

**Taxpayer Communications Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Thursday, November 09, 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
- Joanne Thurston                      Marietta, GA                      Member
- James (Jim) Wiseman                      Brentwood, TN                      Member

**Members Absent**

- Richard Bell                      Corpus Christi, TX                      Member
- Ruth Guyon                      Bellevue, NE                      Member
- Candace Smith                      Mustang, OK                      Member

**Visiting Member**

- Angela Madison                      Los Angeles, CA                      National Vice-Chair

**Staff**

- Shawn Collins                      TAP Director
- 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:

- Thank you to the following members on their graduation at the end of the month: Denise Besson, Joanne Thurston, and Tracey Randall-York.

Congratulations and appreciation for servicing three years of great sacrifices

- November 15, 2023, Outreach will have their last meeting beginning at 11:00 AM, EST
- November 16, 2023, Joint Committee will have an early meeting beginning at 3:00 PM, Est. Two meetings are scheduled for this month in lieu of the uncertainty of a shutdown. There are a lot of referrals coming in and this will help to get them all through
- November 21, 2023, Internal Communications meeting beginning at 12:00 PM, EST
- November 27, 2023, Joint Committee's second meeting beginning at 3:00 PM, EST
- November 28, 2023, TAP Graduation Celebration beginning at 1:00 PM, EST for TAP's third year members

### **National Office Update**

Shawn Collins welcomed everyone to the call. Appreciation and thank you expressed to each member with emphasis on the third-year members for all of their efforts and hard work.

- Returning second- and third-year members were encouraged to consider being a leader for the Chair or Vice Chair position for their project committees
- Members should mark their calendars on November 28, 2023, beginning at 1:00 PM, EST. TAP Graduation Ceremony for all third-year members will be a great event. Collins is looking forward to being a part of the celebration
- The end of the year surveys will be shared with members for feedback. The surveys will go out during the last week in November and in January. Member were encouraged to take the survey. It helps in improving areas needing improvements and build up areas to make TAP a better place.
- Although TAP will be on a temporary band Outreach continues. Members were encouraged to continue spreading the word about TAP
- Returning members were encouraged to continue to report their activity hours in [www.TAPSpace.org](http://www.TAPSpace.org)
- TAP Chair elections will take place on tonight, November 09, 2023. All votes are confidential. The results will be announced on November 13, 2023. Members were encouraged to vote using their opinion for the best person for the job
- The Annual Report is being worked on. Members with thoughts or additions they would like to share were encouraged to reach out to the Chair who will be the best person to get the information added
- Members were thanked for the year and shared anticipation for the next year

### **Chair Report**

Denise Besson expressed thank you and appreciation to members

- TCC has another issue that has been approved by the Joint Committee and has been forwarded to the IRS for consideration
- Members were encouraged to enter their reports early. A couple of members: Tracey Randall York and Richard Bell were concerned with their total number of hours. With the FTF hours there is not enough showing. They were advised to go back and make sure all hours were entered
- Members with Outreach pictures were encouraged to submit them to Conchata Holloway who will share with the correct person

### **Minutes Approval**

October 12, 2023, Minutes were approved as submitted.

Melanie Almeida motioned, and Joanne Thurston seconded.

### **Public Comment**

Philip Hwang shared suggestions to assist Taxpayers when calling about Notices they have received and looking for information. Hwang's questions were not relative to TCC and was advised TFPL Analyst, Rosalind Matherne would better answer questions. He was invited to join TFPL's monthly meeting that would occur later today. Jimerson assured Hwang any suggestions or comments would be received and routed to the appropriate TAP committee. Jimerson shared the IRS has available to Taxpayers the Online Accounts feature, the Chat Bot feature to communicate with Taxpayers without having to phone in and speak with a live assistor. TFPL has a meeting scheduled on this afternoon. The call-in information will be shared with Hwang to attend and ask questions pertaining to his comments, and suggestions.

