

**Taxpayer Communications Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Thursday, October 12, 2023**

**Designated Federal Officer**

- Susan Jimerson                      TAP West Chief

**Attendance**

- Melanie Almeida                      Sandpoint, ID                      Member
- Richard Bell                              Corpus Christi, TX                      Member
- Denise Besson                              Trufant, MI                              Chair
- Candace Smith                              Mustang, OK                              Member
- Joanne Thurston                              Marietta, GA                              Member
- James (Jim) Wiseman                      Brentwood, TN                              Member

**Members Absent**

- Michelle Brookens                      Taylorville, IL                      Vice Chair
- Ruth Guyon                                  Bellevue, NE                              Member
- Tracey Randall-York                      Ontario, CA                              Member

**Visiting Member**

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

**Staff**

- Conchata Holloway                      TAP Program Analyst
- Matthew O'Sullivan                      TAP Program Analyst
- Rosalind Matherne                      TAP Program Analyst
- Annie Gold                                  TAP Administrative Assistant
- Mejbeen Balsara                              W&I

**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:

- The TAP Staff is working on a contingency plan in lieu of a possible government shutdown to schedule a early meeting for the Joint Committee. This is to assure the referrals are reviewed and pushed through
- October 17, 2023, Internal Communications Committee (ICC) beginning at 12:00 PM, EST
- October 18, 2023, Outreach will have their monthly meeting beginning at 11:00 AM, EST. This committee is lead by the National Vice Chair, Angela Madison
- October 20, 2023, Annual Report meeting beginning at 12:00 PM EST
- October 23, 2023, Joint Committee's monthly meeting beginning at 3:00 PM, EST

### **National Office Update**

Cedric Jeans could not be on the call today.

### **Chair Report**

Denise Besson expressed appreciation to members working hard while both subcommittees have been combined into one.

- The committee has three issues on the agenda. One is anticipated to be approved and forwarded to the Joint Committee
- The Screening Committee met earlier in the week. A lot of issues were reviewed and placed in the Parking Lot to be reviewed on next year. There will be a lot to work on for the returning members

### **Minutes Approval**

September 14, 2023, Minutes were approved as submitted.  
James Wiseman motioned, and Richard Bell seconded.

### **Public Comment**

None

### **Subcommittee Report**

James Wiseman stated they have a couple of referrals ready to move forward:

- Issue #48868, Change Banking Information after filing a Return has eight recommendations. A lot of them have to do with making clear instructions and methodology to change the bank account information.

**Wiseman motioned and Melanie Almeida seconded**

**Decision: Full Committee Consensus approved to forward Issue #48868 to the Joint Committee.**

- Issue #51118, Enhancing Online Account Features they are looking at the features for what is available online and comparison to other online accounts. They have some recommendations they are working on. They are close to finalizing with a possible roll over into next year. Striving to have more in the November meeting

- Issue #62230, Educating Newly Arrived Immigrants was left in the Parking Lot. Eugene Lillie shared a document from another part of government which lead to a publication for newly arrived immigrants. They will research what is already available. It will remain in the Parking Lot

### **Screening Report**

Holloway stated the committee needs to vote on the approval of the Screening Report. The issues were mentioned previously with issues in the Parking Lot verses issues the Screening Committee dropped. Besson asked if members had reviewed the issues and if there were questions.

**Richard Bell motioned, and Almeida seconded the approval of the Screening Report**

**Decision: Full Committee Consensus approved the Screening Report**

### **Outreach Report**

Angela Madison shared the following updates:

