

**Taxpayer Assistance Center Improvements Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, November 12, 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 |

Staff

- | | |
|----------------------|------------------------------|
| • Matthew O'Sullivan | TAP Program Analyst |
| • Rosalind Matherne | TAP Program Analyst |
| • Conchata Holloway | TAP Program Analyst |
| • Annie Gold | TAP Administrative Assistant |

Members of the Public

Norma Mendez

Quorum

Quorum was met.

Welcome and DFO Report

Susan Jimerson opened the meeting and welcomed everyone to the last full committee call for this year. An overview of the agenda was provided and the following updates:

- Once the new members for TAP 2025 are brought onboard to have a full panel, the committee meetings and official activities will begin.
- First and second year members were encouraged to continue doing Outreach and submitting suggestions for making improvement to customer service for the IRS.
- Congratulations expressed to Richard Rodriguez, David Newingham, and Shequeila Birdsong on their retirement from the TAP committee. Expressions of gratitude and appreciation extended to them all for their

commitment, dedication and work performed in TAP. Encouragement to not forget about TAP.

- Members were encouraged to have their updates entered on their Activity Report as soon as possible. The information will be used in the submissions for the President Awards by November 30, 2024
- Voting for the TAP 2025 National Chair and Vice Chair ballots are due by midnight on Thursday, November 14, 2024. Members were encouraged to vote for the candidate of their choice. The results will be shared on Friday, November 15, 2024, during the year end celebration for the graduates.
- First and second year members were reminded their committee preferences are due by November 22, 2024
- November 14, 2024, the Internal Communications Committee will have their final meeting beginning at 3:00PM, EST.
- November 15, 2024, TAP Member Graduation Ceremony will begin at 1:00PM, EST.
- November 15, 2024, Announcement of the TAP National Chair and Vice Chair Election results will be shared during the graduation ceremony.
- November 21, 2024, the last Outreach Committee meeting will have their meeting at 2:00PM, EST.
- November 21, 2024, The Joint Committee monthly meeting begins at 3:00PM, EST.

Chair Report

Rodriguez thanked everyone for being on the call.

Minutes Approval

TAC October 08, 2024, Minutes were approved as submitted.
Jim Simpson motioned, and Elizabeth Colvin seconded.

Member of Public

Norma Mendez from Taxpayers Inspector General for Tax Administration (TIGTA) had no comment.

Issues Responses

Rodriguez shared the following updates:

- Issue 69548 Subcommittee 1 recommended a feedback system be put in place. The referral was forwarded to IRS. IRS responded it was implemented prior to receiving the issue. Subcommittee 1 recommended closing this issue as accepting IRS response to have something in place by October 2025. Matthew O'Sullivan, the Analyst for TAC will monitor the implementation.
Jim Simpson moved to accept the recommendation to close and Elizabeth Colvin seconded.
Decision: Full Committee Consensus to close Issue 69548
- Issue 72473 Vita TCE Training response was discussed, and the members recommended closing this issue.

Simpson motioned and Colvin seconded.

Decision: Full Committee Consensus to close Issue 72473

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, Recordkeeping referral was submitted to IRS in TAP year 2023. IRS responded with a partial response and requested additional information. O'Sullivan stated this is an active issue. IRS is asking for clarification to make their decision. O'Sullivan will forward the information response to IRS and wait for their follow up.
- Issue 67378, Review of the Appointment System is a process the committee is going through. Access to the appointment system and how the appointments are done when individuals call in for an appointment. Rodriguez added Subcommittee 2 was added in on the discussion.

Rodriguez motioned to place this issue in the Parking Lot to be worked in 2025. David Newingham second the motion

Decision: Full Committee Consensus Place Issue 67378 in the Parking Lot

Subcommittee 2

O'Sullivan shared the following:

- Issue 66145, The VITA income limit. Subcommittee received the response and is ready to move forward. Jim Simpson stated Subcommittee 2 agreed to move the issue forward to the Joint Committee

Simpson motioned to forward to the Joint Committee and Elizabeth Colvin seconded.

Decision: Full Committee Consensus Forward Issue 66145 to the Joint Committee

Screening Committee

Rodriguez shared the following:

- The Screening Committee reviewed the issues.
- Majority of the issues were recommended for closure.
- The referrals to be reviewed next year: Issue 73359, 74152, and 74297 that are specific to TAC including items that may need to be considered or looked at to be combined with other referrals.
- The Screening Committee recommended three to go to TAC, nineteen to be referred to other subcommittees, and the rest to be closed for reasons; not systemic issues, outside the scope of TAP, or personal issues not identified as matters that involve TAP.
- Members were encouraged to be a part of the Screening Committee next year.

Newingham motioned to accept the Screening Report and Simpson seconded.

Decision: Full Committee Consensus accepted the Screening Report as submitted

Outreach

Simpson shared the following updates for the Outreach Committee:

- A copy of the total number of hours reported was sent to members by O'Sullivan showing up to seventy-five hundred hours.
- O'Sullivan will send one additional report to make sure all the data is correct.
- Members were encouraged to record their time.
- Jimerson responded to Newingham's inquiry on who determines when a member can move into the next three years. There is a three-year waiting period to reapply to TAP. It is not automatic reinstatement. The Recruitment package is going through the process to get to Treasury. A supplemental package has been submitted as well to bring on additional members next year.

Internal Communications Committee

Simpson shared the following:

- ICC voted to have the www.ImproveIRS.gov link added to the front page of www.IRS.gov page. They are working on the proposal.
- They are looking at revising a process for screening issues to better communication with the submitter on what the status of their issue.
- They are discussing updating the Facebook pages. Members have stepped up and are now posting stories.

Action Items

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

- Forward October 08, 2024, Minutes to Kevin Brown for posting onto www.TAPSpace.org and to www.ImproveIRS.org
- Update the system with the Screening Report
- Update the system to close Issue 69548 and Issue 72473
- Forward Issue 66143 the response to IRS when they ask for clarification.
- Place Issue 67378, IRS Appointment in the Parking Lot
- Forward Issue 66145, VITA Income Limit will be forwarded to the Joint Committee for approval.

Roundtable

Rodriguez thanked everyone for their support and asked for comments for the Roundtable:

- Members thanked Rodriguez for his support.
- Three years of quorum
- Special thank you expressed to Norma Mendez for her attendance.



Jimerson expressed appreciation to everyone and thanked Rodriguez and Newingham for their work for three years of service. Members were encouraged to attend the graduation ceremony.

Closing

Jimerson officially closed at 3:58PM, EST.

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