

**Taxpayer Communications Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Thursday, September 14, 2023**

Designated Federal Officer

- Susan Jimerson TAP West Chief

Attendance

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| • Melanie Almeida | Sandpoint, ID | Member |
| • Richard Bell | Corpus Christi, TX | Member |
| • Michelle Brookens | Taylorville, IL | Vice Chair |
| • Denise Besson | Trufant, MI | Chair |
| • Candace Smith | Mustang, OK | Member |
| • James (Jim) Wiseman | Brentwood, TN | Member |

Members Absent

- | | | |
|-----------------------|--------------|--------|
| • Ruth Guyon | Bellevue, NE | Member |
| • Tracey Randall-York | Ontario, CA | Member |
| • Joanne Thurston | Marietta, GA | Member |

Visiting Member

- | | | |
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| • Eugene Lillie | West Deptford, NJ | TAP National Chair |
| • Angela Madison | Los Angeles, CA | TAP National Vice-Chair |

Staff

- | | |
|----------------------|------------------------------|
| • Fred Smith | Acting, TAP Director |
| • Conchata Holloway | TAP Program Analyst |
| • Matthew O'Sullivan | TAP Program Analyst |
| • Rosalind Matherne | TAP Program Analyst |
| • Annie Gold | TAP Administrative Assistant |
| • Tamikio Bohler | W&I Program Analyst |

Quorum

A quorum was met.

Welcome and DFO Report

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

- September 19, 2023, Internal Communications Committee (ICC) beginning at 12:00 PM, EST
- **September 20, 2023, Outreach will have their monthly meeting beginning at 11:00 AM, EST. This committee is lead by the National Vice Chair, Angela Madison**
Action: *Fred Smith will send an email message with cancellation notice and the rescheduled notice. * Direct questions to Smith and Angela Madison
- September 25, 2023, Joint Committee's monthly meeting beginning at 3:00 PM, EST

National Office Update

Fred Smith welcomed everyone attending the call. The following updates were shared:

- September 26, 2023, Focus Group for Appeals issues is scheduled to begin at 2:00 PM, EDT. An email notification has been sent out to members. Members were encouraged to reply to the email once it is received
- Susan Jimerson sent an email message for volunteers to assist with the Annual Report process. Responses are requested by the date indicated on the message
- Next week TAP Staff will be in Dallas for training. Email responses may be delayed. Members were encouraged to continue to reach out if they should have issues that need immediate responses or questions
- Appreciation expressed for members having quorum for today's meeting. There are two remaining Full Committee meetings for the year. Quorum is very important. Members unable to attend were encouraged to let the Analysts and Chair know. This will help if a meeting needs to be rescheduled to ensure quorum
- Retiring members were encouraged to enter Activity hours correctly. This is help determine the type of award and recognition for time served on the TAP

Chair Report

Denise Besson expressed appreciation to members for being on the call. The following updates were shared:

- Issue #66193, Effectively Measuring Outreach was approved at the Joint Committee level on last month and going forward to IRS
- The end of TAP year 2023 is approaching. Members were encouraged to attend the remaining meetings if possible. This will help in getting as much work done by the end of the year, as possible

- Subcommittee 1 and 2 will be combined into one committee due to not having enough attendance between the two for individual committees. There will be a Ad Hoc meeting on September 26, 2023, at 1:00 PM, EST.
- The Ad Hoc By Laws committee meeting is coming up. Melanie Almeida will represent TCC. Members were encouraged to read the By Laws and share with Almeida, any suggestions. A template will be sent to members for suggestions. Almeida and Conchata Holloway will confirm the meeting date
- Members were encouraged to update their Activity Reports. Updating directly after each meeting or Outreach event was encouraged

Minutes Approval

August 10, 2023, Minutes were approved as submitted.
Richard Bell motioned, and Melanie Almeida seconded.

