

**Taxpayer Assistance Center Improvements Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Tuesday, July 11, 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     |
| • Danielle Roberts  | Charlotte, NC  | Member     |
| • Charlie Simineo   | Cheyenne, WY   | Member     |

**Member Absent**

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

**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. Appreciation was expressed to members who attended the FTF.

- The Joint Committee will have their meeting on July 17, 2023, at 3:00 PM, EST. This meeting is a makeup meeting
- ICC will have their meeting on July 18, 2023, beginning at 12:00 PM, EST

- The Outreach committee will have their meeting July 19, 2023, beginning at 11:00 AM, EST. The Project Committee Chairs will be in attendance
- The Joint Committee will have their meeting on July 24, 2023, beginning at 3:00 PM, EST
- Members were reminded as TAP is in mid-season, updates will be share on what the committee members are doing. They were encouraged to continue to do good work
- TAP is in the recruitment season. Interviews are being conducted and are going well. There have been some very outstanding candidates interviewed

### **National Office Report**

Frank Bustos welcomed everyone and shared the following:

- Members were reminded of the Notices that went out to Taxpayers in California for payment without giving them allowances of extensions. Corrective Notices have been sent out to those Taxpayers. Members were encouraged if contacted in their area about this to let the Taxpayers know, it was sent in error and the corrected Notice should be arriving from IRS assuring they have time to file and time to pay
- IRS submitted a report to Congress. They are evaluating the Direct File Option for Taxpayers. Steps are being taking to begin a pilot project for 2024 Filing Season following a directive from the Treasury Department. The report to Congress was required by Inflation Reduction Act

### **Chair Report**

Cynthia Mills welcomed everyone to the meeting. She stated the following:

- There is a lot going on and TAC; a lot of energy, enthusiasm that shows TAC has reach its stride. Thank you to members and to the IRS Staff
- Mills participated in a virtual Congressional Outreach event with her LTA with the Pittsburgh, Pennsylvania office. The participants included TAS, SPEC talked about VITA, service representatives for LITC, and Pittsburgh Congressional office representatives. There were six potential TAP issues identified. Two of them were relative to the appointment process and the assistance centers. Mills will follow up on the recommendations

### **Minutes Approval**

TAC meeting minutes for June 13, 2023, were approved with no objections  
Charlie Simineo moved

### **Public Comment**

None

### **IRS Responses**

Mills shared the following:

Issue #54682, TAC Prohibited Items, Subcommittee 1 and 2 met with IRS SME and discussed both IRS rationale and TAP rationale. It was decided the issue should be decided at their next meeting to rebut or accept IRS response.

### **Program Owner Report**

Mejbeen Balsara stated she had nothing to report at this time. Members were thanked for their recommendation and reminded to forward any questions Rosalind Matherne.

### **Subcommittee Report**

#### Subcommittee 1

Charlie Simineo stated three members from different committees will be meeting on today on Publication 4491. They have two days of meetings remaining. Discussions are going well. Daniel Leatham offered to assist if needed.

- They are still waiting for responses on Publications 4012, 6744, 5101, and 4961. Simineo is anticipating they have been completed or in the final stages
- Issue #66143 Subcommittee 1 worked on this issue last week as a group. They anticipated an SME would be there for questions. A representative did attend but could not answer questions. A SME has been requested to attend the next subcommittee meeting. Mills shared information that helped members to know what was expected

#### Subcommittee 2

Daniel Leatham stated Subcommittee 2 met with Subcommittee 1 and discussed the following:

- Issue #55988, Taxpayers not being able to access TAC centers to for appointments. During the meeting on July 05, 2023, it was determined to recommend closing this issue with recommendations and refer the recommendation over to the GAO Report and the National Taxpayer Advocate's report. It covered the creation of a portal and adding a kiosk
- Mills added the GAO Report covers some of the issues TAC has been discussing including artificial intelligence, kiosk, etc. When IRS responses to GAO Report, they respond to Congress. Finding out the status of IRS response is what the committee will follow up on

