

**Taxpayer Assistance Center Improvements Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Wednesday, March 12, 2025**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer

Attendance

- | | | |
|---------------------|-------------------|------------|
| • Jim Simpson | Phoenix, AZ | Chair |
| • Jackson Bauzon | Los Angeles, CA | Vice Chair |
| • Elizabeth Colvin | Austin, TX | Member |
| • Quan Doan | Spring Valley, CA | Member |
| • Mary Lawler | Dearborn, MI | Member |
| • LaRee Lowman | Homewood, IL | Member |
| • John Rodgers | Anchorage, AK | Member |
| • Jennifer Reynolds | Tyler, TX | Member |
| • Alan Stancill | Starkville, MS | Member |
| • Joseph Tierney | Boston, MA | Member |

Member Absent

- | | | |
|--------------------|------------|--------|
| • Elizabeth Colvin | Austin, TX | Member |
|--------------------|------------|--------|

Staff

- | | |
|----------------------|---|
| • Matthew O'Sullivan | TAP Program Analyst |
| • Conchata Holloway | TAP Program Analyst |
| • Annie Gold | TAP Administrative Assistant |
| • Mejbeen Balsara | Taxpayer Services W&I Operation Support |

Quorum

Quorum was not needed for today's administrative meeting.

Welcome and DFO Report

Susan Jimerson opened the meeting and welcomed members to the call. A brief overview of the agenda was shared.

- Mejbeen Balsara from Taxpayer Services joined the call on today. She is the point of contact and works closely with Conchata Holloway to get response back from IRS and make sure a SME is available when requested
- Today is the official launch of TAP 2024 Annual Report. It is posted on www.ImproveIRS.org
- Members were encouraged to go onto www.ImproveIRS.org and view the report

- The Staff is back in the office and available to assist with questions or anything members may need to conduct TAP business

National Office Update

Shawn Collins welcomed members to the meeting and shared the following National Office updates:

- The Staff is back in the office
- There will be no travel FTF meeting this year due to budget constraints
- Collins, Jimerson and Cedric Jeans are working with TAP National Chair and Vice Chair to organize a virtual meeting. The meeting will be limited to two hours. It is hopeful at some point a FTF for the Joint Committee and the Tax Forums will be held. Additional information will be shared. Members with questions were encouraged to send them to Collins. She will respond as soon as she receives the message
- The National Taxpayer Advocate, Erin Collins sent an email message requesting a response from TAP. Members were asked to provide topics with feedback on the most serious problems Taxpayers are facing. Make sure to provide a topic and a blurb in the response

Chair Report

Jim Simpson welcomed members to the call. He assured members he is available to assist when needed. He will respond to email within a day. Members with questions were encouraged to reach out to Simpson.

Minutes Review

TAC February 19, 2025, Minutes were reviewed for accuracy or grammatical errors. Approval will be done during the next full committee meeting.

VITA Project Review

Simpson stated Project 77943 VITA Product Review requested feedback on some of their products' training and reference materials. He provided the following:

- Publication 4011, Teach Foreign Students Scholar, and Volunteer Resource Guide used to assist foreign students and with certain forms to complete
- Publication 4012, Quick Reference Guide to answer questions
- Publication 4491, Detailed
- Publication 4491X,
- Publication 6744, Test Booklet
- LinkIn Learn was suggested to go for the exam
- Matthew O'Sullivan posted the information on www.TAPSpace.org and asked member if there were any questions
- Balsara added members can send questions and requests for SME to her. Jimerson stated the requests was sent by Holloway to Balsara and the response is needed quickly as the members are awaiting a response

Subcommittees Report

Subcommittee 1

Jennifer Reynolds shared the following updates for Subcommittee 1:

- Project 77942, F8821 Taxpayer received Tax information for a third party
- Members reviewed and discussed the form and the VITA Product Review
- Simpson asked for clarification between forms 8821 from 4868
- F8821 gives the third party the right to information but no rights to represent or settle on the Taxpayer's behalf

Subcommittee 2

Joseph Tierney shared the following updates for Subcommittee 2:

