



**Taxpayer Assistance Center Improvements Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, August 08, 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

- Danielle Roberts Charlotte, NC Member

Staff

- Cedric Jeans Acting TAP Director
- Matthew O’Sullivan TAP Program Analyst
- Hannah Jair 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. The following updates were provided:

- ICC will have their monthly meeting on August 15, 2023, beginning at 12:00 PM, EST. Hannah Jair will be leaving TAP and no longer the Analyst for ICC, but Matthew O’Sullivan will be resuming the position of Analyst overseeing ICC.
- August 16, 2023, beginning at 11:00 AM, EST the Outreach committee will have their meeting. Angela Madison, TAP National Vice Chair is the lead for this committee. This is the meeting of TAP Vice Chairs, and their discussions are on different topics around Outreach.



- August 28, 2023, the Joint Committee will have their monthly meeting beginning at 3:00 PM, EST. All referral completed by the project committees are forwarded to the Joint Committee for approval before going to IRS

National Office Report

Cedric Jeans welcomed everyone and shared the following:

- TAP Staff changes includes Frank Bustos' detail with TAP ended and Jeans will be the Acting TAP Director until a permanent director has been selected. Robert Rosalia will be the Acting Manager for TAP East. Kelvin Johnson has taken over the Analyst covering Notices and Correspondence Committee behind Ann Tabat
- The Joint Committee Planning Session is scheduled for August 29, 2023, and August 30, 2023. More information will be shared. The committee will begin to strategize projects for the 2024 TAP Year. Member with ideas and or thoughts were challenged to start and to share them with Cynthia Mills, TAC Chair
- A lot of requests have been coming in from the National Taxpayer Advocates team, her most serious problems analysts. TAP has been asked to do some focus groups some serious topics such as the International ITIN issues. Volunteer solicitation will be sent out for interested members wanting to participate in the focus group. The meeting will be held on September 02, 2023. The time is tentatively set for 2:00 PM, EST but will be confirmed. Members were encouraged to participate and share their interest with O'Sullivan
- IRS has announced plans to almost go paperless. Their plan is to digitize all paper Returns upon receipt. This will be a good initiative and will be posted on www.TAPSpace.org
- Members were encouraged to push referral through as the TAP year is coming close to the end. Work has begun on the Annual Report. Members comments and ideas were encouraged

Chair Report

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

- Mills participated in a virtual meet and greet Outreach event on July 31, 2023, with her LTA from Philadelphia, Pennsylvania area and the National Taxpayer LITC Advocacy Analyst. They had discussions about the need to identify community partners to do effective Outreach. They will have a follow up meeting later in the month
- A couple of resources were shared with TAP Analyst that may be useful to TAP when researching TAP issues on IRS websites. The resources were IRS Oversight Organizations and How to research CP Notices.
- Members were thanked for their committee work and TAP Staff for their support and assistance

Minutes Approval

TAC meeting Minutes for July 11, 2023, were approved with corrections. Charlie Simineo moved to approve with no objections.

Public Comment

None

IRS Responses

Mills shared the following:

Issue #54682, TAC Prohibited Items, had three recommendations: one resolved by IRS prior to elevation, one IRS adopted, and one required clarification on the IRS response. After the meeting with the SME, it was decided Subcommittee 2 would develop the recommendation to rebut or to accept IRS response. Report out during the Subcommittee report.

Program Owner Report

Mejbeen Balsara stated she had nothing to report at this time and she is waiting for recommendations from the committee. O'Sullivan inquired on the committee's request for written guidance and a written explanation. Mills added the committee has requested clarification on Issue 66143 for what is the issue. Mejbeen asked if email request for information be shared with TAP manager and Analysts.

Subcommittee Report

Subcommittee 1

Charlie Simineo stated Subcommittee 1 is waiting for information on

- Issue #66143. They need to know what the issue is and what is expected of them. It has been three months since a SME was promised. Mills and Simineo have conducted research and have some recommendations and forms. They are waiting to hear what IRS is wanting the subcommittee to address to move forward. Mills added she will follow up with Mejbeen, Jimerson and the Analyst to report during next month's meeting
- Issue #66142, VITA TCE Training Materials, a review of Publication 4491 during last month meeting. David Newingham will share the write up with Simineo to be forwarded for the Annual Report. It was helpful and useful to be involved
- Publication 4012 is in the final stages.
- There has been no input in Publication 6744, Test Retest nor 5101, Intake Interview Quality Review. IRS has scheduled training for the site coordinator scheduled for August 11, 2023. Simineo will be participating as the site coordinator
- Publications 4961, Volunteer codes of standards there has been no input from TAP. It is moving along. Simineo will send information to Newingham
- Subcommittee 1 reviewed the Parking lot issues. They will be working Issues #61961 and #66217, both are dealing with the Disabled Accessing the TAC Offices

