

**Taxpayer Assistance Center Improvements Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Wednesday, April 9, 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 |
| • Jennifer Reynolds | Tyler, TX | Member |
| • John Rodgers | Anchorage, AK | Member |
| • Alan Stancill | Starkville, MS | Member |
| • Joseph Tierney | Boston, MA | Member |

Member Absent

- LaRee Lowman Homewood, IL Member

TAP Staff

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

IRS Staff

- | | |
|------------------------|---------------------------------------|
| • Mejbeen Balsara | Taxpayer Services Operation Support |
| • Martina Coates Nance | Supervisory Manager Operation Support |

Members of the Public

- Vicki Urbanik Randal

Quorum

Quorum was met.

Welcome and National Office Report

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

Upcoming meetings:

The Outreach meeting is scheduled for April 17, 2025 1:00 pm ET

The first 2025 Joint Committee is scheduled for April 24 , 2025 2:00 pm ET

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 November 12, 2024, February 19, 2025, and March 12, 2025 Minutes were reviewed and approved. Matt O'Sullivan will post them to TAPSpace

Public Comment

Vicki Urbanik Randal introduced herself as a TAP Alternate. She called into the meeting to observe and learn about the TAP process.

VITA Project Review

Jim Simpson reminded the members that IRS has requested a list of volunteers for Project 77943 VITA Product Review. Responses are due by April 25, 2025. The members should send responses to Matt O'Sullivan.

Subcommittees Report

Subcommittee 1

- Jennifer Reynolds shared the following updates for Subcommittee 1:
Project 77942 Form 8821- Prior to the meeting, Matt sent form & instructions for review and the Form 15214 was initiated. Members came up with the following recommendations:
 1. Put an expiration date on the form 8821 or create a space for the taxpayer to indicate the desired expiration date
 2. Put a disclaimer on the instructions, indicating the form will remain active until the taxpayer revokes it or a new form is filed.

The listed members will complete the following items of the Form 15214 within the next two weeks:

Background, research & analysis- Jack Bauzon
Benefits & Barriers- Jennifer Reynolds
Summary & Conclusion-Quan Doan

Subcommittee 2

Joseph Tierney shared the following updates for Subcommittee 2:

- Project 77881 IRS Account Transcripts- it seems like the IRS is asking for feedback from the perspective of tax professionals. Jim stated that project could be divided in 2 parts: one version for taxpayers and the other for tax professionals. Also, Simpson and Rodgers will request feedback from the practitioner's community within their area. Simpson suggested to unmask the EINs on the wage and income transcripts. Rodgers stated of possible issue with disclosing EINs, due to potential fraudulent K1 filings. Jim volunteered to complete the following parts of the Form 15214: Background, research and analysis, Benefits and barriers, and Summary and conclusion. The due date to gather recommendations from tax practitioners was established for 3 weeks.

New Issue Screening Report

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

- The committee had their meeting on March 24, 2025. There were 25 Issues that were dropped as outside the scope of the TAP. Two Issues kept by the TAC for further review. Five Issues referred to other Committees.
- **Outreach**
- Quan Doan provided an update on the activities of the Outreach Committee and reminded the members to update their Activity Reports.

Internal Communications Committee (ICC)

Quan Doan shared the following ICC updates:

- The May Newsletter article is due on April 25, 2025. Matt O'Sullivan solicited volunteers for the upcoming Newsletter articles. There was no volunteer for the May Newsletter.
- 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:

- Post the approved Minutes to TAPSpace
- Update the Committee inventory based on the approved Screening Report
- Provide updates on any information received from IRS
- Will be available to Members as needed.

Roundtable

- Vicki Urbanic Randal thanked the Members for being able to attend the meeting and said she learned a lot from observing.

- 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 1:34 PM, EDT.

**Next Meeting: Wednesday, May 14, 2025
1:00PM EDT, 2:00PM CDT, 10:00AM MDT, 09:00AM PDT**