

**Taxpayer Assistance Center Improvements Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Thursday, May 9, 2024**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer

Attendance

- | | | |
|----------------------|-----------------|------------|
| • Richard Rodriguez | Stockton, CA | Chair |
| • Jim Simpson | Phoenix, AZ | Vice Chair |
| • 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 |
| • Berlinda White | Cheyenne, WY | Member |

Member Absent

- | | | |
|-----------------------|-----------------|--------|
| • Elizabeth Colvin | Austin, TX | Member |
| • Anthony Jackson Jr. | New Orleans, LA | Member |

Staff

- | | |
|----------------------|------------------------------|
| • Matthew O’Sullivan | TAP Program Analyst |
| • Kelvin Johnson | 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. The agenda was reviewed and Jimerson provided the dates and times of the upcoming Internal Communications, Outreach and Joint Committee meetings for May 2024.

Chair Report

Rick Rodriguez gave the Chair Report and thanked the members for volunteering to serve the country and emphasized the importance of the work we do in the TAP.

Vice Chair Report

Jim Simpson gave the Vice Chair Report, he provided the members with an update concerning Outreach activities and reminded the members to document their activities on their Activity Reports. He reminded the members that this should include all of the time taken travelling to and from the meeting this week.

Minutes Approval

Berlinda White motioned that the April 9, 2024, meeting minutes be accepted, Jim Simpson seconded. The minutes were accepted.

Member of Public

No comments.

Project Proposal 72473 VITA/TCE Training Materials

The IRS sent the list of the dates and times of the meetings for the VITA Product Review. The members provided the items they volunteered to participate in. O'Sullivan forwarded the information to the Joint Committee Analyst.

Sub-Committee 1 Report

Berlinda White reported. We are still waiting for information from IRS in response to our request on Issue 66143 Taxpayer Communication – Recordkeeping. O'Sullivan will provide updated information upon receipt from IRS. Issue 67378 concerns difficulties in rescheduling appointments at TAC offices. We are going to work this issue in combination with other issues received concerning appointment problems. Issue 61961 This Whole System Really Does Not Want to Hear is going to be closed as associated with Issue 66217 TBOR Support the IRS To Enable Taxpayers. Issue 66215 There Are Limited Locations That Are Certified to be dropped by the committee.

Sub-Committee 2 Report

John Rodgers reported. Issue 55988, Allow Taxpayers to Fill Out a Form Stating Their Issue. We are still waiting for information from IRS in response to our request for additional information. O'Sullivan will continue to monitor this for a response and provide information to the committee upon receipt. Issue 68953 Increase the Number of LITC's, Issue 68954 Senior Hours at TACs and Issue 62231 Longer TAC Hours are to be dropped. Issue 66145 VITA Income Limitations is to be worked by the committee. There was a scheduling conflict on the July Sub-Committee 2 meeting, it was originally scheduled for July 4, which is a holiday. This meeting has been re-scheduled for July 2, 2024, at 5:00 PM Eastern time.

Screening Committee

Rick Rodriguez and Jackson Bauzon led the review of the Screening Report for the entire committee. The committee determined to drop the following issues: 69550, 69580, 69586,

69848,69640, 66215,68953,68954. Issue 69562 was closed as associated with 69548. Issue 69161 was closed as associated with 66217. Issue 62231 was closed associated with 66145. Issues 67853 and 67854 were closed associated with 67378. The next Screening Meeting will be held on June 2, 2024, at 5:00 PM Eastern time. All committee members will be invited to attend this meeting.

Outreach Report

Jim Simpson reported. He provided an update on the recent activities of the Outreach committee and reminded everyone to be on the lookout for outreach opportunities. Outreach can happen anywhere and to be sure to record any time spent on outreach activity.

Internal Communications

Jim Simpson reported. He reminded everyone that our next TAP Newsletter article is due to O'Sullivan by the 25th of the month. Jimerson reminded everyone that the ICC has developed a template to use. We scheduled the Newsletter articles to be written as follows: June Jim Simpson, July John Rodgers, August Berlinda White and David Newingham, September Shequeila Birdsong, October Maryann Lawler, November Rick Rodriguez.

Meeting Action Items

Matt O'Sullivan reported. He will post the approved April 2024 meeting minutes to TAPSpace and send them to Kevin Brown for posting to Improve. He will update the TAC inventory to close the items we agreed to close and associate with other items. He will run a new inventory report to the next screening meeting, request information from IRS for the questions that still outstanding and forward any new information received from IRS to the members. Monitor information from IRS on responses and share with members as they are received.

Roundtable

Rodriguez asked for comments for the Roundtable:
Members provided feedback and comments on the accomplishments completed at the meeting.

Closing

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

The meeting was officially closed at 2:45PM, CST.

Next Meeting: June 11, 2024.

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