

**Taxpayer Communications Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, May 16, 2023**

Designated Federal Officer

- Susan Jimerson TAP West Chief

Attendance

- | | | |
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| • 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 |
| • Richard Bell | Corpus Christi, TX | Member |

Members Absent

- | | | |
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| • Ruth Guyon | Bellevue, NE | Member |
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Staff

- | | |
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| • Conchata Holloway | TAP Program Analyst |
| • Hannah Jair | TAP Program Analyst |
| • Matthew O’Sullivan | TAP Program Analyst |
| • Annie Gold | TAP Administrative Assistant |

Roll Call

Conchata Holloway conducted the roll call.

Quorum

A quorum was met.

Welcome, DFO Report and National Office Update

Susan Jimerson opened the meeting and welcomed everyone to the first face to face meeting in 4 years and the first face to face for all of TAP in 10 years. Jimerson welcomed everyone on the call and thanked the members for the time and effort in coming to the meeting and helping with referrals and issues. Holloway shared the pre-reads in the folders and Jimerson reviewed the agenda and discussed housekeeping items.

National Office Update

Jimerson gave the DFO and National Office Reports. Frank Bustos was the DFO in another meeting. Tomorrow, May 17, 2023, is the all-day training for all the committees. The NTA and Systemic Advocacy offices will give presentations, along with the Taxpayer Experience Office. The National TAP Chair and Vice Chair will also give presentations. The Internal Communications Committee will meet on May 23, 2023, the Joint Committee will meet on May 30, 2023, at 12:00 pm ET. The recruitment period for new members ended on April 30, 2023. We will start the interview process soon. More information will be provided later.

Chair Report

- The Committee Chair, Denise Besson, welcomed all the members to the face-to-face meeting. Besson reported out on the subcommittee meeting dates for June 2023. Subcommittee 1 is scheduled June 1, 2023, Subcommittee 2 is scheduled for June 7, 2023. Denise motioned to have 1 subcommittee meeting on June 1st hear the SME discuss issue 66193, and the full committee will still meet on June 8, 2023. **The members agreed by consensus.**
- Meeting minutes for March 29, 2023, **were approved by consensus.**
- Meeting minutes for April 13, 2023, **were approved by consensus.**
- Besson requested Public Comment, no public on the call.

Program Owner Report

Mejbeen Balsara, was not available for the meeting.

Subcommittee Report

Subcommittee 1(SC1) Jim Weisman thanked everyone for showing up in Washington DC and provided the following updates
SC1 is awaiting responses from IRS for issue 54250, Increase E filing rate.

- ID 2340, IRS should digitize paper returns for more automated processing 5.6% are still paper. IRS Is working on this.
- ID 2341, prior year returns should be e-filed using do it yourself software, still under consideration.
- ID 2342, Online Account Adoption when returns filed. This was not adopted; questions have been sent up requesting additional information. We are still waiting IRS response.
- ID 2343, IRS should send online account invitations to taxpayers. Online Non-adopt committee agreed with IRS response to non-adopt.
- ID 2344, Should let trusted 3rd parties set up online accounts reassign to PGLD no response received.



- ID 2345, TAS should invite taxpayers that have been to TAS to sign up for online accounts. Reassigned to TAS, no response received.
- ID 2346, Online IRS should invite all taxpayers. Non-Adopt
- ID 2347, IRS send Invite to all US citizens living abroad. Non-adopt not cost effective. Committee agreed with IRS
- ID 2348, Place online account info on all notices still being worked on
- ID 2343, 2346 and 2347 responses from IRS accepted by the full committee.

Issue 48294 Entities with Multiple EINs, there are questions submitted awaiting response

Issue 66193. Measuring Outreach. A SME has been requested to meet with Subcommittee 1 & 2 on June 1, 2023, to respond to questions.

Subcommittee 2

Joanne Thurston provided the following updates:

- Issue 54248 Still awaiting answers from IRS
- Issue 52167 Referral sent to IRS awaiting response.

Screening Committee Update

- Melanie Almeida volunteered to lead the screening committee for the face to face. She's not on the screening committee but will attend when her schedule permits. Committee agreed to close the following related issues 51071, 51407, 51448 51658, about creating an online portal so that taxpayers can email direct questions to the IRS. Also, close issues 52953, 58294, 59558, 50448, 51229, 51687, 51745, 42953. The committee voted on the screening report and agreed by consensus

Outreach Committee

Michelle Brookens stated the outreach committee met on April 25, 2023, and discussed the need to increase connection with younger taxpayers, reentering citizens, and ex-offenders. Brookens encouraged everyone to contact their Local Taxpayer Advocates for more outreach opportunities and to keep their member activity reports up to date. Next Outreach meeting TBA.

Internal Communications (ICC)

Besson shared Rick Rodriguez was voted in as the Chair for ICC and our very own Melanie Almeida was voted as Vice Chair. ICC is currently working on

ImproveIRS.org, the Speak Up brochure, and social media Facebook page. The next meeting will be on May 23, 2023, Hannah Jair will be the Analyst. The TCC newsletter articles are due by the twenty-fifth of each month. Besson encouraged those who haven't already signed up to do so. Besson reminded everyone 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:

- Cancel the Subcommittee meeting for June 7, 2023.
- Follow-up with the JC Analyst, Rosalind Matherne to ensure a SME will be in attendance for the SC1 meeting on June 1, 2023.
- Close Issues from the screening report
- Provide March and April meeting minutes to Kevin to post
- Call Holloway with questions or if anyone is needing assistance

Roundtable

- Jim Wiseman indicated we have a good group to work with and it's a pleasure seeing everyone.
- Holloway thanked everyone for their participation and efforts in working the issues.

Jimerson expressed thank you to all who showed up and the meeting was officially closed at 2:53 PM, EST.

Next Meeting: June 8, 2023, 12:00 pm ET

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