

**Taxpayer Assistance Center Improvements Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, September 10, 2024**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer

Attendance

- | | | |
|----------------------|-----------------|--------|
| • Richard Rodriguez | Stockton, CA | Chair |
| • Jackson Bauzon | Los Angeles, CA | Member |
| • Shequeila Birdsong | Amherst, NY | Member |
| • Elizabeth Colvin | Austin, TX | Member |
| • Mary Lawler | Dearborn, MI | Member |
| • David Newingham | Henderson, NV | Member |

Member Absent

- | | | |
|------------------|---------------|------------|
| • John Rodgers | Anchorage, AK | Member |
| • Jim Simpson | Phoenix, AZ | Vice Chair |
| • Berlinda White | Cheyenne, WY | Member |

Staff

- | | |
|-------------------------|------------------------------|
| • Shawn Collins | TAP Director |
| • Matthew O'Sullivan | TAP Program Analyst |
| • Jose Santiago Cintron | TAP Program Analyst |
| • Kelvin Johnson | TAP Program Analyst |
| • Conchata Holloway | TAP Program Analyst |
| • John Manhire | Attorney Advisor |
| • 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:

- Solicitations for volunteers to participate working on the 2027 Annual Report was sent out to the first- and second-year members. Responses are due September 20, 2024
- A solicitation for volunteers was sent to members concerning SPEC Outreach event coming up on September 26, 2024, beginning at 2:00PM,

- EST. The event will focus on preventing scams and sharing the information with the elderly, individuals with language barriers
- The Tax Forum being held in San Diego on September 10, 2024, and ending on September 12, 2024. TAC has a couple members attending the forum
 - September 19, 2024, Outreach will have their meeting beginning at 2:00PM, EST
 - September 19, 2024, ICC will have their meeting beginning at 3:00PM, EST
 - September 26, 2024, the Joint committee will have their monthly meeting beginning at 3:00PM, EST

Chair Report

Richard Rodriguez welcomed everyone to the call. Acknowledgement given to Shawn Collins and John Manhire. The following updates were shared:

- The Annual Report Team is looking for volunteers. First and second year members were encouraged to participate. Members would have an opportunity to see what other committees are doing, how their year progressed, and to have input in the actual documentation in establishing the legacy of this organization. This Ad Hoc committee usually runs October through to middle of December. This will be a good opportunity
- Members have opportunities to work with Shareholders Partnership Education and Communication (SPEC). They set up programs and meet with people. Members were encouraged to reach out to their LTA. If they are holding special events near members areas, it would be a great opportunity to participate
- The JC Planning session discussed things for the upcoming year for members to be able to hit the ground running with their program in TAC
- The virtual service centers were discussed during the JC Planning Session. The virtual centers have ten locations around the country. Some offer the web service delivery. Two locations around Tampa. This may be something TAP want look at to approve and make recommendations
- Members were encouraged to keep in mind if there were something they would like to work on at the beginning of the year.
- Work is being done on the Online Services. Special Projects Committee has been assigned the bulk of this. Members were informed to look for Online Services work for TAC and watch for focus groups
- Sub committee will meet next month. If there are questions members were encouraged to reach out to Rodriguez and TAC

Minutes Approval

TAC August 13, 2024, Minutes were approved as submitted.
David Newingham moved, and Elizabeth Colvin seconded.

Member of Public

N/A

Issues Responses

Rodriguez shared the following updates:

- Updated material will be shared with Matthew O'Sullivan directly after this call for project 72473
- Issue 72473, By Laws TCE Training Materials was a volunteer focus group to update those products. O'Sullivan added the information will be use as a part of the Annual Report

Subcommittee Report

Subcommittee 1

O'Sullivan shared the following updates for Subcommittee 1:

- Issue 66143, IRS Project Referral information was received and shared with members on the update Conchata Holloway had a follow up question on the tip sheet. Members need to respond to Holloway with their decision if it is what was needed. Subcommittee 1 will response during their next meeting
- Issue 67378, The Appointment System Issue a project referral form is being worked. O'Sullivan researched the IRM and provided information he discovered. Taxpayers need to reschedule an appointment, the IRM had a lot of information on what the Taxpayers needed to do. There was not a lot of information on rescheduling prior to missing the appointment. Subcommittee 1 will discuss how to make this process more user friendly for the Taxpayers. Additional work will be done during the next couple of months to have a draft by the end of the year
- Issue 68217, Access for Disabled Taxpayers, O'Sullivan stated the Subcommittee has the referral. Rodriguez reminded the committee the issue needs a vote to close.
Mary Lawler moved to close, and Jackson Bauzon seconded.
Decision: Full Committee Consensus close Issue 68217

Subcommittee 2

O'Sullivan shared the following:

