



**Taxpayer Assistance Center Improvements Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Thursday, May 18, 2023**

**Designated Federal Officer**

- Susan Jimerson TAP West Chief

**Attendance**

- |                     |                |            |
|---------------------|----------------|------------|
| • 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**

- |                      |                 |        |
|----------------------|-----------------|--------|
| • Anthony Jackson Jr | New Orleans, LA | Member |
| • Danielle Roberts   | Charlotte, NC   | Member |
| • Mikaela Binsfeld   | Saint Paul, MN  | Member |
| • Conner McFarland   | Augusta, ME     | Member |

**Staff**

- |                      |                              |
|----------------------|------------------------------|
| • Matthew O'Sullivan | TAP Program Analyst          |
| • Conchata Holloway  | TAP Program Analyst          |
| • Hannah Jair        | TAP Program Analyst          |
| • Annie Gold         | TAP Administrative Assistant |

**Members of the Public**

None

**Quorum**

Quorum was met.

**Welcome, DFO Report and National Office Report**

Susan Jimerson opened the meeting and welcomed everyone to the face-to-face meeting in Washington DC and call via MS Teams. Jimerson informed the members, the meeting will start on time and end on time. She provided an overview of the agenda. Susan explained our Acting Director, Frank Bustos was the DFO in another meeting; therefore, she will give the National Office Report along with her DFO Report.

Jimerson shared the following DFO & National Office Report:

- TAC member Denise Andrews resigned from the TAP. There are now nine members of the TAC, and five members constitutes a quorum, therefore quorum was met. Jimerson thanked the members for attending.
- On Wednesday the entire TAP met and heard from the NTA, DNTA, TXO office, LITC, DC LTA, and others. Jimerson stated if time permits the NTA will be stopping by the meetings to speak with the members
- Kurt VanMatre from Systemic Advocacy was also in attendance for part of the meeting.
- Internal Communications Committee (ICC) meeting will be on May 23, 2023, beginning at 12:00 PM, EST
- The Joint Committee Meeting, led by the TAP National Chair, will meet on May 30, 2023, beginning at 12:00 PM, EST for 1.5 hours
- More information will be shared regarding the Outreach Committee meeting.
- Be sure to send your receipts to Anne Gold for travel reimbursement
- Members were also encouraged to think outside of the box for ideas on how to help Taxpayers who come to the TAC for assistance.

### **Chair Report**

Cynthia “CJ” Mills had no official report but welcomed all the members to the meeting in Washington DC. She expressed her appreciation for everyone who showed up for the face-to-face meeting, because the 5 members attended, quorum was met, and the TAC members are able to conduct official business.

- Subcommittee leads were asked to provide their Newsletter input to Parampathu by May 23, 2023, Parampathu will send the input to Mills by May 24, 2023, and Mills will have the article to Jair and O’Sullivan by May 25, 2023.

### **Minutes Approval**

March 28, 2023, and April 11, 2023, meeting minutes were reviewed and approved by general consensus.

### **Public Comment**

None

### **Program Owner Report**

Matthew O'Sullivan informed the members Mejbeen Balsara, Program Owner Liaison was present in Washington DC; however, she was in another meeting. He will follow-up with her on any outstanding issues.

### **Subcommittee Reports**

#### **Issue 54682 Prohibited Items- Both Subcommittees**

Charlie Simineo stated he stopped by the TAC office in WY and there were no changes made so far. O'Sullivan stated a response was received from IRS for issue 54682 and solicited members to discuss.

- Leatham and Mills stated the response was confusing. Charlie stated taxpayers should be advised on what information is required prior to their appointments. Dan recommended the IRS clarify their response. The members made note that this is not a rebuttal but a request for clarification.
- Parampathu requested clarification for ID 2388, cell phone usage.

Subcommittee 1-Lead Charlie Simineo

- **Issue 66142 Annual Review of VITA/TCE Training Materials**  
O'Sullivan informed the members that everyone responded to participate. Balsara will provide us with a meeting time and date, O'Sullivan will send that out to the members.
- **Project Proposal 66143 Taxpayer Communication - Recordkeeping**  
O'Sullivan and members started doing research, O'Sullivan sent information out to the members. Mills noted IRS Publication 17 is a good resource. Additional research will be conducted.

