

**Taxpayer Assistance Center Improvements Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, October 08, 2024**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer

Attendance

- | | | |
|---------------------|---------------|------------|
| • Richard Rodriguez | Stockton, CA | Chair |
| • Jim Simpson | Phoenix, AZ | Vice Chair |
| • Elizabeth Colvin | Austin, TX | Member |
| • Mary Lawler | Dearborn, MI | Member |
| • David Newingham | Henderson, NV | Member |

Member Absent

- | | | |
|----------------------|-----------------|--------|
| • Jackson Bauzon | Los Angeles, CA | Member |
| • Shequeila Birdsong | Amherst, NY | Member |
| • John Rodgers | Anchorage, AK | Member |
| • 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 |
| • 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:

- IRS has expanded the 2025 Direct File Program. They have increased the number of states to include Alaska, Connecticut, Idaho, Kansas, Maine, Maryland, New Jersey, New Mexico, North Carolina, Oregon, and Wisconsin. For the 2025 filing season, Direct File will support 1099's for interest income greater than \$1,500, retirement income and the 1099 for Alaska residents reporting the Alaska Permanent Fund dividend

- October 15, 2024, TAP Informational Session on Being a TAP Chair or Vice Chair Election will begin at 1:00PM, EST
- October 16, 2024, The Annual Report Team will have their meeting beginning at 3:00PM, EST
- October 17, 2024, Outreach Committee meeting will have their meeting at 2:00PM, EST
- October 17, 2024, Internal Communications Committee will have their meeting beginning at 3:00PM, EST
- October 24, 2024, The Joint Committee monthly meeting begins at 3:00PM, EST
- After today's meeting there will be one full committee meeting remaining and one round of subcommittee meetings

Chair Report

Rodriguez welcomed everyone to the call. The following updates were shared:

- Members were informed TAC has two full committee meetings remaining for the TAP year
- Today's meeting will be a summary of all accomplishments and finishing out the year
- Encouragement expressed for members to prepare their final efforts in getting their referrals completed. Put mind to paper and place issues in the Parking Lot for TAP year 2025 to hit the ground running
- Members were encouraged as the end of the year approaches to continue with the momentum
- The Joint Committee Chairs met to finalize the By Laws. They have another meeting coming up and will have the final information to share

Minutes Approval

TAC September 10, 2024, Minutes were approved with correction. Elizabeth Colvin motioned, and Mary Lawler seconded.

Member of Public

N/A

Issues Responses

Rodriguez shared the following updates:

- Issue 69548 response was received that it was already implemented prior to elevation. The subcommittee reviewed and discussed recommendation number seven. A partial agreement with the recommendation was made. TIGTA will monitor. They have statutory authority to follow up and requirements to follow up. Discussion was opened to members after Rodriguez summarized the response. Jim Simpson moved to accept the response and Elizabeth Colvin seconded.

Decision: Full Committee Consensus to accept IRS response and closure of the referral.

VITA TCE Update

O'Sullivan shared the following:

- Update was made to the form and shared with members
- Rodriguez will add the update to the Annual Report

Subcommittee Report

Subcommittee 1

O'Sullivan shared the following updates:

- Issue 66143, O'Sullivan pulled the record keeping research information from www.irs.gov and shared it with members. Subcommittee 1 will draft the reply to IRS sharing what they want to post. Rodriguez added he placed a links to each business and individual location in Teams Chat that was wanted on the access sheet. A copy will be shared with members
- Issue 67378, The Appointment System Subcommittee 1 needed additional information. Conchata Holloway shared the information with O'Sullivan. The information was forwarded to members. Rodriguez added Subcommittee 1 will do a review of process from the appointment set up to people being able to identify the phone number to call. They will develop questions to share with the SME requesting whatever matrix they may have on the appointment system. O'Sullivan will share the information with Holloway. Subcommittee will finalize the referral by the next full committee meeting

Subcommittee 2

O'Sullivan shared the following:

- Issue 66145, The VITA income limit. Jim Simpson stated Subcommittee 2 agreed to move the issue forward. Elizabeth Colvin provided members with emphasis to the VITA program in legislation that provided who the VITA program should serve. Simpson provided an overview of Subcommittee 2 recommendations for discussion. Rodriguez added the referral will be ready for the next full committee meeting to forward on to the Joint Committee. Members were asked for any suggestions

Screening Committee

Rodriguez shared the following:

- The Screening Committee did not have a meeting this month. O'Sullivan will schedule their meeting towards the end of October
- O'Sullivan added the November meeting will be the last meeting for the TAP year. He will run a new Screening inventory report and share with members and Jimerson

Outreach

Simpson shared the following updates for the Outreach Committee:

- Members have until November 30, 2024, to report hours

- As of September 05, 2024, Outreach Activity report total was nine hundred hours. There should be over two thousand hours reported. Members were encouraged between October and November; the committee needs to report up to fifty percent more activity than what is recorded. Members were encouraged to think outside of the box
- Simpson will participate in a care givers conference next week. He will share with participants information on dedicate waiver payments, other tax related information and share information about TAP. He will add the time spent
- Members were encouraged to record all time spent, acknowledge themselves for the activity done and record their hours

Internal Communications Committee

Simpson shared the following:

- ICC has been working on how to get public access into TAP meetings. They will pursue a listing on the Taxpayer Advocate Service portion of IRS under the Gov Delivery function. This is anticipated to be a more efficient option than establishing an independent email list to contact individuals
- A recommendation was sent to Special Projects on suggestions individuals not being able to provide positive or negative feedback on where it is in the process. This issue will be moved into ICC
- O'Sullivan added ICC members had an Ad Hoc meeting on last month. Kyle Kipple volunteered to take on an administrative position for the Facebook page. His suggestions included who will create content, post, admin. They are doing a lot of work to make sure a steady stream will continue to come from ICC and added onto the Facebook page

Action Items

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

- Forward September 10, 2024, Minutes to Kevin Brown for posting onto www.TAPSpace.org and to www.ImproveIRS.org
- Update the system with the acceptance of IRS response on Issue 69548 and close out
- Forward Issue 66145 to SA and the Attorney Advisor for their feedback
- Run a new inventory report for the Screening Committee and share with members
- Run a report on member activities and forward to members
- Add TAC information to the Annual Report showing what TAC has been working on and copy to members
- O'Sullivan is available for members needing assistance or have questions

Roundtable

Rodriguez asked for comments for the Roundtable:

- TAC final full committee meeting will be held on November 12, 2024

- Members were advised to be on the lookout for the ballots to vote for TAP 2025 Chair and Vice Chair

Closing

Jimerson expressed thank you to everyone attending. The meeting was officially closed at 3:58PM, EST.

**Next Meeting: Tuesday, November 12, 2024
1:00PM EST, 2:00PM CST, 10:00AM MST, 09:00AM PST**

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