

**Taxpayer Assistance Center Improvements Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, June 13, 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

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

Visiting Member

- Eugene Lillie West Deptford, NJ 2023 TAP Chair

Staff

- | | |
|----------------------|-------------------------------|
| • 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. Appreciation was expressed to members who attended the FTF.

- Work is being done with the Director to re-engage members who are not participating and the ones who are not engaging they are being referred to the Director and up the line for determination what will happen with members not participating. Members were assured work is being done to ensure full participation by members assigned to TAP
- ICC will have their monthly meeting on June 20, 2023, beginning at 12:00 PM, EST. Hannah Jair is the Analyst with Matthew O'Sullivan as her back-up
- June 21, 2023, beginning at 11:00 AM, EST the Outreach committee will have their meeting lead by the National TAP Vice Chair
- The Joint Committee will have their meeting on June 26, 2023, at 3:00 PM, EST. It is led by the National TAP Chair, Eugene Lillie

Chair Report

Cynthia Mills thanked all members and TAP Staff for their attendance during the FTF meetings. A lot was accomplished in work and team building.

- The Chair presented a workshop along with Conchata Holloway on writing a referral
- The Chair also presented a flyer for Outreach in the Pittsburgh area during their problem-solving day event that was held on June 08, 2023. He will be participating in the Congressional Outreach session on June 28, 2023
- The Chair presented proposed amendment to the TAP By Laws in March and waiting for the outcome

Minutes Approval

TAC reading Minutes for May 18, 2023, were approved with corrections by general consent.

Public Comment

None

Program Owner Report

Mejbeen Balsara introduced herself to the committee but was having some technical issue with TEAMS.

Subcommittee Report

Subcommittee 1

Charlie Simineo shared his understanding is that:

- Issue #66142, VITA TCE Training Materials Project met regarding the F4012 Volunteer Resource and F6744 Test Re-Test
- Subcommittee 1 name was submitted, and they have three days in July to work through Publication 4491
- Issue #66143, Taxpayer Communications Record Keeping Subcommittee 1 is working through the issues and will be getting ideas and thoughts to

make record keeping more promising and for Taxpayers to know where and how to look

- Mills added they will be looking at what is on www.irs.gov and draft language to include items such as: Child Tax Credit, Earned Income Credit, Identity Theft to address those recordkeeping issues in addition to what IRS currently has available
- Matthew O'Sullivan added he has been working with Rosalind Matherne. They are combining both subcommittees to have a couple of SMEs to show up and provide recording keeping briefings

Subcommittee 2

Daniel Leatham stated Subcommittee 2 is the same for:

- Issue #66142, Annual Review of VITA TCE Training materials. Subcommittee 2 will participate in the meetings for training material 4491.
- O'Sullivan added he received a response from IRS and will share with the committee after the call for 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 is doing research; 1. Reintroducing KIOSH and 2. Implementing an online portal for Taxpayers to be able to create appointments

New Issues Screening Committee

Joseph Parampathu shared the following

- The Screening Committee had forty-nine issues. They recommended to accept two of the issues and take on as issues; three were recommended merging with Issue #55988; four issues were moved to the Parking Lot for further research; five were referred to other committees; two they are currently working and the remaining issues they recommend closing. Issue #66215, assign to Subcommittee 1 and Issue #66145, assign to Subcommittee 2. Issue #62231 and #66217, needing additional research, keep and place in the Parking Lot

The five Issues to be referred to other committees: #66943, Change the size of the signature block to TFP; #66471, Have an individual fax number available to the public refer to TCC and #63796, IRS portal for abatement request to TCC; #64762, Helpdesk chat assign to TCC; #65351, E-Filing for Taxpayers assign to Special Projects. All the remaining issues Subcommittee 2 recommended to close

Charles Simineo moved to accept the Screening Report and Daniel Leatham seconded

Decision: Full Committee Consensus accept the Screening Report

Outreach Report

Daniel Leatham stated the Outreach Committee has not met since the FTF meeting. Their next meeting is scheduled for June 21, 2023.

- Members were encouraged to complete their Outreach reports. He is available for questions and encouraged members not to hesitate to reach out to him
- Members were encouraged to share any activities they may have, any events with their LTAs
- Leatham shared his experience while on a flight where he shared information about TAP and is documented as Outreach
- Jimerson encouraged members to document hours departing from home to the time they return from travel all counts as Outreach
- Members having any problems with www.TAPSpace.org contact O'Sullivan. Simineo suggested members may want to continue to use the spreadsheets until the issue has been resolved

Internal Communications

Leatham stated ICC will meet on next week to have their June meeting. They will discuss the SpeakUp Brochures to finalize for the year and discussions to update with actual photos for next year.

- There is a project to give and uplift to www.TAPSpace.org and www.ImproveIRS.org
- ICC is seeking members to be a part of the admin for Facebook page
- The Newsletter was sent out quickly last month. Mills will submit the article for June and Leatham will do the submission for next month

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
- Update the inventory report based off of the Screening Report and run a new report
- Send information out to members today that was received for Issue #55988
- Share invite to attend the next subcommittee meeting where there will be a SME for questions and explain the response
- Follow up on questions waiting for answers.
- Share activity data with members by the end of the month
- Put referral forms for items working on in draft form to help member get a head start
- 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.

- Lillie stated he is waiting for a copy of the recommendations on the By Laws with comments by June 16, 2023, from the Frank Bustos. TFPL asked for a conference to have the Strategic Planning Committee come

- and share updates. He will work on getting invites to members to attend the meeting on extending hours of the TAC
- Mills encouraged members to read information that is posted on what is being worked on
 - Leatham suggested to discuss combining the subcommittees. Mills and Jimerson suggested during another meeting for discussions
 - Lillie suggested lowering quorum by reducing by one member. Mills stated during the next subcommittee meetings members may want to consider
 - Leatham reminded members the next subcommittee meeting will be held on July 5, 2023

Jimerson thanked members for their attendance and participation.

Closing

Jimerson officially closed the meeting at 3:00 PM, EST.

Next Meeting: Tuesday, July 11, 2023

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