- Outreach-Outreach-Outreach
- Many of TAP members are tax preparers or are involved in that world. How Outreach looks must be diversified. It is stressed throughout the year how so many Tax Preparer Forums and events are scheduled. There is not enough light shared on the ones outside of that. Taxpayers are the target market around the world not just domestic. Everywhere members go, every organization; fraternal, religious, PTAs, schools, junior colleges, colleges, universities, all Taxpayers around the world. Members are involved with Taxpayers in some areas. Members were encouraged to reach out about TAP in every area they serve
- Madison shared a list of some organizations she volunteers at: the United Nations, Green Peas, Air Quality Board, and others. There are college organizations, fundraising organizations all have Taxpayers. Members were encouraged to get on their calendars for next year. It does not matter how small or how large the organization is. Madison added she was able to secure three of them where there are 800 to 1000 people who participate during the Senior Days. Getting the tables are free and does not cost anything.
- Members were encouraged to think outside the box using the quote “Jack of all trades; Master of none” the remainder of the quote speaks about the “better than being the master of one”. If TAP diversify our thinking and expand our knowledge and scope, we will hit more. Celebrate everything in every aspect.
- A list will be sent to members of ideas and organizations that exist nation wide
- Madison reminded members to turn in their Outreach Activity Reports on time. Whether on a spreadsheet or website make sure you get credit for the work you have done

- Members were asked to share videos of why you are here. Especially the third-year members. No more than one minute per video which is due by November 03, 2023

### **Internal Communications Committee**

Besson shared the following ICC updates:

- ICC worked on the Facebook page
- On October 10, 2023, there was a post about a webinar for the Tax Pro Account, an online account. There was no link to the webinar. Madison will follow up and share the response
- Almeida is working on suggestions for improvements to [www.TAPSpace.org](http://www.TAPSpace.org) Members with suggestions were asked to submit them to Almeida or Matthew O'Sullivan
- ICC is also working on a email list for TAP meetings. This project is on the table
- ICC next meeting is scheduled for October 16, 2023, beginning at 12:00 PM, EST. Members were encouraged to attend the call. Besson will make sure the invite is shared

### **Action Items**

Holloway shared the following Action items:

- Forward September 14, 2023, approved minutes to Kevin Brown for posting
- Forward Issue #48868 to the Joint Committee and post on their agenda
- Close out the issues from the Screening Report. Email to members on the fifty remaining issue to review
- Thank all members for all the work each person has done. All are amazing

### **Roundtable**

Besson asked for comments, questions, or suggestions:

- Almeida asked will there be a TAP meeting on expectations for January 2024. Besson responded training will occur in March of next year
- Wiseman inquired on the timing for TAP recruitment. Jimerson stated the recruitment period starts in early March 2024. Depending on the many steps TAP must go through with the Human Capitol Office, HCO. The announcement will be posted on [www.ImproveIRS.org](http://www.ImproveIRS.org)
- He also asked who to send the recap that was asked of members. Lillie stated members can send them to him
- Wiseman asked if the Annual meeting occurs each year and what timeframe. Jimerson stated the annual meeting held in May of this year was the first meeting where all of TAP membership were able to be together hasn't happened in ten years. Prior to the Pandemic there were regional meetings. More information will come out prior to launching the new TAP year
- Madison mentioned the request going around asking for members to do certain things and addressing things being worked on including the Annual

Report. Holloway stated the first meeting is scheduled for October 20, 2023 for the Ad Hoc Annual Report Committee. Jimerson added the Chair report template has been sent and looking for their first draft by October 13, 2023. Other documents will come for the team to review. They have a standard format that is in place. It is important for the Chairs to get their initial draft completed to help get everything finalized and consistency for one voice of the entire TAP membership

- Lillie expressed thank you to members for allowing him to be the Chair. He has enjoyed attending meetings and watching members develop, first year members develop and contribute to TAP adding to the TAP concept, and getting referrals polished then sent to the Joint Committee and finally over to the IRS for consideration. He has enjoy this opportunity. There is conflict all over. Pray for Peace
- Joanne Thurston asked if copies of the Annual Report could be shared or a place to obtain a copy. Jimerson added the [www.irs.gov](http://www.irs.gov) Forms Suppository has Publication 4444. Kevin Brown will mail twelve copies to Thurston
- Mejbeen inquired on getting a copy of the issue being forwarded. Holloway will share a copy with her
- Besson thanked everyone for being on the call. Great job done

Jimerson thanked everyone for being on the call and for all of the hard work.

**Close**

The meeting was officially closed at 12:58 PM, EST.

**Next Meeting: Thursday, November 09, 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.**