

**Taxpayer Communications Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Thursday, August 10, 2023**

Designated Federal Officer

- Susan Jimerson TAP West Chief

Attendance

- | | | |
|-----------------------|---------------|--------|
| • Melanie Almeida | Sandpoint, ID | Member |
| • Denise Besson | Trufant, MI | 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 |
| • Michelle Brookens | Taylorville, IL | Vice Chair |
| • Ruth Guyon | Bellevue, NE | Member |

Staff

- | | |
|----------------------|------------------------------|
| • Cedric Jeans | Acting, TAP Director |
| • Conchata Holloway | TAP Program Analyst |
| • Matthew O'Sullivan | TAP Program Analyst |
| • Hannah Jair | TAP Program Analyst |
| • Rosalind Matherne | TAP Program Analyst |
| • Annie Gold | TAP Administrative Assistant |
| • Mejbeen Balsara | Wage & Investment |

Quorum

A quorum was met.

Welcome and DFO Report

Susan Jimerson opened the meeting and welcomed everyone to the call. The agenda was reviewed. The following updates were shared:

- August 15, 2023, Internal Communications Committee (ICC) beginning at 12:00 PM, EST.

- August 16, 2023, Outreach will have their monthly meeting beginning at 11:00 AM, EST. This committee is lead by the National Vice Chair, Angela Madison
- August 28, 2023, Joint Committee's monthly meeting beginning at 3:00 PM, EST. All the Chairs, National Chair and National Vice Chair review referrals to be considered.

National Office Update

Cedric Jeans greeted everyone attending the call. The following National Office updates were shared:

- There have been some Staffing changes; Frank Bustos has gone back to his position with the Low-Income Tax Clinic in TAC, Jeans will be Acting TAP Director until a permanent Director has been selected, Robert Rosalia will be Acting TAP East Manager
- Some opportunities to contribute to the most serious problems the National Taxpayer Advocate, Erin Collins is tackling has presented itself. One is on the International ITIN issue. An email solicitation will be sent for members participation in a focus group coming on September 07, 2023. Members with questions were encouraged to reach out to Conchata Holloway or respond to the email.
- The Joint Committee Planning Session will be held at the end of the month. The Chairs of this committee will discuss plans for the 2024 TAP year. Discussions will be held on potential projects, survey results and ways to improve the program. Member were encouraged to share any ideas or thoughts.
- The News Release shared information on the Digitalization of a lot of IRS paper documents. Documents will be scanned as soon as they are received. This effort will be pushed forward requiring a lot of manpower and hours.
- The TAP year is rounding to the end. Members with any referrals or anything to be included in the Annual Report were encouraged to put the pedal to the metal and get it in
- Members with questions were encouraged to reach out.

Chair Report

Denise Besson provided expressions of appreciation to members for their hard work and for all they do in TCC. A special thank you for members attending to assure quorum was met.

Minutes Approval

- June 08, 2023, Minutes were approved. Melanie Almeida moved to approve and Besson seconded.

- July 10, 2023, Minutes were approved. Almeida moved to approve, and Jim Wiseman seconded.

Public Comment

None

Subcommittee Report

Subcommittee 1

James Wiseman stated Subcommittee 1 is working on three issues:

- Issue #54250, Increase Electronic Filing of Forms and Returns, this issue has been around since April 2022. Subcommittee 1 is waiting for feedback on two recommendations. IRS response of non-adopt was received and accepted. ID #2344 and #2345. IRS responded with a non-adopt. Subcommittee recommendation is to accept IRS response.
Almeida moved to accept, and Wiseman seconded.
Decision: Full Committee Consensus accept IRS recommendation and close Issue #54250
- Issue #56767, IRS Hours of Operations, Subcommittee 1 transferred this issue to Toll-Free Committee
- Issue #48868, Updating Contact and Banking Information, Subcommittee 1 is working the referral and anticipate having the final draft ready for the full committee meeting in September.