Subcommittee 2-Lead Daniel Leatham

Daniel Leatham led the discussion regarding:

- **Issue 66142, Annual Review of VITA/TCE Training Materials.** Members are still waiting on notifications and invites. It is open to all subcommittee members
- **Issue 55988, Proposal to Allow Taxpayer to Fill Out a Form Stating Their Issue.** Subcommittee 2 is currently working on two proposals. 1. Reintroducing kiosks and 2. Creating a self-guide to set up virtual appointments yourself. **Issue 49686, closed related to Issue 55988**



Mills recommends possibly developing a questionnaire or form to get the taxpayer's perspective. Jimerson reminded members that TAC conducts their own surveys in their offices. Members agreed to revisit that.

### **Screening Committee**

Mills and Parampathu are on the screening committee. However, for this meeting, the entire Committee participated in the Screening Process. The Committee determined that all of the items on the first 47 pages of the May 1, 2023, Screening Report were either individual issues or tax law issues out of the scope of the TAP agreed to drop them.

The Committee then reviewed the following issues from the Parking Lot:

- **Issue 49686 Bellingham Office Needs Signs for New Location.** The Committee reviewed information provided from IRS concerning the signage at the location and the operating hours of the office. It was determined to close this issue and associate it with Issue 55988
- **Issue 51205 VITA Sites Being ID Verification Sites.** The IRS provided a response indicating that we do not have the authority to allow VITA to verify identity. It was determined to drop this issue.
- **Issue 55242 Open All Offices.** We have verified that the TAC offices are open on a normal schedule. It was determined to drop this issue.
- **Issue 55988 Allow Taxpayer to Fill Out a Form Stating Their Issue.** This is to be moved out of the Parking Lot and made an Active Project assigned to Sub-Committee 2.
- **Issue 59895 Unacceptable Process for Submitting Only Electronic Returns.** This was a concern about the verification process needed to accept electronically filed returns. Information provided by the IRS indicates that we cannot change the verification process. It was determined to drop this issue.
- **Issue 60022 Better System for Taxpayers to Pay Taxes in Installments.** The information provided was more to do with the verification process than actually setting up an installment agreement. The information IRS provided to set up a payment agreement is actually pretty good. It was determined to drop this issue.

The Committee then reviewed the following issues carried over from prior years:

- **Project 54683 Revision of Understanding Taxes.** This was the annual VITA Product Review conducted in 2022 by TAP members. The project has been completed and it was recommended that it be closed.
- **Project 44276 Review of TAC Tips.** This was a request from IRS in 2021 that the TAC Committee review the information posted on the television screens in TAC offices and make recommendations for changes and updates. The IRS did not adopt any of the specific recommendations made by the Committee. The Committee recommended accepting the IRS response and closing this project.

Leatham moved to accept screening report and Simineo seconded. The Committee voted to accept the report.

#### **Outreach-Led by Daniel Leatham**

- Be sure to update activity report daily or weekly
- Examples of Outreach, talk to the public on the airplane, tell them what TAP is about, offer speak up brochure, contact members of congress, groups that you are a part of, church, vita, Tax preparer. Outreach starts with you and in your community.
- CJ added, she wrote an article for American institute of parliamentarian, about meetings and records focused on FACA & FOIA requests. Because she talked about FACA was able to put TAP information in, the article was published in the Parliamentarian journal. If you're in a club or organization, be sure to include or mention TAP.
- Newingham added he have multiple connections and he would like to know where to get all the information and breakdown of TAP and what we members have access to and what they are allowed to share. He added, with his network of people including celebrities he's wanting to increase TAP visibility on social media.
- Members agreed that would be a great discussion for ICC

#### **Internal Communications Lead by Daniel Leatham and David Newington**

- Discussed the June Newsletter, Parampathu will write the article
- At the Last ICC meeting members talked about speak up brochure, more information to come
- Member input is important, and everyone is encouraged to participate and attend the meetings



- Social media-all TAP members should like and follow Facebook and look at other social media such as Instagram and Twitter
- Suggestions for the Newsletter: use key words & being consistent monthly, etc.

### **Action Items**

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

- Follow up with Balsara for Issue 66142
- Send Brown approved meeting mins for posting
- Issue 54682 send questions to IRS for clarification
- Issue 66143 continue research
- Close issues from screening report as approved
- Follow up on Issue 41122 and update committee members.

### **RoundTable**

O'Sullivan thanked members for attending, because of them TAC was able to conduct official business

O'Sullivan thanked Jair and Gold for being on the call and on camera every day at 6:00 am Pacific time

### **Closing**

Jimerson officially closed the meeting at 3:20 PM, EST.

**Next Meeting: Tuesday, June 13, 2023  
2:00 PM EDT**

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