



**Taxpayer Assistance Center Improvements Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, April 11, 2023**

Designated Federal Officer

- Susan Jimerson TAP West Chief

Attendance

- Anthony Jackson Jr New Orleans, LA Member
- Daniel Leatham Shrewsbury, MA Vice Chair
- Cynthia Mills Glenside, PA Chair
- David Newingham Henderson, NV Member
- Joseph Parampathu Irvine, CA Member
- Charlie Simineo Cheyenne, WY Member

Member Absent

- Denise Andrews Katy, TX Member
- Mikaela Binsfeld Saint Paul, MN Member
- Conner McFarland Augusta, ME Member
- Danielle Roberts Charlotte, NC Member

Visiting Member

- Eugene Lillie West Deptford, NJ TAP Chair

Staff

- Frank Bustos Acting TAP Director
- Matthew O’Sullivan TAP Program Analyst
- Conchata Holloway TAP Program Analyst
- Hannah Jair TAP Program Analyst
- Rosalind Matherne TAP Program Analyst
- Annie Gold TAP Administrative Assistant
- Mejbeen Balsara W&I Operation Support Program

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 shared.



National Office

Frank Bustos welcomed everyone to the meeting. Members were reminded TAP is here to guide improvements to the Tax Administration.

- Members were reminded they are held to a higher standard than normal Taxpayers
- TAP members represent their states as representative of the TAP panel
- File taxes timely
- If needed, file for an extension remember this is not a waiver to not pay the tax and taxes are still required to be paid timely
- If anyone hasn't filed taxes in the past three years and have a filing requirement, make sure to do so
- Compliance checks have been ordered for each member of TAP. Reports will be sent to Bustos withing the next week. If anyone has a requirement and have not paid, members were encouraged to do so
- Any taxes owed and not in an arrangement stage make sure to work something out with IRS to get on a payment plan or installment agreement. His expectation is to make sure no member of TAP will be lost due to non-compliance
- TAP members will be in Washington, DC next month. TAC will arrive for full day Wednesday, Thursday, and travel Friday. There will be some heavy hitters invited to the meeting. Annie Gold will be reaching out to each member to arrange travel reservations
- Travel training will be held within the next seven days. The exact date and time will be shared. The training will provide information on getting reimbursed timely and what will be needed to get the reimbursements process as quickly as possible
- Members were encouraged to consider gathering for possible dinner on Thursday night as a committee. Let the Chair and Vice Chair know if who is interested
- Bustos received the Strategic Operational Plan from the Commissioner
- Members were encouraged to reach out to Bustos with any concerns and/or questions
- Bustos had to leave to attend a mandatory training session. He is excited and is looking forward to working with the committee

Confirmation of Chairs

Jimerson stated Cynthia Mills and Daniel Leatham could not be confirmed due to lack of quorum.



Jimerson asked for a motion to accept the election of TAC Chair and Vice Chair for TAP year 2023.

Charlie Simineo moved, and David Newingham seconded

Decision: Full Committee Consensus accept the election for Cynthia Mills, Chair and Daniel Leatham, Vice Chair

DFO Report

Jimerson shared the following DFO Report:

- Internal Communications Committee (ICC) will have their first official meeting on April 18, 2023, beginning at 12:00 PM, EST
- The Joint Committee will have their first meeting on April 26, 2023, beginning at 2:00 PM, EST for 1.5 hours
- Notification for the Outreach Committee scheduled meeting will be shared very soon
- Next month will be the Face-to-Face meeting. The normal monthly committee meeting for the second week in May have been cancelled due to travel for the FTF meeting

Chair Report

Cynthia Mills welcomed members to the meeting. She introduced herself and expressed her anticipation and looking forward to serving as the TAC Chair. All TAC members are returning but one who is new to the committee.

- Members were encouraged to update their profiles in www.TAPSpace.org.
- Subcommittee Chairs were asked to make sure to provide their Newsletter input a week before the Newsletter is due.
- O'Sullivan needs to have the Newsletter in hand by the twenty-fifth of the month. Hannah Jair will be assisting O'Sullivan. Mills asked if the subcommittee Chairs would have them to O'Sullivan by the 4/18/2023

Minutes Approval

November 10, 2022, meeting minutes were reviewed and approved.

Charlie Simineo made the motion to accept the minutes as submitted. Daniel Leatham seconded.

Public Comment

None

Program Owner Report

Mejbeen Balsara introduced herself to the committee. Members were encouraged to send questions to O'Sullivan who will forward to her. She is looking forward to working with the committee.

