



**Taxpayer Communications Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Thursday, April 13, 2023**

**Designated Federal Officer**

- Susan Jimerson                      TAP West Chief

**Attendance**

- Melanie Almeida                      Sandpoint, ID                      Member
- Denise Besson                      Trufant, MI                      Chair
- Michelle Brookens                      Taylorville, IL                      Vice Chair
- Tracey Randall-York                      Ontario, CA                      Member
- Candace Smith                      Mustang, OK                      Member
- Joanne Thurston                      Marietta, GA                      Member
- James (Jim) Wiseman                      Brentwood, TN                      Member

**Members Absent**

- Richard Bell                      Corpus Christi, TX                      Member
- Ruth Guyon                      Bellevue, NE                      Member

**Staff**

- Frank Bustos                      Acting, TAP Director
- Conchata Holloway                      TAP Program Analyst
- Hannah Jair                      TAP Program Analyst
- Rosalind Matherne                      TAP Program Analyst
- Matthew O'Sullivan                      TAP Program Analyst
- Annie Gold                      TAP Administrative Assistant

**Roll Call**

Annie Gold conducted the roll call.

**Quorum**

A quorum was met.

**Welcome and DFO Report**

Susan Jimerson opened the meeting and welcomed everyone to the call. A review of the agenda was shared.



### **National Office Update**

Frank Bustos greeted members and welcomed everyone to the call. He stated the following was brought to his attention by Erin Collins, National Taxpayer Advocate. She wants members to know how important they are to the entire income tax planning for our country. Some of the recommendations submitted by TAP have made some fantastic impacts. The income tax filing date is approaching.

- Members were reminded they are held to a higher standard than normal Taxpayers
- TAP members represent their states as representative of the TAP panel
- The deadline to file is approaching. Members were encouraged to file taxes timely
- If needed, file for an extension remember this is not a waiver to not pay the tax and taxes are still required to be paid timely
- If anyone hasn't filed taxes in the past three years and have a filing requirement, make sure to do so as soon as possible
- Compliance checks have been ordered and are ready for each member of TAP. Reports will be sent to Bustos withing the next week. If anyone has a requirement from the last ten years and have not paid, members were encouraged to file an extension or arrange an Installment Agreement
- Any taxes owed and not in an arrangement stage make sure to work something out with IRS to get on a payment plan or installment agreement. His expectation is to make sure no member of TAP will be lost due to non-compliance
- TAP members will be in Washington, DC next month. There will be some heavy hitters invited to the meeting. The start time has been pushed back to 2:00 PM, EST on May 15, 2023. Annie Gold will be reaching out to each member to arrange travel reservations
- Bustos will reach out to Gold and Kevin Brown to get the date and time arranged for travel training for each member. The training will provide information on getting reimbursed timely and what will be needed to get the reimbursements process as quickly as possible. The training will be held within the next seven to ten days. Information will be shared
- Members were encouraged to consider gathering for possible dinner on Thursday night as a committee. Members were encouraged to bring cash to make things easier. Let the Chair and Vice Chair know if who is interested
- Jimerson encouraged members to contact Annie Gold at (346) 227-6784 with any questions pertaining to travel. She will be able to answer and assist with travel. Her hours are 8:00 AM, CST until 4:30 PM, CST
- The schedule for the FTF meetings: TCC meets on  
Monday, May 15, 2023, at 2:00 PM, EST  
Tuesday, May 16, 2023, all day



Wednesday, May 17, 2023, all day training session. All six project committees and Staff will be there. Speakers have been lined up to be there including the National Taxpayer Advocate and other speakers from IRS. Members were encouraged to attend the meeting

### **DFO Report**

Jimerson shared the following DFO Report:

- ICC will have their first meeting on April 18, 2023, beginning at 12:00 PM, EST
- The Joint Committee will have their first official meeting on April 26, 2023, beginning at 2:00 PM, EST
- The Outreach Committee is working on the date and time for their meeting.

### **Chair Report**

Denise Besson welcomed members. Michelle Brookens was not on the last call and her confirmation as TCC Vice Chair was not done. Nomination to have Brookens as Vice Chair was made by James Wiseman. Melanie Almeida seconded. Michelle Brookens accepted the position.

- This is the first full committee meeting. The subcommittees have been working. The full committee will decide on how to move forward
- TCC next meeting will be
- March and April Minutes will be approved during the FTF meeting in May
- Members were encouraged to reach out to other members who will not be attending and encourage them to attend

### **Recruitment and Outreach**

Fred Smith introduced himself to the committee. He is the analyst overseeing Recruitment and the Outreach program.

- The deadline for Recruitment has been extended out to April 30, 2023. Members were encouraged to share the opportunity with friends. There is a link on [www.USAJOB.gov](http://www.USAJOB.gov) for anyone interested to apply. Members with questions can reach out to Smith and Holloway
- Outreach will be scheduling their meeting soon. Smith will be contacting the National TAP Vice Chair, Angela Madison for a definite date. They may have an impromptu meeting before the Joint Committee meeting. He will also reach out to Brookens to help set the meeting date. Once the date and time has been set, all Vice Chairs from the six Project Committees will be in attendance. Members are encouraged to attend the meetings. Conducting Outreach is a good way to get issues and hearing what the community is saying. Smith and Holloway are available to assist and answer questions



### **Program Owner Report**

Mejbeen Balsara introduced herself. She is the Program Owner from W&I in place to assist TAP. She expressed looking forward to working with each member.

