

**Taxpayer Assistance Center Improvements Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Wednesday, May 14, 2025**

Designated Federal Officer

- Susan Jimerson Designated Federal Officer

Attendance

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

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

- Martina Coates Nance Supervisory Manager Taxpayer Services

Members of the Public

N/A

Welcome/Opening Meeting

Jimerson opened the meeting and welcome all who joined.

Quorum

Quorum was not met.

Welcome and National Office Report

Not able to get name tags and business cards budget cuts. Working on JC meeting in July. Will be virtual.

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 May 22, 2025, 1:00 pm ET

The first 2025 Joint Committee is scheduled for May 22, 2025, 2:00 pm ET

Chair Report/ Volunteer Income Taxpayer Assistance (VITA) Project Review

Simpson reported revising the test booklet that VITA volunteers use. They are also revising the answer sheets and the test returns. Simpson said they are still working on this part of the issue along with reviewing the reference guide.

Minutes Review

TAC April 9, 2025, minutes tabled to next month

Public Comment

N/A

Subcommittees Report

Subcommittee 1

- Project 77942 Form 8821

O'Sullivan reported possibly using suggestions from other committee's research to resolve this issue. The issue is still being worked.

Subcommittee 2

- Project 77881 Account Transcripts

Simpson reported working with the Office of Online Services (OLS) spoke of previous work being done regarding how the taxpayer discerns this form and what can be improved. We looked from practitioner's perspective. Stacy Cloyd from Special Projects corresponded with Simpson regarding working a similar project 63737 Data on Wage and Income Transcripts. Simpson indicated they are looking for full Employee Identification Numbers (EINs).

The IRS' response was because it is available upon request, this has already been implemented. Taxpayers are looking to have this information unmasked without having to take extra steps to ask for it. Simpson spoke about this to minimize the burden on taxpayers since this is not social security numbers. Simpson inquired about why they can't automatically be unmasked, which is a goal of the project.

New Issue Screening Report

O'Sullivan reported screening May 8, 2025:

There were a number of issues reviewed with many of them dropped because they were individual or tax issues outside the scope of TAP. Some of them were associated with existing issues, which we were able to close them. Some were unclear or inconclusive and one issue required further research. Simpson will

write about an issue related to the VITA review project. Simpson will write about an issue going to the Toll-Free phone Line committee regarding getting a person on the phone for assistance.

Outreach

- Quan Doan provided an update on the activities of the Outreach Committee

Doan understood limitations in outreach activities due to budget constraints and spoke about several members doing outreach via personal social media accounts. Doan reminded members to update their activity reports with all TAP activities.

Internal Communications Committee (ICC)

Quan Doan shared the following ICC updates:

- Doan thanked O'Sullivan for doing the May newsletter article.
- The schedule has been made through the end of the year.
- Doan will help if you need it.

Action Items

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

- O'Sullivan will pull activity reports for Chair, Vice-Chair and members
- Minutes tabled to next month
- Doing research on issue with Simpson

Roundtable

Simpson inquired about the Acting Commissioner; Collins responded Michael Faulkender. O'Sullivan spoke about an issue concerning VITA instructions taxpayers wanting to file married filing separate. Simpson responded that can not be done at a VITA site, but taxpayers could seek assistance through AARP.

Jimerson announced she is retiring at the end of this month after 35 years with the service. Jimerson said the TAP brings such a special enhancement to the IRS and is the voice for the voiceless. Collins will retire at the end of the month after 43 years of service. Collins thanked the service for helping her and her family through all of their moves. Collins reminded the committee that TAP is needed and does very important work for the taxpayers and is needed.

Closing

Jimerson officially closed the meeting, at 1:36 PM, EDT.

**Next Meeting: Wednesday, June 12, 2025
1:00PM EDT, 2:00PM CDT, 10:00AM MDT, 09:00AM PDT**