- Issue 66145, The VITA income limit. Subcommittee 2 had a good discussion during their last week's meeting. They have almost completed the referral for this issue. An updated version of the referral form was done by O'Sullivan and sent to members for their final suggestions. The referral will be forwarded to SA and the Attorney Advisor for their review. Subcommittee 2 will finalize the referral during their meeting on next week. Members with suggestions to be included were told to forward to O'Sullivan and he will forward to everyone
- John Manhire, Attorney Advisor was asked if he had comments. He responded there were not comments but expressed his appreciation for being able to attend the meeting

Screening Committee

Jackson Bauzon shared the following updates:

- The Screening Committee had their meeting on September 06, 2024
- They reviewed seventy issues. Fifty-four were outside of the scope for TAP and recommended they be dropped.
- The Screening Meeting was held on 9-6-24. The Screening Committee recommends dropping the following issues as being outside the scope of the TAP: 70187, 70188, 70193, 70198, 70227, 70282, 70326, 70333, 70362, 70437, 70455, 70456, 70554, 70563, 70571, 70573, 70574, 71013, 70986, 70994, 71008, 71018, 71093, 71120, 71129, 71120, 71155, 71164, 70272, 70712, 70718, 70975, 70298, 70458, 70984, 70188, 70237, 70355, 70460, 70555, 70557, 70566, 70998, 71151, 71158, 70201, 70279, 70567, 70692, 70970, 70997, 71121, 71145, 71150.
- The Screening Committee recommends closing the following issues as Associated with Issue 69548: 67481, 69589, 70224, 70570, 71012.
- Close Issue 70282 Associated with 66217
- Close 71019 Associated with 67378
- Referred Issue 70965 to Special Projects
- Referred Issues 70716 and 71006 to Toll Free Phone Lines
- Referred Issues 71092 and 71107 to Taxpayer Communications
- Referred Issue 67035 to Internal Communications. 67035. This was transferred from another committee; they originally intended it for Internal Communications not TAC.
- Recommended that the TAC accept the following issues: 76256, 70556
Lawler motioned to accept the Screening Committee's Report and Colvin seconded.

Decision: Full Committee Consensus accept the Screening Committee's Report as submitted

Outreach

O'Sullivan stated the following:

- The Outreach Committee will have their meeting on next week during the same time as ICC scheduled meeting. Members were encouraged to try and attend if time permits
- Each member's Activity Report was pulled and forwarded to each member. Members were asked checked for accuracy. If any corrections are needed send O'Sullivan a message to correct
- Rodriguez encouraged members to pull up the calendar in Google or doing an email, prereads or research should be documented on the Activity Reports

Internal Communications Committee

O'Sullivan shared the following:

- ICC has backed away from doing an email list. They are focused on taking information from what they currently have available from

- www.ImproveIRS.org and the Federal Register information. Making the information more accessible. Information will be shared with members
- ICC is doing the Newsletter and discussion were held on who will be doing the articles for the Newsletter
 - ICC is working on a continue concession plan to continue with Facebook page administrators from TAP
 - O'Sullivan is working with Outreach and the ICC Chairs to get a meeting set up with Staff and members who wants to be involved. Members were encouraged to participate if they have interest in being a part. Rodriguez encouraged members to consider volunteering in what ever area they would like to be a part of
 - The By Laws recommendations have been push out by the By Laws Committee to the Director. The Director made recommendations to the Joint Committee. The final corrections must be completed and back to the Chair and the Director by September 17, 2024
 - When the surveys come out, members were encouraged to participate
 - Newingham was asked if he had ideas on how to push things through or have any recommendation to let Rodriguez and O'Sullivan know
 - If things are out there TAP can improve, TAP can do it.

Action Items

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

- Forward August 13, 2024, Minutes to Kevin Brown for posting onto www.TAPSpace.org and to www.ImproveIRS.org
- Update the system with the closing of Issue 66217
- Input and update the actions from Screening Report
- Continue to look for additional research on the appointment process. Information will be shared with members
- Follow up on receiving feedback information from members on Issue 66143 and share with IRS
- Continue to monitor and prep information for upcoming future meetings
- O'Sullivan is available for members if things come up and they need assistance
- Remind member Subcommittee 1 and Subcommittee 2 will no longer be individual but members will meet per the Subcommittee 2 schedule. Subcommittee 1 members have already been notified. All Subcommittee 1 meetings will be cancelled

Roundtable

Rodriguez asked for comments for the Roundtable:

- Members were thanked for making quorum for the last two meetings in October and November
- Quorum is very important
- The last two issues will be worked and forwarded to the Joint Committee with any changes by November

- Members with ideas and or questions were encouraged to reach out to Rodriguez and O'Sullivan

Closing

Jimerson expressed thank you to everyone attending. The meeting was officially closed at 3:47PM, EST.

**Next Meeting: Tuesday, October 08, 2024
1:00PM EST, 2:00PM CST, 10:00AM MST, 09:00AM PST**

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