

**Taxpayer Assistance Center Improvements Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, October 10, 2023**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer

Attendance

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| <ul style="list-style-type: none"> • Daniel Leatham • David Newingham • Joseph Parampathu • Charlie Simineo | <ul style="list-style-type: none"> Shrewsbury, MA Henderson, NV Irvine, CA Cheyenne, WY | <ul style="list-style-type: none"> Vice Chair Member Member Member |
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Member Absent

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| <ul style="list-style-type: none"> • Anthony Jackson Jr • Cynthia Mills • Danielle Roberts | <ul style="list-style-type: none"> New Orleans, LA Glenside, PA Charlotte, NC | <ul style="list-style-type: none"> Member Chair Member |
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Visiting Member

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| <ul style="list-style-type: none"> • Eugene Lillie
Chair | <ul style="list-style-type: none"> West Deptford, NJ | <ul style="list-style-type: none"> National TAP |
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Staff

- | | |
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| <ul style="list-style-type: none"> • Matthew O'Sullivan • Conchata Holloway • Rosalind Matherne • Annie Gold | <ul style="list-style-type: none"> TAP Program Analyst TAP Program Analyst TAP Program Analyst TAP Administrative Assistant |
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Members of the Public

None

Quorum

Quorum was met.

Welcome and DFO Report

Susan Jimerson opened the meeting by welcoming members to the call. Cedric Jeans could not be on the call today. The National Office Report will be shared next month. Cynthia Mills could not be on the call today and Daniel Leatham will cover the Chair report. A brief overview of the agenda was shared along with the following information:

- There is one meeting remaining before the end of the TAP year.

- Members were informed there is a push to get all of the referrals completed and forwarded to the Joint Committee before their final meeting in November.
- Information will be shared with members if there is a government shutdown. A contingency plan is being worked for a possible early meeting for the Joint Committee to have their meeting if the shutdown should occur
- October 17, 2023, ICC will have their monthly meeting beginning at 12:00 PM, EST
- October 18, 2023, Outreach will have their monthly meeting beginning at 11:00 AM, EST
- October 23, 2023, the Joint Committee will have their monthly meeting at 3:00 PM, EST

Chair Report

Daniel Leatham provided the Chair report during Cynthia Mills absence. He welcomed and thanked everyone for attending the meeting.

- The Chair is waiting for information on two cases listed in the Annual Report from last year that has not been closed. Follow up on the closure of these cases will be conducted
- The end of 2023 TAP year is approaching. Members were encouraged to forward their notes to the Annual Report Committee to be added to the Annual Report. Each member was asked to submit a couple of sentences highlighting Outreach, research, projects worked or anything they may want to be included

Minutes Approval

September 12, 2023, TAC Minutes were approved as submitted. David Newingham moved, and Joseph Parampathu seconded.

Public Comment

None

Program Owner Report

Not available during the call.

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 66143, Subcommittee 1 is waiting for a response from SA and the Attorney Advisor.
- The project proposals will be worked in November. O'Sullivan has those two issues concerning the disabled Taxpayers and the TAC offices with the VITA programs. Matthew O'Sullivan added he will put the draft

together for the full committee to review to make changes if needed. He will continue to do research. Members were encouraged to reach out to O'Sullivan with any changes.

Subcommittee 2

Leatham shared the following updates for Subcommittee 2:

- Issue 40122, pending IRS update. It is still in the thirty-day response time. They anticipate finalizing this issue during November's meeting
- Issue 66145, VITA Site Parameters is in the research stage
- Issue 62231, Extended TAC Hours is assigned to Subcommittee 2 and is in the research stage. Subcommittee 2 anticipates forwarding this issue to SA and the Attorney Advisor by the end of the year
- One referral has been forwarded to the Joint Committee for their review

Screening Committee Report

Joseph Parampathu shared the following updates for the Screening Committee: There were 32 issues recommended for assignment, 6 issues were referred to other committees, 1 placed in the Parking Lot for further research and 1 to be worked by this committee. The remaining 24 will be closed as individual issues.