### **New Issues Screening Committee**

Joseph Parampathu stated the Screening Committee had seventeen issues. Fifteen issues were closed. One issue was referred to a different committee and one was placed in the Parking Lot:

- Issue #67378, one reason for placing in the Parking Lot was it was relating to issues on rescheduling TAC appointment
- Issue #67036 was referred to Special Projects Committee. It refers to Free File and accountability for VITA
- The remaining issues were closed

- Matthew O'Sullivan added his appreciation to Parampathu and Mills for agreeing to meet and get the information out on time

**Decision: Full Committee Consensus accept the Screening Report**

**Outreach Report**

Daniel Leatham stated the Outreach Committee met on June 21, 2023. They discussed the following:

- Ongoing questions to the Facebook page, adding administrators and having members willing and able to create content and post to the page
- Training will be provided for the individual leading this portion of the Outreach committee
- Issues with [www.TAPSpace.org](http://www.TAPSpace.org) were discussed. Members were advised to contact the Analyst with any issues
- Some of the issues have been resolved and members are able to upload hours on [www.TAPSpace.org](http://www.TAPSpace.org)
- The Outreach Committee submitted a request to speak with each member of the Panel for any Outreach they may be participating in and to send Parampathu a message informing him of the Outreach activity
- Members were reminded if they will be setting up a booth during an Outreach event, to send an Email message to Kevin Brown and O'Sullivan to ensure access to the TAP Banner along with posters or any other materials available
- The SpeakUp Brochures have been approved and going to the printers
- Mills asked if obtaining TAP Business Cards and how long would the process take. Jimerson added to send a virtual link to [www.ImproveIRS.org](http://www.ImproveIRS.org) that has the listing of members for each state until actual cards are delivered. Bustos added Matherne followed up with Brown and will provide an update on the status
- Jimerson will follow up on the actual timeline for receiving requested items in order to plan for Outreach events

**Internal Communications**

Leatham stated ICC had discussion on:

- Adding Administrators to the Facebook page, training
- David Newingham added they also discuss social media. There are some members who are no on Facebook. Members are not sure what to post on social media. Encouragement was expressed to post daily onto social media to get recognition out there.
- Members were encouraged to send Outreach information and Newingham will post it. Mills ask for a written recommendation from Newingham to present to the committee. Members were encouraged to volunteer to work with Newingham on this. Mills volunteered to assist
- O'Sullivan pointed out Mills and Daniel Roberts will work together to get the Newsletter article submitted by July 25, 2023

- Leatham and Simineo will send a synopsis to Mills and Roberts

### **Action Items**

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

- Post the approved June 13, 2023, minutes to [www.TAPSpace.org](http://www.TAPSpace.org) and forward to Kevin Brown for posting [www.ImproveIRS.org](http://www.ImproveIRS.org)
- Update the inventory report based off of the Screening Report and continue to do research putting in form format for members to submit in the correct format
- Reminder to member to share any issues they may have with [www.TAPSpace.org](http://www.TAPSpace.org) and share with IT for resolution

### **Roundtable**

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

- Bustos asked if Newingham looked on [www.TAPSpace.org](http://www.TAPSpace.org) would he be able to see the accepted recommendations. Jimerson stated all of the Annual Reports are posted in [www.ImproveIRS.org](http://www.ImproveIRS.org) to view the accepted recommendations. Send all information to O'Sullivan who will elevate to Communications area for approval to posting

Jimerson thanked members for their attendance and participation and information will be share on the timeline for receiving SpeakUp Brochures, Business cards, or any items requesting in order to have for upcoming Outreach events.

### **Closing**

Jimerson officially closed the meeting at 1:52 PM, EST.

**Next Meeting: Tuesday, August 08, 2023  
2:00 PM EDT, 1:00 PM CDT, 12:00 PM MDT, 11:00 AM PDT**

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