### **Subcommittee Report**

#### Subcommittee 1

James Wiseman introduced himself and thanked the Staff for their assistance. Subcommittee 1 met on last week. It was very productive. The members are Melanie Almeida, Michelle Brookens, Candace Smith and Wiseman. He shared the following updates:

- Issue #43684, Status of Amended Tax Returns and communication on how long it takes to process the returns. This issue is carried over from the past committee. IRS did update their communication. Subcommittee 1 recommends acceptance of IRS response. Wiseman made the motion to accept IRS response and Brookens seconded  
**Decision: Full Committee Consensus accept IRS response to Issue #43684**
- Issue #54250, Increase E-File Forms and Tax Returns. This issue is being tabled with questions for the Subject Matter Expert (SME). Holloway will schedule the SME. This issue is not ready to present to the Full Committee
- Issue #48294, Entities with Multiple EINs. Subcommittee 1 will be researching to learn more about the process and request a SME for questions. Wiseman anticipates making improvement to IRS process to service for Taxpayers
- Issue #66193, Effectively Measuring Outreach. Subcommittee 1 has members with experience in this area. They have volunteered to lead Monthly communication through September. They are looking forward to meeting everyone in DC

#### Subcommittee 2

Joanne Thurston stated Subcommittee 2 met on April 05, 2023. It was a good meeting. Brookens, Besson, Guyon and Thurston attended. They agreed to accept IRS response. Thurston made the motion to accept, and Almeida seconded.

**Decision: Full Committee Consensus accept IRS response for Issue # 54248**

- Issue #66193, Subcommittee 2 will be sending questions to Holloway and anticipate discussing with the Full Committee next month
- Issue #51229, IRS Pro Tool. The IRS is in the process of updating. COVID Relief is not in effect. Subcommittee recommendation is to close this issue. Brookens motioned to close, and Almeida seconded.

**Decision: Full Committee Consensus Close Issue #51229**



### **Screening Committee Update**

Holloway informed the committee the Screening Committee has not scheduled their meeting. She will be sending an email message to all members with the date and time. Members were encouraged to review and vote prior to going to the FTF. A lead person will be selected at that time. She is looking forward to seeing everyone in DC. Jimerson added the report maybe long, but the full committee will be needed to screen the issues remaining. Everyone will have the opportunity to see what Taxpayers are saying.

### **Outreach Report**

Brookens stated the Outreach Committee has not had a chance to meet yet. She has reviewed the Activity Report

- The Outreach committee has 8.5 hours of Outreach to an audience of seventy-three. This is a good start for the first couple months
- Members were reminded to complete the Activity Report and post their activities; email communications, meetings, pre-reads and anything related to TAP.
- Member with questions on completing the reports were encouraged to reach out to her and Holloway for assistance

### **Internal Communications Committee**

Besson stated the ICC has not met yet. Their first meeting is scheduled for April 18, 2023, beginning at 12:00 PM, EST. ICC will report out next during next month meeting. Matthew O'Sullivan asked if Besson had received the pre-read information. Besson acknowledged she had received it. The pre-reads are posted on [www.TAPSpace.org](http://www.TAPSpace.org)

The articles are due by the twenty-fifth of each month.

Holloway added the template has been shared with members. Brookens volunteered to write the article for May. Besson will write it for June, Almeida will submit for July, Candace Smith will cover August, and Wiseman will write the article for September. Member who has not volunteered was asked to volunteer to cover October and November.

### **Action Items**

Holloway shared the following Action items:

- Close Issue #43684 in the system.
- SME attendance request will be submitted to Rosalind Matherne
- Follow up with additional questions from the subcommittees to forward to Matherne
- Close Issue# 54248 and Issue #51229
- Vote on the prior meeting and today's minutes on May 16, 2023
- Call Holloway with questions or if anyone is needing assistance



### **Roundtable**

- Almeida shared she is impressed with the pre-read and subcommittee work being done. It is impressive with the process and glad to see. IRS is taking the work from TAP seriously and there is a positive impact for the work
- Brookens state while doing Outreach with financial planning office, the Taxpayers surprised with how the process moved quickly through the grassroots approach. After speaking with them on the pre-reads, meetings, and process it is an eye opener
- Besson stated she received a phone call from the Taxpayer Advocate in Michigan. She was asked to come to a meet and greet. A flyer was shared and Besson will forward to member to use in Outreach
- Tracey Randall-York joined the call

Jimerson expressed thank you to all who joined the call. More information will be coming on the FTF meeting: May 15/16, 2023, for the committee meeting portion and on May 17, 2023, the all-day training will be held.

### **Close**

The meeting was officially closed at 12:53 PM, EST.

**Next Meeting: Face to Face Meeting**

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