress and Simineo stressed how important reporting the hours are
- Members who may have questions on reporting their hours were encouraged to reach out to O'Sullivan and Simineo for assistance
- Outreach messages were discussed in their meetings
- Encouragement to members to reach out to their LTAs for possible Outreach opportunities
- Members were encouraged to reach out to individuals in their states to consider applying to become a member of TAP

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

O'Sullivan shared the following:

- Daniel Leatham volunteered to write the next News article. Sarah Holtzclaw would like to assist with the article
- A lot of progress is being made on the Handbook. ICC will present some of their work on the Handbook by the end of the TAP year
- The Facebook page is up and running if members would like to look at it
- O'Sullivan will work the Newsletter this month and look to have it completed on time

### **Action Items**

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

- Forward the approved August 11, 2022, TAC minutes to Kevin Brown for posting on [www.ImproveIRS.org](http://www.ImproveIRS.org)
- Close issue out on the Oil and Gas Royalty
- Continue to monitor responses for questions submitted to IRS
- Monitor response from SA and forward to members as soon as they are received



- Send a message to members when [www.ImproveIRS.org](http://www.ImproveIRS.org) and [www.TAPSpace.org](http://www.TAPSpace.org) have been restored for access
- Reminder to members to complete their activity reports

### **Roundtable**

- King reminded members to access [www.ImproveIRS.org](http://www.ImproveIRS.org) and enter recommendations. Members reminded to introduce themselves as a TAP member
- Simineo reminded members to submit their activity reports when [www.ImproveIRS.org](http://www.ImproveIRS.org) is back up and running

Jimerson thanked everyone for being on the call and participating.

### **Closing**

Jimerson officially closed the meeting at 3:35 PM, EDT.

**Next Meeting: Thursday, October 13, 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.**