

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

**Designated Federal Officer**

- Susan Jimerson Designated Federal Officer

**Attendance**

- |                      |               |            |
|----------------------|---------------|------------|
| • Richard Rodriguez  | Stockton, CA  | Chair      |
| • Jim Simpson        | Phoenix, AZ   | Vice Chair |
| • Shequeila Birdsong | Amherst, NY   | Member     |
| • Mary Lawler        | Dearborn, MI  | Member     |
| • David Newingham    | Henderson, NV | Member     |
| • Berlinda White     | Cheyenne, WY  | Member     |

**Member Absent**

- |                    |                 |        |
|--------------------|-----------------|--------|
| • Jackson Bauzon   | Los Angeles, CA | Member |
| • Elizabeth Colvin | Austin, TX      | Member |
| • John Rodgers     | Anchorage, AK   | Member |

**Staff**

- |                         |                                     |
|-------------------------|-------------------------------------|
| • Shawn Collins         | Acting, TAP Director                |
| • Matthew O'Sullivan    | TAP Program Analyst                 |
| • Jose Cintron Santiago | TAP Program Analyst                 |
| • Kelvin Johnson        | TAP Program Analyst                 |
| • Conchata Holloway     | TAP Program Analyst                 |
| • Annie Gold            | TAP Administrative Assistant        |
| • John Manhire          | TAS Legal Administrative Specialist |

**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:

- Members were encouraged to reach out to Jimerson with concerns and or questions. Matthew O'Sullivan will share Jimerson contact information with each member
- The National Taxpayer Advocate, Erin Collins released the June Objective Reports

- The first June Objective Report outlines the objectives for the year. It was delivered on June 26, 2024, Members were encouraged to look over the report
- The second was the Annual Report which outlined the ten most serious problems
- The National Tax Forums have begun. Currently being held in Chicago and is scheduled for July 09, 2024, through July 11, 2024. The Orlando Tax Forums begins at the end of July. There will be TAP Staff and members attending the forums
- There are four full Committee meetings remaining for this year. Appreciation was express to members for the work being done
- On July 10, 2024, TAP's Annual Quarterly Meeting will be held beginning at 1:00PM, EST. There will be speakers from Direct File available to speak with members. Members were encouraged to be available for the call
- The Outreach Committee will have their meeting on July 18, 2024, beginning at 2:00PM, EST and is led by TAP National Vice Chair, Michelle Brookens
- On July 18, 2024, ICC will have their monthly meeting beginning at 3:00PM, EST. Discussion on the internal and external communications and messaging
- The Joint Committee will have their monthly meeting on July 25, 2024, beginning at 3:00PM, EST. This is a meeting with the TAP Chairs to review the referrals that have been submitted for approval and forward to the IRS

### **Chair Report**

Richard Rodriguez shared the following:

- There are four remaining meetings for this TAP year
- Members were encouraged to continue to work as a team and help each other. When determining a recommendation, members were encouraged to define the problem. Members were encouraged to stick with their passion, ask questions and find answers to see if it has already been done
- The Activity Reports are very important, members were encouraged to complete their reports, and understand what they are being recognized for
- Members attending the forums and speaking about TAP are conducting Outreach. Members were encouraged to document their time appropriately with the emails being read, accounting for the research done, and the time it takes to document it on paper

### **Minutes Approval**

TAC June 11, 2024, Minutes were approved with corrections.  
Jim Simpson moved, and Shequeila Birdsong seconded.

### **Member of Public**

N/A

Rodriguez shared the following along with Matthew O'Sullivan:

- Issue 72473, VITA Project Review Training Material members have attended the meeting and provided their feedback. The meetings continue. Rodriguez will be attending one today, tomorrow, and on Thursday
- Jim stated he worked on the VITA Review project on Publication 4391. He will be doing a write up for the report
- Rodriguez added to keep an ear out and make changes if needed then move to the next. O'Sullivan added he is looking for everyone to contribute. The information could be useful and added to the Annual Report

### **Subcommittee Report**

#### Subcommittee 1

Berlinda White shared the following updates for Subcommittee 1:

- Issue 66143, IRS Project Referral they are waiting for additional information from IRS. Conchata Holloway sent a follow up email
- Issue 67378, The Appointment System Issue a project referral form is being worked. More to come from Subcommittee 1
- Issue 68217, Access for Disabled Taxpayers has a proposal formed being worked. A complete referral is being worked along with the members of the committee
- Issue 69548, Customer Feedback was submitted to O'Sullivan for information to make sure it is not being worked by another committee. O'Sullivan stated he sent to all the member for any information wanting to change. His next step to forward to SA and the Attorney Advisor

#### Subcommittee 2

O'Sullivan shared the following:

- Issue 55988, Allowing Taxpayers to fill out a form. Subcommittee 2 is waiting for additional information from IRS
- Issue 66145, The VITA income limit. Subcommittee 2 did receive some information from IRS stating the income limit is a guideline. Simpson presented a question regarding the percentage who receive the grants from IRS. Simpson added he is narrowing it down into two sentences requesting consistency

### **Screening Committee**

Rodriguez stated the Screening Committee did not have their June meeting. He will be reaching out to members for the date. O'Sullivan added the holiday prevented scheduling the meeting. He will get with the members and have a date prior to the August meeting

### **Outreach**

Simpson stated the following:

- IRS conferences are in process. Members are traveling to stock tables during the meetings. Kevin Brown is making the travel arrangements

- Simpson will be in Dallas meeting in August and the San Diego meeting
- Members were encouraged to open their minds to what is being done as Outreach for more opportunities to do more. Simpson will be doing a presentation at a conference in Tucson, AZ at the Arizona Department of Education for their high school kids on what to do with Taxes. He will add information on TAP
- Members were encouraged to think where they are speaking about TAP and put that time on their Activity Reports

### **Internal Communications Committee**

Simpson shared the following:

- A motion was made to close the SpeakUp Brochure project due to IRS response. There will be some edits to the brochures that will be in the control of TAP
- The other project allowing members of the public to join the email list to join TAP meetings is still being worked trying to tie in other IRS tools rather than recreate from scratch
- Discussions on the TAP Newsletter to set a schedule for members submissions. Members were encouraged to look at the Facebook page and make post to the page

### **Action Items**

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

- Forward June 11, 2024, Minutes to Kevin Brown for posting onto [www.TAPSpace.org](http://www.TAPSpace.org) and to [www.ImproveIRS.org](http://www.ImproveIRS.org)
- Subcommittee issue will be sent to SA and to the Attorney Advisor for feedback
- Run members Activity Report and share with each member with a copy of the overall report to the Chair and Vice Chair
- Update the Screening Report and work with the leaders to schedule a new Screening meeting
- ICC issue on the SpeakUp Brochure was edited and they will be available at the VITA sites next season

### **Roundtable**

Rodriguez asked for comments for the Roundtable:

- Members were encouraged to write any ideas during the month to their subcommittee partners
- When sending official emails with new information or working issues make sure a courtesy copy to [TaxpayerAdvocacyPanel@irs.gov](mailto:TaxpayerAdvocacyPanel@irs.gov) email address
- Members were encouraged when seeing ways of doing it well, things that work, this could be something to improve with IRS
- Currently there are referrals concerning customer service, disability, how buildings are being looked at, how they are accommodating different issues, whose being served, how they are being serve and the appointment system. Members were encouraged if they see things that

really work well, document and share those question for possible recommendations

- Members who may need anything were encouraged to let Rodriguez and O'Sullivan know

Shawn Collins expressed thank you to members for doing good work. The Activity Reports are doing great, continue the good work. She is looking forward to seeing the Chairs in August.

Rodriguez encouraged members to share with him any thing that would make better let him know and he will share with the Joint Committee

### **Closing**

Jimerson thank everyone for joining the call. Members were encouraged to attend the meeting scheduled for tomorrow July 10, 2024, the TAP Annual Quarterly Meeting.

The meeting was officially closed at 3:45PM, EST.

**Next Meeting: Tuesday, August 13, 2024  
1:00PM EDT, 2:00PM CDT, 10:00AM MDT, 09:00AM PDT**

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