Subcommittee Report

Subcommittee 1



Charlie Simineo stated Subcommittee 1 met on last week. Discussed project committee issues and selected the Chair of Subcommittee 1.

- He volunteered to be on the 202kTask Force. Members encouraged to volunteer to be on the VITA or Tax counseling for the elderly
- Taxpayer Communications Record Keeping looks like the big issue that will keep the subcommittee busy. How long does it take to receive your taxes, what does IRS website say about it, are there any brochures are some of the questions Subcommittee 1 has been asked to look at
- Volunteers needed for the Newsletter. O'Sullivan stated Cynthia Mills volunteered for May and Joseph Parampathu volunteered for June to submit the newsletter article

Subcommittee 2

Daniel Leatham stated Subcommittee 2 met after Subcommittee 1. They discussed the following:

- Issue #66142, Annual Review of VITA TCE Training materials. David Newingham agreed to work with Subcommittee 2 on this project. It is open to all of the other subcommittee members
- Issue #55988, Proposal to Allow Taxpayer to fill out a form stating their issue as opposed to getting on the phone to contact IRS. Subcommittee 2 will be proposing two proposals; 1. Reintroducing kiosks and 2. Creating a virtual appointment system online

Screening Committee

O'Sullivan stated most members have been on TAC before and understand the screening process. Questions were encouraged.

- The Screening Committee has not had a meeting. O'Sullivan assembled a report with all issues from November. There is a lot to go through
- The Screening process involves the Screening Committee goes through all of the issues, decide what is or is not a TAP issue, if it is a TAP issue is it an issue for TAC or another committee
- Joseph Parampathu and Cynthia Mills have volunteered to assist with the screening process. The three of them come together and determine what is an appropriate issue or not. A recommendation goes to the full committee which would require quorum.
- O'Sullivan will reach out to Parampathu, Mills and Jimerson to set up a meeting to go through the Screening Report
- Members are welcome to volunteer to be a part of the Screening Committee
- There will be a Screening Committee meeting prior to the FTF meeting in May. Recommendations will be brought to the FTF resulting from the meeting



- Members were encouraged to reach out to O'Sullivan with any issues or problems with www.TAPSpace.org
- The Screening Report is posted in www.TAPSpace.org the link to the report is sent to members in an email. Members are able to click on the link to access a document. Jimerson added everyone will have the opportunity to be involved during the exercise that will be held at the FTF meeting

Outreach Report

Daniel Leatham stated this is the first Joint Committee meeting.

- Members were encouraged to complete their Outreach reports. He is available for questions and encouraged members not to hesitate to reach out to him
- Any Outreach activities perform from November to now were encouraged to include it on their reports
- Any member with creative activities, were encouraged to share with the Outreach Committee. They are always looking for ideas to conduct Outreach
- Fred Smith, Program Analyst over Recruitment, and the Outreach program introduced himself. The recruitment period was extended to April 30, 2023. Members were encouraged to share the information with friends and individuals they may come in contact with while doing Outreach. The information was sent to members through email. There is a link in www.USAJOB.gov . The Chairs will be contacted to schedule a time to have the Outreach meeting. It is open to all in TAP. Smith is looking forward to working with Leatham and members

Internal Communications

Leatham stated he and Charles Simineo will be working on getting notes drafted for what took place in the subcommittees meeting. It will be forwarded to Mills by April 18, 2023.

Action Items

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

- Post the approved November minutes to www.TAPSpace.org and forward to Kevin Brown for posting www.ImproveIRS.org
- Minutes for March will be shared in the Pre-reads to be approved during the FTF
- A response from IRS was received for Issue #51205, Questions from VITA volunteers seeking assistance with homeless individuals having trouble verifying their identity. That information will be forwarded to members



- O’Sullivan will work with Jimerson to set up date and time to meeting with the Screening Committee
- Questions sent to IRS on the records requirements. Conduct research for any additional information on record keeping
- O’Sullivan is available for questions

Roundtable

Mills stated she is looking forward to the Outreach meetings. She is excited to see all the great things TAC will be doing.

- Using the information that is there when talking about making improvement and changes to IRS, understanding how the IRS works www.IRS.gov is an excellent resource for information. Members were encouraged to go to www.IRS.gov when doing research

Jimerson expressed appreciation to members for their participation. Congratulations extended to Mills and Leatham on their selections. Jimerson will be reaching out to members to encourage participation. It is important that all members are active and working. She looks forward to hearing from members and seeing everyone at the FTF. Her door is always opened.

Closing

Jimerson officially closed the meeting at 2:43 PM, EST.

Next Meeting: Face-to-Face Meeting in Washington, DC

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