### **Subcommittee Report**

James Wiseman shared the following Subcommittee 1 updates:

- Issue #48868, Update Contact and Banking Information after filing a Return was approved during the full committee's meeting in October. They received information from IRS with metrics on the number of times it had happened and added it in their write up. The Joint Committee approved, and it was sent to IRS for review
- Joanne Thurston shared information on Issue #51118, Enhancing Online Account Features. Emails can be sent to IRS and will help the Online Account features. The subcommittee is waiting for information on dates and items being placed on the Online account. Holloway confirmed there has not been a response received. This issue will be worked during next year

### **Screening Report**

Melanie Almeida shared the following:

- There were several requests that came through SAMs. The majority were closed. A few were related or similar to other issues and placed in the Parking Lot for next year.
- One issue related to EFTPS has communication challenges with preparers processing payments for multiple clients. It is difficult to track payments to the correct client. The communication to the client is not clear

**Joanne Thurston motioned, and Wiseman seconded the approval of the Screening Report**

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

### **Outreach Report**

Michelle Brookens shared the following updates:

- Total Activity hours 1,155
- Members were encouraged to submit their full hours and make sure to complete adding hours from door to door/time departing to returning
- Congratulations extended to Melanie Almeida championed with 271.25 hours
- Efforts shows in the work done by Outreach activities

### **Internal Communications Committee**

Almeida shared the following ICC updates:

- The SpeakUp Brochure have been submitted to the Joint Committee to add to the VITA site lists of documents they are able to order
- Discussion on the list serve options for having methods on how to gain access to participate during TAP meetings. Meetings are posted on the Federal Register. This is still being worked
- The request to update TAP signage has been referred to the Outreach committee to review
- Members were encouraged to share any information they may have to be posted on the TAP Facebook page should share it with Madison and Rodriguez to get on their schedule and post for visibility to the public. Madison added the information should be sent to Joseph Parampathu and Daniel Leatham with a copy to Madison
- Third year members were asked to provide their message for the public. A video is preferred

### **Action Items**

Holloway shared the following Action items:

- Members were reminded to send pictures for the Annual Report. Pictures for Outreach need to have good quality. An email message was provided to members explaining what is required. Besson was asked to share her

- picture by herself. This information should be sent to Rosalind Matherne by close of business on tomorrow and a copy to Holloway and Jimerson
- Members were reminded a copy of their consent form needs to be sent to Holloway if they have not already provided a copy
  - Forward October 12, 2023, approved minutes to Kevin Brown for posting
  - Close out the issues from the Screening Report
  - Thank you and appreciation was expressed to members for the work the committee has performed, and the time each member has put in . Thank you for all the relationships formed. The third-year members were recognized for their hard work and dedication

### **Roundtable**

Besson expressed thank you and appreciation to the committee and Staff. She asked for comments, questions, or suggestions:

- Wiseman stated he will be presenting a power point presentation at the Tennessee Society of CPA. He will be recruiting volunteers who may want to apply. He asked if it was possible for them to apply. Holloway added the recruitment period has not been opened yet. Jimerson stated the best way to is to have interested individuals sign up for [www.ImproveIRS.org](http://www.ImproveIRS.org) where a roster is kept with updated recruitment information and current information on what TAP is doing. Meeting minutes, the Annual Report and when meetings will be held are housed on [www.ImproveIRS.org](http://www.ImproveIRS.org) Recommendations can be submitted on [www.ImproveIRS.org](http://www.ImproveIRS.org) as well
- Tracey Randall-York expressed thank you to Holloway and a future visit to say hello
- Information will be shared with members by Holloway on adding information to the Facebook page

Jimerson expressed appreciation to members as it was a bittersweet moment with the third-year members retiring from TAP. It has been an enjoyable experience working with members. Members were informed TAP Staff will be available for questions and or concerns that may come up. Member should reach out if they need assistance. The graduation ceremony will be an exciting event and encouraged member attendance.

The call-in information was share in the Chat on Teams for Philip Hwang for the TFPL Committee meeting, if he would like to listen in.

Shawn Collins expressed appreciation and thanked you to members. To the returning members Collins is looking forward to working with each of you.

**Close**

The meeting was officially closed at 12:44 PM, EST.

**Next Meeting: 2024**

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