

**Taxpayer Assistance Center Improvements Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Wednesday, July 9, 2025**

Designated Federal Officer

- John A. Lipold Supervisory Management and Program Analyst

Attendance

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

TAP Staff

- | | |
|----------------------|---------------------|
| • Jose Cintron | TAP Program Analyst |
| • Saul Hernandez | Acting TAP Director |
| • Matthew O'Sullivan | TAP Program Analyst |
| • Fred N Smith Jr. | TAP Special Analyst |

IRS Staff

- Mejbeen Balsara Taxpayer Services Program Analyst

Members of the Public

N/A

Welcome/Opening Meeting

Lipold opened the meeting and welcomed everyone on the call.

Quorum

Quorum was not met.

Welcome and National Office Report

Hernandez indicated that "Speak up" brochure is under revision for both the Spanish and English versions. In addition, the June report to congress published available in the IRS website, but hard copies can be provided to the members

upon request. The Vita program is in the early stages of recruiting and more information will be provided when available.

Smith provided the dates for the Joint Committee planning meeting. The meetings are scheduled for August 12, 2025, and August 19, 2025, and it will be virtual. During the meetings the Chairs & Vice-Chairs will review what went well and what to improve. Recommendations from all members are accepted prior to the meeting.

Balsara talked about the VITA product review and offered help and guidance to the committee analyst. Simpson requested updates on prior meetings concerning the VITA project review. Balsara offered to talk with Simpson after the meeting for an update.

Chair Report

Simpson pointed out issue with making quorum. Suggestions were requested to the members. Simpson indicated it is still time to get the work done and encouraged the members to maintain a positive attitude to accomplish the committee goals.

Minutes Review

April 9, 2025, minutes tabled to next month

May 14, 2025, minutes tabled to next month

June 11, 2025, minutes tabled to next month

Public Comment

N/A

Committee Updates

- **Project 77943 VITA Product Review**

Simpson indicated he has participated in several reviews and meeting, but will wait for an update from IRS representative (Balsara)

- **Project 66143 Recordkeeping Tip Sheet**

Referral was received from the IRS did not adopt any of the recommendations. Several of the recommendations may need clarification and committee members decided to make additional research before deciding if a rebuttal will be submitted or not.

Subcommittees Report

Subcommittee 1

- **Project 77942 Form 8821**

Simpson informed Referral was combined with issue 77687 and Tax Forms and Publications will take the lead and present the project to the Joint Committee in July.

Subcommittee 2

- **Project 77881 Account Transcripts**

Simpson went over the referral and explained updates to the Goal Statement section and the recommendations. Referral will be forward for SA/AA for review and will be discussed during the next full committee meeting.

New Issue Screening Report

Unable to vote on reports because quorum was not met.

Outreach

O'Sullivan stated TAP will not have an official booth in the Tax Forums, but members are encouraged to talk about TAP. The upcoming dates are:

New Orleans - Aug 5-7

Orlando Aug 26-28

Baltimore Sep 9-11

San Diego - Sep 16-18

- Activity Reports

O'Sullivan indicated TAP is working on an updated version of the activity report. More information will be provided when available.

Internal Communications Committee (ICC)

Smith explained the merge of ICC with Outreach, but the committee has not been completely defined in terms of duties and responsibilities. Vice Chairs are required to attend meetings, but other members are welcomed.

- Newsletter Article

August- Jennifer Reynolds

Action Items

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

- 66143-will look again on IRS_response
- Vita product review- will provide information as soon as received
- 77881 will forward for review to SA/AA
- will provide update on activity report when available

Roundtable

O'Sullivan offered help at any time if any questions or concerns comes up. Matt acknowledged the members contributions.

Also, Simpson encouraged members to reach out to him to move forward with suggestions and recommendations.

Closing

Lipold officially closed the meeting, at 1:33 PM, EDT.

**Next Meeting: Wednesday, August 13, 2025
1:00PM EDT, 2:00PM CDT, 10:00AM MDT, 09:00AM PDT**