- Subcommittee 2 is working on Project 77881, Accounts Transcripts. They are trying to obtain input from Tax Practitioners
- Members discussed the project and are trying to understand the needs and accessibility of the Taxpayers
- Information was reviewed on the website along with the types of transcripts available
- Jimerson added TAP has practitioners and will be a good source of information for questions and feedback
- Simpson added he is available if needed
- O'Sullivan added information is available at the Tax Forums and during the screening of information from the public would be a good way to capture and incorporate into the project

New Issue Screening Report

Jackson Bauzon shared the following updates for the New Issue Screening report:

- The committee had their meeting on March 03, 2025
- The report was posted on www.TAPSpace.org by O'Sullivan
- As of February 28, 2025, there were a total of thirty-two issues. Twenty-two issues that were out of scope. Two issues for TAC to work. Five issues assigned to other committees, and one for other
- The committee will continue to review the report working with O'Sullivan and the team to address the issues
- O'Sullivan added Bauzon volunteer to be the lead on this committee. The Screening Committee reviews all the issues, completes the Screening Report, recommends the report to the full committee. The full committee votes to endorse or not endorse what the Screening Committee has done.
- O'Sullivan will schedule a Screening Committee meeting before the next full committee meeting. Members were encouraged to attend the meeting. Members who may want to be a part of the Screening Committee should contact O'Sullivan and Bauzon

Outreach

Quan Doan shared the following updates for the Outreach Report:

- The Outreach meeting is scheduled for March 20, 2025
- Members were encouraged to continue to log in all activities and efforts

- The Activity Report will help determine the type of volunteer award received at the end of members term with TAP

Internal Communications Committee (ICC)

Doan shared the following ICC updates:

- The April Newsletter article is due next week
- Fred Smith will share information after the committee has their first meeting
- O'Sullivan shared a prior Newsletter for members to reference
- Simpson pointed out preparing the article is not difficult

Action Items

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

- Upon receiving information from IRS, dates and time for the VITA Product Review will be shared with members
- Determine what dates will be available to schedule the Screening Committee's meeting and share the invite with members
- Research information on the www.IRS.gov website relevant to both Subcommittees issues being work. This will include the VITA Product Review and the Screening Committee issues. The information will be shared with members
- All relevant information will be shared with members
- Thank members for doing their reports and to all members for attending the meeting. O'Sullivan is available when needed

Program Owner Report

Mejbeen Balsara shared information for the Program Owner Report:

- Assured members she would be available to assist in getting a SME to come to the meetings to provide information
- Jimerson will speak offline with Balsara for actual times to meet for the virtual meetings for discussions

Roundtable

O'Sullivan asked for comments for the roundtable discussions:

- Lawler joined the Screening Committee
- Rodgers inquired about the FTF. Jimerson confirmed there will be no FTF due to the budget constraints
- Reynolds inquired what is meant by saying not an open meeting. Jimerson explained TAP is a Federal Advisory Committee that has to announce the meetings in the Federal Register to allow anyone who would like to come, to participate in the meeting if they would like to
- Doan inquired about the Outreach materials needed to conduct Outreach activities. O'Sullivan explained there are SpeakUp brochures. The support staff will be sending them out to members. On the Outreach Tool Kit there is a lot of information available for doing Outreach. Annie Gold shared the information will go out this week.

- Simpson added he will do an event on Friday with a table to talk about TAP. LTA will be there to speak about TAS. LITC will be there. He suggested to keep the conversations A-political
- Jimerson added if there is a continuing resolutions and funds are not available, there maybe a virtual Tax Forum this year. More information to come

Jimerson expressed appreciation to everyone for being on the call. Thank you to Simpson, Doan, Reynolds, and Tierney for leading and reporting for their committees. Additional information will be shared on the VITA Product Review and any information that is relevant to TAP.

Closing

Jimerson officially closed the meeting, at 1:57PM, EDT.

**Next Meeting: Wednesday, April 09, 2025
1:00PM EDT, 2:00PM CDT, 10:00AM MDT, 09:00AM PDT**

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