Subcommittee 2

Daniel Leatham stated Subcommittee 2 met on last week and discussed the following:

- Issue #54682, Prohibited Items, Subcommittee 2 received IRS response to 2388 Notification on Appointments including no prohibited items. Their response is to not adopt. Subcommittee 2 reluctantly accept IRS response.
Decision: Full Committee Consensus to accept Subcommittee 2 recommendation to accept IRS recommendation as Not Adopted
- Issue #55988, Taxpayers not being able to access TAC centers for appointments. Subcommittee 2 sent a draft proposal for recommendation to members for input. Draft is anticipated to be finalized for next meeting
- Subcommittee 2 will be working two new issues: #62231, Extended TAC Hours and #66145, VITA Site Parameters. They will be conducting research on these issues to be ready for discussion during next month's meeting
- Joseph Parampathu brought Issue #68481, Allowing Members of the Public to join Email Lists for upcoming TAP meetings. Subcommittee 2 recommended this issue to assigned to Internal Communications Committee.

New Issues Screening Committee

Joseph Parampathu stated the Screening Committee had fourteen issues. Two issues will be merged and accepted. One issue was recommended to be merged into an existing issue. Two were to be referred to different committees. Nine issues to be closed:

- Issue #67853 and #67964, Both are about TAC Appointments. Both Taxpayers were having the same issue where IRS cancelled their appointments. They were having issues rescheduling the appointments. The Screening Committee recommended merging and accepting both as a new issue. Matthew O'Sullivan will provide research on how often appointments get cancelled, what type of issues was the reason to be cancelled, and what is the process to get rescheduled
- Issue #67858, TAC Hours, the Screening Committee recommended merging this issue with Issue #62231, Longer TAC Hours.
- Issue #68079, Surviving Spouse having problems getting their Returns Back. This issue was recommended to be transferred to Special Projects Committee
- Issue #68481, New Email Issue was recommended to be transferred to ICC.

Decision: Full Committee Consensus accept the Screening Report

Outreach Report

Daniel Leatham stated the Outreach Committee meeting revolved around the Facebook Page. They were trying to get additional resources and posting on the

page. The other discussions involved www.TAPSpace.org inaccessibility trying to optimize it.

- The Outreach Committee encouraged members to conduct Outreach Activities in their areas
- Two members provided feedback from the Tax Forums.
- Leatham is attending the Tax Forum in the Washington, DC area. He noticed a lot of confusion between the Taxpayer Advocate Service and Taxpayer Advocacy Panel. They are receiving a lot of good recommendations for referrals
- Some recommendations will come from the forums

Internal Communications

Leatham stated during the ICC meeting, they had discussion on:

- The revised Speak Up Brochure that has been approved and sent to publishing. This issue has been officially closed
- The Facebook Page is still in need of volunteers who are on Facebook to promote some of the content and are interested in posting
- Conversations on www.TAPSpace.org additions, concerning better useability with CSO
- Simineo mentioned at the VITA site, Taxpayers are given Speak Up Brochures. Leatham mentioned to ICC the suggestion of having order and share Speak Up Brochures as a part of their request for supplies. Jimerson responded to the question of would it be ok to print the Speak Up Brochures and share them. Handing out the brochures is a good way of getting the word out. TAP Staff will have to order the brochures. Members were encouraged to continue asking for the brochures. Addition information will be shared with members

Action Items

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

- Reminder to members, O'Sullivan will be the Analyst over the ICC and the Newsletter
- Post the approved July 11, 2023, minutes to www.TAPSpace.org and forward to Kevin Brown for posting www.ImproveIRS.org
- Input the recommendations based on the Screening Report
- Send draft referral #55988 to SA and Attorney Advisor for their input
- Issue # 54682 concerning Prohibited Items will be closed out of the system
- Continue research on the other topics
- Issue #66143, will be worked
- Pull the write ups on Issues #66215 and #66145 then forward to members to start preliminary planning



Roundtable

Mills asked for any comments for the Roundtable.

- Simineo asked if the SpeakUp Brochures available, will they be mailed to members and the excel spreadsheet for the Activity Report was not included. Also, on the filing in www.TAPSpace.org the filing uncertain without reading through everything. Jeans asked if he would do a write up and forward to the Staff for clarification. Simineo will send the information
- Mills welcomed Anthony Jackson, Jr back to the committee

Jimerson thanked Mills and members for their attendance and participation. She is encouraged members to keep up the good work. Information requested will be followed up on.

Closing

Jimerson officially closed the meeting at 2:58 PM, EST.

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

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