



**Taxpayer Assistance Center Improvements Project Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Tuesday, September 12, 2023**

**Designated Federal Officer**

- Rosalind Matherne Acting, Designated Federal Officer

**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 |

**Visiting Member**

- Eugene Lillie West Deptford, NJ National TAP Chair

**Staff**

- |                      |                               |
|----------------------|-------------------------------|
| • Matthew O'Sullivan | TAP Program Analyst           |
| • Conchata Holloway  | TAP Program Analyst           |
| • Rosalind Matherne  | TAP Program Analyst           |
| • Annie Gold         | TAP Administrative Assistant  |
| • Tamikio Bohler     | W&I Operation Support Program |

**Members of the Public**

None

**Quorum**

Quorum was met.

**Welcome and DFO Report**

Rosalind Matherne shared the following updates during Susan Jimerson's absence:

- September 19, 2023, ICC will have their monthly meeting beginning at 12:00 PM, EST.
- September 20, 2023, Outreach will have their monthly meeting beginning at 11:00 AM, EST.

- September 25, 2023, the Joint Committee will have their monthly meeting at 3:00 PM, EST.

### **Welcome and National Office Report**

Fred Smith opened the meeting and welcomed everyone to the call. The following updates were provided:

- September 26, 2023, TAP Focus Group for Appeals will have their meeting beginning at 2:00 PM, EST. Members were sent an email to respond.
- Susan Jimerson sent an email to members asking for volunteers to assist with the Annual Report. Members interested were asked to respond to the email sooner than later.
- The TAP Staff will be unavailable on next week for training in Dallas, TX. Responses to emails will be delayed and members were asked to be patient when waiting for a response.
- There are two Full Committee meetings remaining for TAP year 2023. Members were encouraged to continue the momentum in pushing referrals through.
- Continue to complete all Activity Reports. Members needing assistance with submission or completion were encouraged to alert the Staff. Hours entered will determine the type of Presidential award to be issued for proper recognition at the end of member's third year term.

### **Chair Report**

Cynthia Mills welcomed and thanked everyone for attending the meeting. She shared the following updates:

- Mills and her Philadelphia LTA met with representatives from the Philadelphia area LITC and including the Directors of Philadelphia Legal Assistants, Philadelphia Law School, Tech University Law School. They agreed to plan a Problem-Solving Day for the Philadelphia area.
- It was proposed to the Joint Committee on August 28, 2023, form an Ad Hoc By Laws Committee. Thank you was expressed to Joseph Parampathu for his being the TAC representative for the committee and Mills will be the Chair.
- Mills participated in the Joint Committee Planning Session held on August 29, 2023, where she led a round table discussion on the year end strategies. Thank you was expressed to Daniel Leatham for taken day two of the planning session.
- September 01, 2023, Mills attended the TAP Quarterly Meeting. It was a very informative meeting.
- Thank you expressed to the Full Committee for all of the hard work performed this year and to the IRS Staff for continual support.

### **Minutes Approval**

August 08, 2023, TAC Minutes were approved as corrections.  
Charlie Simineo moved with no objections.

### **Public Comment**

None

### **Program Owner Report**

Tamikio Bohler stated she was filling in for Mejbreen Balsara. She shared the following updates on two items; one received an extension on the recommendation by IRS.

- 62742 was extended to October.
- 52596 was extended to November 07, 2023.
- 52664 was sent to LB&I from TAS.

### **Subcommittee Report**

#### Subcommittee 1

Charlie Simineo stated Subcommittee 1 met on last week. They have completed all they were able to on the training materials for this year.

- Issue #66142, VITA TCE Training Materials; Mills, David Newingham and Simineo participated in Pub 4491. The other Publications: 4012, 6744, 5101, 4961 timely invitations for participation were not received. Their recommendation is to close as completed for the year. Simineo will complete the draft for the Annual Committee and forward to Matthew O'Sullivan to be added to the Annual Report.

**Simineo made the motioned to close and Mills seconded.**

**Decision: Full Committee Consensus to close Issue #66142**

- Issue #66143, Subcommittee 1 received response from SPEC to drop the issue. Subcommittee 1 agreed they have done a lot of work on the issue and decided to forward the proposal on to SA and the Attorney Advisor. O'Sullivan agreed the justifications were added and ready to move forward.

#### Subcommittee 2

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

- Issue #55988 and #59976 were combined. Subcommittee 2 received feedback from SA and the Attorney Advisor. They accepted the recommendation received. Subcommittee 2 recommendation is to move the issue forward to the Joint Committee.

**Leatham motioned and David Newingham seconded.**

**Decision: Full Committee Consensus move Issues #55988 and #59976 to the Joint Committee for their approval**

- Subcommittee 2 will be working two new issues: Issue #62231, Extended TAC Hours and Issue #66145, VITA Site Parameters. They will be

conducting research on these issues to complete the proposal for each issue.