Subcommittee 2

Joanne Thurston shared the following updates for Subcommittee 2:

- Issue #52477, IRS Web Browser, Subcommittee 2 received IRS response. They recommended closings the issue.
Denise Besson moved to close, and Melanie Almeida seconded.
Decision: Full Committee Consensus Close Issue #52477
- Issue #52167, ID.ME, Subcommittee 2 reviewed the issue to see what was happening now and develop a referral. Updates and changes have occurred with ID.ME since then. The subcommittee will decide whether to revisit or close. IRS response with non-adopt.
James Wiseman made the motion to close, and Almeida seconded.
Decision: Full Committee Consensus Close Issue #52167 and work from a new angle
- Issue #66193, Effectively Measuring Outreach, Subcommittee 2 recommendation is to forward to the Joint Committee.
Almeida move to submit the referral to the Joint Committee. Besson seconded.
Decision: Full Committee Consensus Forward Issue #66193 to the Joint Committee for consideration

Screening Committee Report

Besson shared the following updates for the Screening Committee:

- Two meetings were held on last week.
- The Screening Committee reviewed and closed several issues.
- There are a few in the Parking Lot to assign to the committee. Members were advised to look for assignments next week. Holloway added both committees would have new issues.

Besson motioned to accept the Screening Report and Wiseman seconded.

Decision: Full Committee Consensus accept the Screening Committee's report

Outreach Report

Almeida shared the following updates:

- The Tax Forums are in process. Members will be attending in their areas. Almeida will attend in San Diego, CA at the end of the month.
- Positive feedback has been received from the first forums. They indicated around two hundred copies of documents that were available.
- Outreach, Outreach, Outreach are the words of Angela Madison. Members were encouraged to continue doing Outreach.
- A suggestion was made to add Outreach information to www.TAPSpace.org on past Outreach events.

Internal Communications Committee

Besson shared the following ICC updates:

- ICC is working on www.TAPSpace.org, Facebook page where a class for the administrators on social media.
- The SpeakUp Brochures has been approved.
- ICC meeting will be held on next week where they will discuss some of the content on the site and the TAP Member Toolkit
- Hannah Jair last day will be on Friday with TAP. She has accepted a new position. The backup analyst will be Matthew O'Sullivan. He will be the Analysts leading ICC beginning next week.
- CSO staff member attended last month's meeting and spoke on issues with the website. They have improved and it should be working a lot better. Members were encouraged to alert the staff if they are having problems.

Action Items

Holloway shared the following Action items:

- Forward June and July approved minutes to Kevin Brown for posting.
- Close Issues #54250, #52477, and #52167 and update the system.
- Transfer Issue #56767 to TFPL

- Forward Issue #66193 to the Joint Committee with date and ID number
- Accept the Screening Report and close out the issues.
- Encourage members to update their Activity Records. Members having any issues, contact Holloway.
- Wiseman will submit the next Newsletter article by the August 24, 2023
- Share the last report with Wiseman along with some talking points.
- Members assignments were received and will be shared with Almeida by Monday and included in the pre-reads for next month's meeting.

Roundtable

Wiseman welcomed Jeans to the Acting TAP Director's position. Thank you to Holloway for the pre-reads and congratulations to Jair.

Inquiry on what happens when a member is a no show to meetings consistently. Jimerson explained the process in determining whether the member would be considered for removal from the TAP.

Congratulations expressed to Holloway, will be the next Joint Committee Analyst overseeing the Joint Committee along with her current responsibilities to TCC.

Holloway encouraged members to attend the Joint Committee's meeting in support of Besson. Almeida stated she would attend. Besson will share the invite with members.

Jimerson thanked everyone for joining the call. Members who may have questions were encouraged to reach out to Jimerson and Staff.

Close

The meeting was officially closed at 12:47 PM, EST.

**Next Meeting: Thursday, September 14, 2023
12:00 PM EDT, 11:00 AM CDT, 10:00 AM MDT, 9:00 AM PDT**

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