Public Comment

None

Subcommittee Report

Besson and Michelle Brookens shared the following subcommittee updates:

- Issue #48868, Updating Contact and Banking Information, the referral was completed by both subcommittees. Almeida completed the QR process and submitted it to SA and the Attorney Advisor for review. They are still waiting for a response
- Issue #56584, the Bar Code Issue on mailed in Tax Returns the subcommittee voted to close this issue and include it with Issue #51118, Enhancing Online Features. Members were encouraged to make a personal online account.

Brookens motioned and James Wiseman seconded

Decision: Full Committee Consensus Close Issue #56584

- Issue #62230, Educating Newly Arrived Immigrants, members were encouraged to read the information shared by Eugene Lillie. Discussion will be held on September 26, 2023.

Screening Committee Report

Besson shared the following updates for the Screening Committee:

- The Screening Committee reviewed twelve issues. Eight of those issues were closed. Two issues were transferred and two will be worked by TCC

Brookens motioned to approve and Almeida seconded

Decision: Full Committee Consensus Approve the Screening Report as submitted

Outreach Report

Brookens shared the following updates:

- Members were encouraged to go online and keep their activity reports updated
- The total number of hours for Outreach – 931.75 for TCC. TCC came in second to TAC with the total hours. Most of the hours came from the Face-to-Face meetings held in May and from the National Tax Forums
- Total hours for August were 663.5 Outreach Activity
- Members were encouraged to take a picture with the people they are speaking with during Outreach and send copies to Angela Madison with a short blurb for posting. Direct any questions to Madison, the person to go to for Outreach
- The next meeting for Outreach on September 20, 2023, has been cancelled. Notification will be shared when it is rescheduled
- Wiseman requested the total for his Outreach hours reported. Holloway will forward to Wiseman and supply each member with their totals

Internal Communications Committee

Besson shared the following ICC updates:

- The Facebook page has been updated. The volunteers managing it has been working on training and a schedule
- www.TAPSpace.org is being worked to add email addresses with telephone numbers. Members will be able to say who would be able to see their information
- ICC is working on ways the public can have access to TAP meetings with email lists and obtain premeeting documents through www.ImproveIRS.org
- ICC is working through the VITA Site issue with having SpeakUp Brochures available at the sites

Action Items

Holloway shared the following Action items:

- Forward August 10, 2023, approved minutes to Kevin Brown for posting
- Close Issues #56584 and relate it to Issue #51118
- Update SAMS with Screening Report issues that were closed
- Send members cumulative Outreach hours by Tuesday of next week
- Members were invited to the Joint Committee on September 25, 2023, beginning at 3:00 PM, EST. Members were reminded to let Holloway know if interested
- TCC Ad Hoc Subcommittee meeting will be held on September 26, 2023, at 1:00 PM, EST. If members did not get the invite, let Holloway know.

Roundtable

Besson asked for comments, questions, or suggestions:

- Lillie expressed appreciation and thanked Besson and members for all of the work the committee has been doing
- Brookens stated over thirty-five hundred people were in attendance during the Tax Forums in Orlando, Florida. There were a lot of issues. Thank you to IRS for the event
- Almeida inquired on members not participating and if any action was needed from the committee. Jimerson responded management would contact the member not responsive. There is nothing for the committee to do at this point
- Richard Bell expressed his gratitude
- Madison encouraged ending the TAP year with a bang, uplifting and continual support for Outreach. Start planning for first- and second-year members, and end the year with the awareness that TAP does exist
- Tamikio Bohler stated thank you to the committee for helping W&I improve service to Taxpayers. If there is a need for a SME, let her know
- Besson reminded the committee to read over the documents shared by Lillie for the meeting scheduled for September 26, 2023, beginning at 1:00 PM, EST and plan to be at the remaining meetings. The meeting is to work Issues #51118 and #62230

Jimerson thanked everyone for joining the call and hard work. The TAP Staff is working hard in the background to get referrals through the channels to forward to the Joint Committee for consideration. Any research and/or SMEs will be worked to get what is needed. Members who may have questions were encouraged to reach out to Jimerson and Staff.

Close

The meeting was officially closed at 12:38 PM, EST.

**Next Meeting: Thursday, October 12, 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.