

**Taxpayer Assistance Center Improvements Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, April 09, 2024**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer

Attendance

- | | | |
|----------------------|-----------------|------------|
| • Jackson Bauzon | Los Angeles, CA | Member |
| • Shequeila Birdsong | Amherst, NY | Member |
| • Mary Lawler | Dearborn, MI | Member |
| • David Newingham | Henderson, NV | Member |
| • John Rodgers | Anchorage, AK | Member |
| • Richard Rodriguez | Stockton, CA | Chair |
| • Jim Simpson | Phoenix, AZ | Vice Chair |
| • Berlinda White | Cheyenne, WY | Member |

Member Absent

- | | | |
|-----------------------|-----------------|--------|
| • Paulina Fernandez | San Antonio, TX | Member |
| • Anthony Jackson Jr. | New Orleans, LA | Member |

Staff

- | | |
|-------------------------|------------------------------|
| • Shawn Collins | Acting, TAP Director |
| • Matthew O'Sullivan | TAP Program Analyst |
| • Rosalind Matherne | TAP Program Analyst |
| • Jose Cintron Santiago | TAP Program Analyst |
| • Kelvin Johnson | TAP Program Analyst |
| • Conchata Holloway | TAP Program Analyst |
| • Annie Gold | TAP Administrative Assistant |

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 provided and the following updates:

- Annie Gold has been contacting members to obtain travel information to make the travel arrangements for the FTF meetings

- Members traveling to the FTF were reminded, their presence is expected at each of the sessions including the committee meetings and the all day training session.
- April 16, 2024, the Internal Communications Committee will have their first meeting beginning at 4:00PM, EST. Representative from the TAC will represent during the meeting
- April 22, 2024, the Joint Committee will have their meeting beginning at 3:00PM, EST. The Joint Committee is the overriding governing body for TAP where all of the committee Chairs and Vice Chairs meet to review the referrals submitted for elevation to the IRS. It is an open meeting and members were encouraged to attend. Members who may be interested in attending were encouraged to contact the Analyst who will forward the invite to join the call
- The invite for the Outreach Committee's meeting on next week will be coming out. This meeting is lead by the National Vice Chair. The Vice Chairs from each project committee will be in attendance. Work is performed on ways to conduct Outreach efforts, ways to improve on that and expand the audience

National Office Update

Shawn Collins welcomed everyone to the call. Members were thanked for their participation. Collins is looking forward to working with everyone. The following National Office updates were share:

- The Fact to Face meetings have been scheduled and planned. The locations are Jacksonville, FL; Oklahoma City, OK; and San Antonio, TX
- Committee Analysts contacts have been made regarding making travel arrangements. If members have not been contacted, they will be soon
- Members were encouraged to file their 2023 Tax Returns. Currently there are five days remaining for the filing season. Members were encouraged to file timely and to keep in mind if an extension is requested it is an extension of time to file but not an extension of time to pay
- TAC offices will begin Saturday openings. Members were encouraged to check their locations for Problem Solving days by checking on the website or with the committee Analyst. The Analysts will be able to provide the information. This will be a good opportunity to conduct Outreach
- Members were encouraged to subscribe to the NTA Blog for all of the available information she has posted.
- TAP Recruitment period ended on March 29, 2024. A total of one hundred-forty-three (143) applicants were received. Information is being processed to begin the interview process.
- Members were encouraged to reach out to Collins with questions and or concerns

Chair Report

Richard Rodriguez shared the following:

- Rodriguez will be adding to his Activity Report information he witnessed from an individual having first-hand knowledge of the issue, first-hand knowledge of what was going on and when it occurred.
- Rodriguez shared an incident where a Taxpayer needed to make an appointment. A call was placed to the TAC. The Taxpayer was having a problem getting a pin. The first call, his information was taken with no help available. A second call only to be transferred. A third call was made and was informed the system was down and the Taxpayer would have to get it on his end because they would not be able to obtain it for him. Rodriguez could not get an appointment nor the employee's ID number. The fourth call was helpful in resolving a back Tax issue and getting an appointment for the original call. The employee offered a survey at the end of the call. Members were encouraged to listen to people.
- A representative from IRS will be attending TAC calls to ask questions. They will provide information on things the committee will be able to work after receiving their responses to provide recommendations. Rodriguez suggested finding out what the status of the TACs and finding out if they are operating at 100%. Find out what the level of service is and how is being provided. Ask why service is being offered at the back end and not the front end. Members encouraged to meet Taxpayers face to face
- Rodriguez is looking forward to seeing members at the FTF next week
- Information will be shared with the committee after the Joint Committee meeting
- The Screening Committee will have their meeting after the FTF. Rodriguez anticipates there will be new issues coming from their meeting

Minutes Approval

TAC March 14, 2023, Minutes were approved with correction.

Jim Simpson moved, and John Rodgers seconded.

Member of Public

N/A

Annual VITA Project Review

TAC was asked to review Project Proposal 72473, VITA/TCE Training Materials. The committee will review and make sure it is in the correct format and send it back. Matthew O'Sullivan spoke with Conchata Holloway. She has a request in to the IRS Shareholders Partnership Education Committee (SPEC) to find out when the meetings will take place and how to have members meet for meetings.

Members will be solicited to volunteer on preferred aspect of the project.