- Issue 68844, 1099K was referred to Special Projects
- Issue 68985, Trouble locating the telephone number to call was assigned to Taxpayer Communications Committee
- Issue 69097, Responses to IRS phone call after submitting three 911 forms and continue to have issues was assigned to Toll Free Committee
- Issue 69098, Partnership Income Debt Collection Notices and CP140 was assigned to Notices and Correspondence Committee
- Issue 69043, TBOR Violated was assigned to Taxpayer Communications Committee
- Issue 69107, Request for PDF Letter showing the number of Returns submitted on the PTIN was assigned to Notices and Correspondence Committee
- Issue 68953, Increasing LITC Access Hours was placed in the Parking Lot
- Issue 68954, Senior Hours for TAC recommend partially merging with Issue 66231, Longer TAC Hours
- Issue 66231, VITA and TCE TAC Hours as a separate issue. They will keep the VITA portion
- The other issues the Screening Committee recommended closing Leatham moved to approve, and Simineo seconded

Decision: Full Committee Consensus accept the Screening Report

Outreach Report

Leatham stated the Outreach Committee did not have their meeting for the month of September because of IRS training during the week their meeting was scheduled.

- Members were encouraged to continue to do Outreach, Outreach, Outreach with family members, social groups, and take every opportunity for Outreach to have Taxpayers voices heard
- Eugene Lillie encouraged members to reach out to their Chamber of Commerce for opportunities to do Outreach. The real estate firms may have opportunities. Members were encouraged to reach out to all organizations

Internal Communications

Leatham shared the following updates for ICC:

- David Newingham asked if there was an activity log for recording ICC activity. Lillie informed the members by logging in under their home committee hours can be recorded for ICC
- ICC had their meeting on September 19, 2023
- Discussions centered around the Facebook page, postings schedule, the number of times per week for postings
- During their follow up meeting, they decided to have regular posts go out on the Facebook page
- Issue 68481, allowing members of the public to have access to join TAP meetings was discussed. Additional research with CSO is being done. O'Sullivan will follow up to confirm if CSO will be monitoring it
- ICC discussed the issues with www.TAPSpace.org improvements. Members are to continue sending requests and updates to O'Sullivan and Richard Rodriguez. The link was updated, and ICC will continue to monitor
- Issue 69169, Allowing VITA TCE sites to order Speak Up Brochures was discussed. This issue is ready to move forward to SA and the Attorney Advisor. Conchata Holloway added the issue has not been sent to SA and the Attorney Advisor because Donna Patterson submitted recommendations and justifications for the committee to review and decide what to do. It will be forwarded at the next meeting. O'Sullivan will add the updated information is included and provided in the pre-reads for the next meeting

Action Items

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

- Post the approved September 12, 2023, minutes to www.TAPSpace.org and forward to Kevin Brown for posting www.ImproveIRS.org
- Update the information in the system from the Screening Report
- Issue 41122 and 66143 will continue to monitor for information to share with the committee
- Continue doing research on the items currently researching
- O'Sullivan is available for questions and or concerns

Roundtable

- Leatham added he will draft the notes for the Newsletter for October. The notes will be shared with Cynthia Mills for review by Thursday of this week

- Joseph Parampathu suggested Bios be provided by the third-year members for the Facebook posting. Leatham agreed and suggested to notify all TAP third-year members. This is only if they would like to have their information added

Closing

Jimerson expressed thank you to the full committee for attending and all of the work they are doing. Members were encouraged to continue posting their activity hours onto the report.

The meeting was officially closed at 2:44 PM, EST.

**Next Meeting: Tuesday, November 14, 2023
1:00 PM EDT, 12:00 PM CDT, 11:00 AM MDT, 10:00 AM PDT**

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