

**Taxpayer Assistance Center Improvements Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, August 13, 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 |
| • Elizabeth Colvin | Austin, TX | Member |
| • Mary Lawler | Dearborn, MI | Member |
| • David Newingham | Henderson, NV | Member |
| • John Rodgers | Anchorage, AK | Member |

Member Absent

- | | | |
|----------------------|--------------|--------|
| • Shequeila Birdsong | Amherst, NY | Member |
| • Berlinda White | Cheyenne, WY | Member |

Staff

- Matthew O’Sullivan 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:

- The Recruitment interviews have been completed and now the background process is underway. Recommendations will be completed and forwarded on for consideration for TAP year 2025
- The Tax Forums are in process. Currently in Baltimore, MD the forum runs August 13-15, 2024. The Tax Forum will be held in Dallas on August 20-22, 2024. The last forum will be held in San Diego, CA on September 10-12, 2024
- The Outreach Committee will have their meeting on August 15, 2024, beginning at 2:00PM, EST and is led by TAP National Vice Chair, Michelle Brookens

- The Internal Communications Committee will have their meeting on August 16, 2024, beginning at 3:00PM, EST. The date had to be changed due to the TAP Staff conflict
- The Joint Committee will have their monthly meeting on August 22, 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 for consideration
- August 27-28, 2024, the Joint Committee Planning meeting will be held. The meeting consists of the Chairs and the members of the Joint Committee

Chair Report

Richard Rodriguez welcomed everyone to the call and expressed appreciation for members' time. The following updates were shared:

- The final meetings are approaching, September, October, and November
- Members were encouraged to think of something that is passionate to them. Things to get done or help others to get things done
- Members urged to pay attention to their emails. Include in the messages how things should be worked
- A lot of good can be done as a group to make an impact
- Members were thanked for their support
- During the next couple of months, members may see a lot of things coming their way offline. Give what you believe, do a little research on it if you don't know and A and I is an awesome tool for writing
- The Joint Committee Planning meeting is coming at the end of the month. Members were asked how to make it better with recommendations or things they may see, send Rodriguez an email to get across. The meetings are open meetings for members who would like to attend and hear what goes on and be a part of
- Appreciation was expressed to Matthew O'Sullivan for all he do to assist the TAC Committee

Minutes Approval

TAC July 09, 2024, Minutes were approved as submitted.
Jim Simpson moved, and Elizabeth Colvin seconded.

Member of Public

N/A

Issues Responses

Rodriguez shared the following updates:

- Issue 69548, this referral is the on the feedback issue. A feedback method will be created on the main IRS webpage. The Taxpayer Bill of Rights states a right to quality service and the right to speak to a supervisor. The referral was presented to the committee for review. The issue came from grassroots. It was sent to Systemic Advocacy (SA) and the Attorney

Advisor (AA). Their recommendation was to be cautious of any PII information. Once TAC receives their feedback, it can be forwarded to the Joint Committee for their review and possibly on to the IRS.

Colvin motion to forward to the Joint Committee and Simpson seconded.

Decision: Full Committee Consensus to forward Issue 69548 to the Joint Committee for review

- Issue 72473, By Laws TCE Training Materials. Members participated and provided their update. Rodriguez, Jackson Bauzon, Jim Simpson, and Berlinda White participated. Rodriguez shared information with the Joint Committee and will inquire if it is something the TAC will submit a recommendation on.

Subcommittee Report

Subcommittee 1

O'Sullivan shared the following updates for Subcommittee 1:

- Issue 66143, IRS Project Referral they are waiting for additional information from IRS. Working with Conchata Holloway to get update on where they are
- Issue 68217, Access for Disabled Taxpayers, O'Sullivan received a response from IRS. Subcommittee 1 will work to update a draft referral based on the information received from IRS. Subcommittee 1 will revisit and have additional information for the full committee at the next meeting
- Issue 67378, The Appointment System Issue a project referral form is being worked. O'Sullivan researched the IRM on the rescheduling policy. Subcommittee 1 suggested request from the Joint Committee to have a SME come and discuss with the committee. Subcommittee 1 will revisit

Subcommittee 2

O'Sullivan shared the following:

- Issue 55988, Allowing Taxpayers to fill out a form. IRS responded the issue was resolved prior to elevation. There was an issue with the response. The issue is being look at. Jimerson added the issue is under consideration and is a part of the Strategic Operating Plan. This changes it to under consideration. This issue will be monitored and able to be discussed further
- Issue 66145, The VITA income limit. John Bauzon stated Subcommittee 2 did receive some information from IRS stating the income limit is a guideline. They had a good discussion on the issue. Subcommittee 2 is waiting for additional information for revision

Screening Committee

Rodriguez stated the Screening Committee did not have their July meeting. He will be reaching out to members for the date. O'Sullivan he will reach out to the Screening Committee and his calendar to schedule the next meeting and update with new information. The new Screening Report was shared with the committee.

Members were asked to review the report to be ready for discussions during the next scheduled meeting.

Outreach

Simpson stated the following:

- He will be attending the Tax Forum in Dallas, TX and he will be going to the San Diego, CA forum.
- The Activity Reports should have a total of eighteen hundred to twenty-seven hours by the end of the year. The bad news is there is eight hundred hours. Members were unaware they needed to track hours.
- Members were encouraged to record their hours
- Jimerson stated TAP year ends November 30, 2024. Members were advised to consider the time you leave home until the time returned. That is 24 hours per day if attended the Face-to-Face meeting. Attending Outreach events, includes the time left and the time returned home, the research and reading time, travel time, proofreading the referrals. All the time counts including preparation time. Rodriguez stressed justifying the time is very important

Internal Communications Committee

Simpson shared the following:

- ICC is anticipating getting champions on the social media outlets, Facebook, Instagram, etc. They are looking for content providers and administrator people. Members who may be interested were encouraged to let Simpson know to pass the information on the committee
- O'Sullivan added the Newsletter Shequeila Birdsong is scheduled to do the article for September and have the information by August 25, 2024

Action Items

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

- Forward July 09, 2024, Minutes to Kevin Brown for posting onto www.TAPSpace.org and to www.ImproveIRS.org
- Update Issue 69548 and forward to the Joint Committee
- Work on the Screening Report and schedule meeting date for their next meeting
- O'Sullivan is available to assist with completing Activity Reports to ensure credits are obtain for the work being done
- Request SME for Committee questions

Roundtable

Rodriguez asked for comments for the Roundtable:

- Members to share with him any thing that would make better let him know and he will share with the Joint Committee
- Bauzon asked for ideas on doing Outreach in small areas. Suggestions were shared to go onto Facebook page, social media, reach out to Angela Madison.

- Rodriguez added all is a part of doing Outreach. He will reach out to Bauzon to offer suggestions on doing Outreach

Closing

Jimerson expressed appreciation for everyone being on the call and thanked members for their service.

The meeting was officially closed at 3:58PM, EST.

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

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