O'Sullivan added the committee will review what they want to do to the changes to the Publications and the instructions materials. Jim Simpson added it is hard to imagine how an external committee can look at the materials. It needs Subject Matter Experts (SME). Jim volunteered to be a part of the group to review the

materials. Jimerson added members with VITA Program experience can provide real Taxpayer input on the changes being made. This is an important review that has been done for a number of years. Getting the dates and times members will need to be available is in motion. Rodriguez volunteered to take the lead with Simpson assisting. He will complete the paperwork, provide, and coordinate information for the committee on what is being done. David Newingham asked is it because of experience. Jimerson confirmed they look for members with experience working within the VITA program. This helps provide a better product. Solicitation for volunteers will be done within the TAC committee and others outside of the committee with VITA experience to participate. Newingham shared his feedback on additional structure the members will be doing. Rodriguez suggested members takes notes for changes. The information will be brought back the TAC committee to make referrals for change. O'Sullivan stated he is waiting to receive information from IRS on what are the details. He will share information with members as it becomes available.

Subcommittee Report

Subcommittee 1

Berlinda White shared the following updates for Subcommittee 1:

- The subcommittee met on April 02, 2024. White was elected as the Chairperson
- Issue 66143, Taxpayer Record Keeping was reviewed. Recommendations were made and the subcommittee is waiting to hear back from the IRS. They will be reaching out to follow up on their response. O'Sullivan added he has contacted the Joint Committee for a follow up
- Issue 63738, Appointment System on How IRS Handles Rescheduling additional research is being conducted before any recommendations will be made
- Issue 61961, Taxpayers with Disabilities
- Issue 66217, VITA Accessibility for Blind and Deaf Taxpayers. This issue will be combined with Issue #61961 and conducting additional research on what accommodations are being made before submitting any recommendations
- Issue 62215, VITA Program Services for International Taxpayers. Research is being done to determine if the number of facilities accommodates the number of Taxpayers before making recommendations
- All are active Issues that Subcommittee 1 is working

Subcommittee 2

John Rodgers shared the following updates for Subcommittee 2:

- Access to the TAC for the Elderly
- Appears the Issues are relative to the TAC
- Should there be a kiosk
- Issue 55988, Allowing the Elderly to be able to go online to complete forms to describe their problems. This issue was brought to TAC during

last year. Suggestions were made to allow the Taxpayer to be able to go online and state their problems and set up a TAC appointment. Allow them to access the self-help method by using kiosk. IRS stated the issue was resolved prior to elevation. They referred to Publication 3744, enable Taxpayers to do this, and schedule appointments online. Subcommittee 2 is requesting the specific information from IRS on what they have done prior to accepting or not the IRS response. Additional data is needed to move forward

- O’Sullivan added the committee can accept the IRS response, or partially accept it. They could agree with one thing being done and not agree with another. They can push back if additional information is in hand. Jimerson added before a rebuttal is done, find out the specifics the IRS is saying before deciding whether to accept the IRS response or not
- Rodriguez shared encouragement to the committee how Mejbeen to continue asking questions, going out and digging to keep these things going.

Screening Committee

O’Sullivan shared the following:

- The Screening Committee has not had a meeting yet
- Their first meeting is scheduled two weeks from now
- O’Sullivan is working on the Screening Report to discuss all new incoming issues to review and discuss during the next full committee meeting
- The discussing will be a lot to deal with
- Members on the Screening Committee confirmed they received the invite to the meeting

Outreach

Simpson stated the notice for the first Outreach meeting was received moments ago. It will be held on April 18, 2024. He will have more to report during next month’s meeting.

Internal Communications Committee

Simpson shared the following:

- Each subcommittee will have to submit a report
- The reports are due by the 25th of each month
- O’Sullivan reminded members a guide was share on last month to assist in their submission. ICC completes the Newsletter. O’Sullivan is the Analyst overseeing the ICC. Members send drafts to O’Sullivan by the 25th of the month. It goes to Jimerson who is the editor and publisher
- Members encouraged to reach out to O’Sullivan with questions

Rodriguez encouraged members to log all activities in the Activity Reports. Members reminded when leaving home for the FTF travel, log time the moment you leave your residence.

Rodriguez volunteer to submit the Newsletter article for May.

Action Items

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

- Post the approved April 09, 2024, minutes to www.TAPSpace.org and forward to Kevin Brown for posting www.ImproveIRS.org
- Conduct the Screening Report meeting in two weeks and work on the report to be discussed. Send out to the committee
- The Activity reports will be sent to members
- Monitor information from IRS on responses and share with members as they are received
- Encourage members to reach out to O'Sullivan with questions and he will get back with each member

Roundtable

Rodriguez asked for comments for the Roundtable:

- Newingham stated he will be sharing information with Rodriguez on stats for the TACs increase and virtual counts as well as information on the importance of using the assistance from the LTAs. It is important to know what is going on at the TACs
- Rodriguez encouraged members to reach out to each other and talk things out, write down ideas and suggestions

Closing

Jimerson expressed thank you to the full committee for attending, participating, and stepping up to the plate. Congratulations Rodriguez and Simpson.

The meeting was officially closed at 3:56PM, EST.

Next Meeting: FTF May 9, 2024, Meeting in Oklahoma City, Ok

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