

**Taxpayer Assistance Center Improvements Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, June 11, 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 |

Member of Public

- Nicole Folley

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 |
| • Christopher Duling | Systemic Advocacy Attorney Advisor |

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:

- It was a great opportunity to interact with members during the FTF meetings. There were a lot of great discussions on the issues being worked. It was a great format for the discussions
- ICC will have their monthly meeting on June 20, 2024, beginning at 3:00PM, EST

- Outreach will have their monthly meeting on June 20, 2024, beginning at 2:00PM, EST and is led by Michelle Brookens
- Members were encouraged to enter all time spent on TAP including the time departing residence to the time returned is considered TAP time
- June 27, 2024, the Joint Committee will have their monthly meeting. The National TAP Chair and Vice Chair along with the Chairs and Vice Chairs from the project committees will be in attendance. Member were encouraged to attend for a learning experience to see what occurs in the Joint Committee level

National Office Update

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

- TAP Member Quarterly Meeting will be held on July 10, 2024, beginning at 1:00PM, EST. There will be a calendar invite sent out to members
- The Joint Committee's planning stage meeting is in the process of being finalized for August 26, 2024, through August 29, 2024. Additional information will be shared
- There were lots of great feedback received from the FTF meetings. The Staff is in the process of dissecting through the things that may have been not so good to improve on and the things that were good to make better
- Members were encouraged to enter all hours onto their activity reports. The hours are very important. Kelvin Johnson, the reports staff member built an outstanding robust database that will keep track of all the information for viewing from each member. Members were reminded to add all time spent including time spent in meetings onto their reports. Talking to anyone about TAP is to be added. This helps in keeping track of all the activities
- Collins is always available for questions and or concerns

Chair Report

Richard Rodriguez shared the following:

- Thank you expressed to members for their attendance
- During the first phase in March, April, and May the committee get together and figure out what is going on, develop ideas on what they want to do and understand the process. This has been done. Over the next three months of July, August, and September the committee will narrow it down and produce work for the people by doing what we can in moving the efforts forward. All of the committee's efforts null if nothing is presented to the Joint Committee and they approve it.
- Members support and efforts are anticipated
- Members encouraged to attend the meetings
- Members working on projects were encouraged to reach out and email each other. Remember to send a copy to the TaxpayerAdvocacyPanel@irs.gov mailbox

- Subcommittee leads will be reaching out to members and pushing ideas forward
- Thank you and appreciation was expressed to members who volunteered for the reviewing of the products and publications
- The Screening Committee did awesome work in getting referrals out and making decisions on them. The committee will move forward on the issues that they decided to accept and work on
- Members encouraged to document activities and log the hours onto their Activity Report. This is a great opportunity to acknowledge the efforts put forth

Minutes Approval

TAC May 09, 2024, Minutes were approved with corrections.
Jim Simpson moved, and Jackson Bauzon seconded.

Member of Public

N/A

Screening Committee Report

Rodriguez shared the following along with Matthew O'Sullivan:

- Issue 72473, VITA Project Review members have attended the meeting and provided their feedback. Members will write up what was done to share with Rodriguez, O'Sullivan, Jimerson, with a copy to the TaxpayerAdvocacyPanel@irs.gov to prepare the referral. Jimerson added a part of the write up will be added to the TAP Annual Report

Subcommittee Report

Subcommittee 1

O'Sullivan shared the following updates for Subcommittee 1:

- Issue 66143, IRS Project Referral was sent up to the Joint Committee to IRS during last year. Waiting for additional information from IRS. Conchata Holloway sent an inquiry on yesterday and will share with the committee once the response has been received
- Issue 63738, The Appointment System Issue a project referral form is being worked on. O'Sullivan will begin putting the referral form together and share with the committee
- Issue 66217, Access for Disabled Taxpayers has a proposal formed being worked. A complete referral will be worked along with the members of the committee
- Rodriguez shared information he pushed out during the FTF on the FTF office hours at the TACs. Attending a TACs in California with hours 9:00 to 4:00. He was able to share information about TAP, what TAP can do and how TAP can help, passed out flyers, and gave out cards. Close to ninety percent of Taxpayers did not have all the required information need to complete the transaction needed. The takeaway for the committee is to

look into how Taxpayers are told what specific items or information is needed for specific services to bring with them or get things done.

Subcommittee 2

Rodgers provided updates on the following issues for Subcommittee 2:

- Issue 55918, Allowing Taxpayers to fill out a form. The question to IRS was what has IRS done. Holloway is waiting for a response and keep the committee updated
- Issue 66145, The VITA Issue some preliminary writeups have been done on the recommendation form with a couple of recommendations. David Newingham added TAS has been dealing with this and started a recommendation back in 2006. This issue has been ongoing with TAS since 2017 on the income limit for Taxpayers to use the VITA system. Information will be shared with O'Sullivan who will get information out to members. Jim Simpson added, Scheduled C Taxpayers small businesses had inconsistencies on how they were being treated in the VITA program. VITA can not help small businesses. This is the main issue Simpson brought up to and tried to address in the email. O'Sullivan will share with the committee any information he receives.
- Rodriguez encouraged members not to get discouraged but continue to put it together and get out there and have them resolve it and get responses from SA, the Attorney Advisors to move forward

Screening Committee

O'Sullivan shared the following:

- Thank you to all members who participated in the Screening Committee's meeting
- A copy of the Screening Report was shared with the committee prior to the meeting for their review. O'Sullivan asked if how he outlined the issues in his summary was acceptable

Rodgers motioned and Simpson seconded to approve Screening Report as submitted

Decision: Full Committee Consensus accept the Screening Report as submitted

Outreach

Simpson stated the following:

- Members have been assigned to all four of the conferences
- Simpson will be in Dallas
- Simpson will be going to San Diego as an individual
- The next Outreach meeting is scheduled for June 20, 2024

Internal Communications Committee

Simpson shared the following:

- A copy of the Newsletter was shared for members to view for the June Newsletter. It had a lot to do with the FTF meeting and a lot of pictures

- Members were encouraged to keep their submission down to one page, follow the template, and utilize the notes provided by O'Sullivan
- The Activity Reports had a couple submitted eight hours which was from the time the meeting started to the end of the meeting. Members are able to go back and add from the time they left to the time they returned home.
- Time spend on the VITA committee is time to be added onto the reports
- Attending Outreach programs, add it to the Activity Report
- O'Sullivan ran the report and shared with each person. Members having problems completing the Activity Reports should contact O'Sullivan for assistance

Action Items

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

- Forward May 09, 2024, Minutes to Kevin Brown for posting onto www.TAPSpace.org and to www.ImproveIRS.org
- Information that is being waited for will be shared with members
- Begin preliminary steps in doing the referral forms and proposal forms for items being looked into. Get the information out to each member
- Updated the database with the Screening Report and run the new report for next month's meeting

Roundtable

Rodriguez asked for comments for the Roundtable:

- Bauzon thanked O'Sullivan for all the work he does
- Rodgers thanked everyone
- Simpson asked the Staff what the relationship between TAP and SAMs was. Jimerson added the fastest way is to address this issue to the TAP program. The Staff works directly with SAMs. All the issues are reported there and tracked from the opening to the end when it is closed. Going out onto www.ImproveIRS.org is the easiest way
- Thank you expressed the Nicole Folley for attending as a member of the public.

Closing

Jimerson thanked Folley for being TAP guest and the full committee for attending, and participation. Any suggestions should be entered on the website www.ImproveIRS.org and are routed directly to the TAP program for consideration.

The meeting was officially closed at 3:55PM, EST.

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

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