### **New Issues Screening Committee**

Joseph Parampathu stated the Screening Committee had six issues. Four issues were recommended to be closed and two issues were moved to Special Projects. The two issues that were moved to Special Projects:

- Issue #68820, Masking EIN Numbers for Tax Professionals on Tax Returns
- Issue # 68844, 1099K
- Both issues Special Projects were excited to have

Parampathu moved for approval and Charles Simineo seconded.

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

### **Outreach Report**

Daniel Leatham shared the following updates for the Outreach Committee:

- August 16, 2023, Outreach Committee had their meeting.
- The meeting scheduled for next week was cancelled due to TAP Staff training sessions. Fred Smith will send members an email message with the rescheduled date and time.
- Discussions were held on Problem Solving days for the elderly, meeting with block parties and LITC, meeting with the District Liaison and members of Congress.
- The National Tax Forums are down to two remaining.
- Members were encouraged to spread the word through Outreach to raise the awareness of TAP.
- Joseph Parampathu brought an issue to the committee that was discussed during the Outreach meeting. The issue was about getting the message to Taxpayers on how to join the TAP calls and make them aware of what TAP is working on.
- Discussions were held on working methods of areas in Outreach that could be passed on to new members. This would be a good way of providing tools to new members on how to perform Outreach.
- Members were encouraged to communicate with Leatham any ideas on doing Outreach or need information on how to do Outreach.
- Mills added how critical it is to try and have Outreach activities passed on to TAP members coming behind current members.
- David Newingham suggested to have the information placed on [www.TAPSpace.org](http://www.TAPSpace.org) and it was suggested to bring this up during the next ICC meeting.
- The Outreach Committee is looking to get an Outreach contact list started especially for the third-year members to pass on to new members.

### **Internal Communications**

Leatham shared the following updates for ICC:



## Taxpayer Advocacy Panel

20 YEARS OF IMPROVING THE IRS

- ICC had their meeting on August 15, 2023. They discussed a lot of issues. It was a good meeting.
- Discussions centered around the Facebook page, hosting the training, determining what content will appear on the page, adding contact information on individual profile in [www.TAPSpace.org](http://www.TAPSpace.org) and meeting in public or private. They discussed adding phone numbers and email addresses to profiles, and a referral tracking database.
- Issue #68481, allowing members of the public to have access to join TAP meetings was discussed. This is the issue Parampathu brought to the committee. Additional research is needed to understand better how it will work and which committee it will be assigned to.
- The issue brought by Simineo on allowing SpeakUp Brochures to be ordered by VITA TCE sites was discussed and it was determined to table the discussion until the next meeting.
- It was decided that Mills and Leatham would write the articles for the TAP Newsletter through the remainder of the year. Mills will do October submission.

### **Action Items**

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

- TAP Staff will be unavailable on next week. Conchata Holloway will conduct the ICC meeting while O'Sullivan will be in travel status.
- Post the approved August 08, 2023, minutes to [www.TAPSpace.org](http://www.TAPSpace.org) and forward to Kevin Brown for posting [www.ImproveIRS.org](http://www.ImproveIRS.org).
- Close Project #66142 as completed.
- Elevate Issue #66143 to management to forward to the SA and Attorney Advisor for feedback.
- Update SAMS with Referral #55988 and send to Holloway to place on the Joint Committee Agenda.
- Update the inventory based on the approved New Issue Screening Report
- Continue research other items.
- Both subcommittees will meet during the normal time scheduled for Subcommittee 1.

### **Roundtable**

Mills asked for any comments for the Roundtable.

- Joseph Parampathu is the representative for TAC with the Ad Hoc By Laws Committee. The committee is composed of one member from each TAP Project committee excluding the Chair and the Vice Chair. There will be an email message sent to members asking for ideas and suggestions. There will be a template with instruction on how to do this. They are looking for proposed amendments to the By-Laws. Members were encouraged to put on their thinking caps and Mills expressed they are looking forward to suggestions.
- Simineo suggested a transition meeting for the members coming aboard would be helpful. Mills agreed the idea was good.



## Taxpayer Advocacy Panel

20 YEARS OF IMPROVING THE IRS

- Leatham suggested a draft of notes for incoming members and committees with open issues being worked and the status would be helpful.
- Lillie expressed appreciation and thanked the members for the work all year and the quality of the referrals. He encouraged members to keep up the good work, pressing to the end and make life better for Taxpayers.

### **Closing**

Matherne officially closed the meeting at 2:49 PM, EST.

**Next Meeting: Tuesday, October 10, 2023  
2:00 PM EDT, 1:00 PM CDT, 12:00 AM MDT, 11:00 AM PDT**

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