

**Taxpayer Communications Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Thursday, April 11, 2024**

**Designated Federal Officer**

- Susan Jimerson                      TAP West Chief

**Attendance**

- Melanie Almeida                      Sandpoint, ID                      Vice Chair
- Michelle Brookens                      Taylorville, IL                      Member
- Daniel Halleman                      Thornton, CO                      Member
- Angela Madison                      Los Angeles, CA                      Member
- Candace Smith                      Mustang, OK                      Member
- James (Jim) Wiseman                      Brentwood, TN                      Chair

**Members Absent**

- Howard Choder                      Seattle, WA                      Member
- Philip Hwang                      Placentia, CA                      Member
- LaRee Lowman                      Homewood, IL                      Member
- Walter Webster

**Staff**

- Shawn Collins                      Acting TAP Director
- Jose Cintron Santiago                      TAP Program Analyst
- Kelvin Johnson                      TAP Program Analyst
- Matthew O'Sullivan                      TAP Program Analyst
- Rosalind Matherne                      TAP Program Analyst
- Annie Gold                      TAP Administrative Assistant
- Conchata Holloway                      TAP Lead Program Analyst

**Quorum**

A quorum was met.

**Welcome and DFO Report**

Susan Jimerson opened the meeting and welcomed everyone to the call. An overview of the agenda was provided along with a few housekeeping procedures. The following DFO Report was shared:

- April 16, 2024, the Internal Communications Committee (ICC) will have their first monthly meeting beginning at 4:00PM, EST.

- April 18, 2024, the Outreach Committee will have their monthly meeting beginning at 2:00PM, EST. The National Vice Chair leads the meeting and the Vice Chairs from all the Project Committees are in attendance. They discuss Outreach activities and different things effecting Outreach
- April 22, 2024, the Joint Committee will have their first monthly meeting scheduled to begin at 3:00PM, EST. The National Chair and National Vice Chair along with the Chairs for the Project Committees and the Chair of the ICC discuss and review the referrals to determine what is ready to go before IRS for consideration. They work on other things associated with IRS. Members were encouraged to join in the call to get information on what goes on during their meeting.
- Annie Gold has contacted or will be reaching out to members to obtain information and secure hotel and flight reservations for the FTF meeting.
- Members are expected to attend their committee meetings and the all day training.

### **National Office Update**

Shawn Collins welcomed and thanked everyone for being on the call. The following National Office updates were shared:

- The Face-to-Face meetings have been scheduled and planned. The locations are Jacksonville, FL; Oklahoma City, OK; and San Antonio, TX
- Committee Analysts contacts have been made regarding making travel arrangements. If members have not been contacted, they will be soon.
- Members were encouraged to file their 2023 Tax Returns. Currently there are five days remaining for the filing season. Members were encouraged to file timely and to keep in mind if an extension is requested it is an extension of time to file but not an extension of time to pay.
- TAC offices will begin Saturday openings. Members were encouraged to check their locations for Problem Solving days by checking on the website or with the committee Analyst. The Analysts will be able to provide the information. This will be a good opportunity to conduct Outreach.
- Members were encouraged to subscribe to the NTA, Erin Collins' Blog for all the available information she has.
- TAP Recruitment period ended on March 29, 2024. A total of one hundred-forty-three (143) applicants were received. Information is being processed to begin the interview process.
- There was a small issue with the database for the Activity Reports. Members who may have had or having a problem entering or pulling up their information were advised to contact the committee Analyst to make sure any discrepancies are corrected to account for all Activity hours.
- Members were encouraged to reach out to Collins with questions and or concerns.

### Chair Report

James Wiseman provided the following for the Chair Report:

- TCC is off to a great start.
- Both Subcommittee 1 and Subcommittee 2 have Chairs elected
- Other committees: Screening and Outreach are all set.
- Members were advised to update their information with their bio and pictures on [www.TAPSpace.org](http://www.TAPSpace.org) and to be sure to log their time.
- Wiseman is looking forward to seeing everyone in Oklahoma City for the FTF meetings.

### Minutes Approval

TCC March 13, 2024, Minutes were approved with edits.

Michelle Brookens motioned, and Wiseman seconded.

### Public Comments

N/A

### Project Topics

An issued was discussed that involved Taxpayers who requested their transcripts online. It was discussed during Subcommittee 2 meeting. The Taxpayer stated when going into the VITA sites the unmasked data is needed. Unmasked transcripts are able to be gotten. Members were asked if they wanted to keep this issue related to Issue #72107, Online Services from IRS. This issue will be closed and moved to Subcommittee 2.

### Subcommittee Report

Subcommittee 1

Daniel Halleman stated Subcommittee 1 looked at four project proposals:

- Issue #51118, IRS Online Features was agreed to combine this issue with Issue #72106, Dealing with Acronymous Communications and Evaluating Essentialized Communication Experience
- Issue #65911, This issue will remain on hold for determination. Jose Cintron added it was decided to close this issue.
- Issue #67747, This issue determined to be out of the scope of TAP. Melanie Almeida added it was also decided to close this issue.

**Almeida made the motion to close Issues #65911; Issue #67747; and combine Issue #51118 and Issue #72106. Brookens seconded.**

**Decision: Full Committee consensus to close both issues and combine the two**

Subcommittee 2

Wiseman shared the following for Subcommittee 2:

- Subcommittee 2 discussed four issues. They decided to close one and keep three

- Issue #62230, Tax Education for Newly Arrived Immigrants. Subcommittee 2 decided to keep this issue and get more summarized information.
- Issue #67745, Subcommittee 2 decided to close this issue.
- Issue #68081, Alternate Method to Submit Form 911. Subcommittee 2 decided to do additional research and relate Issue #68081 to Issue #55988 or keep it as a separate issue.
- Issue #72107, Taxpayer Requested Data. Subcommittee 2 requested a SME to clarify the issue and more information on what Online Services want to accomplish.

**Wiseman motion to keep three and close Issue #'67745. Brookens seconded.**

**Decision: Full Committee Consensus to keep three and close Issue #67745**

### **Screening Committee**

Brookens stated the Screening Committee met and screened eight issues:

Four issues will be kept and four will be closed:

- Issue # 1 Amended Returns status will be kept and researched further.
- Issue # 2 will be consolidated with another issue.
- Issue #64759, Providing Source for Technical Help for the IRS website will be kept and clarify what kind of technical help is need and clarify with the SME.
- The next issue will be combined and closed. It's with the Technical Assistance
- Issue #64840, High Volume 941s and steps to submit electronically will be kept and additional research will be done.
- Issue #65106, Sale Tax Calculator will be closed.
- Issue # 8 will be consolidated with the technical issues.
- Issue #7 or 9 has not been looked at and will be reviewed at the next meeting.
- Issue # 10 will be consolidated with the technical issues.

**Almeida move to accept the Screen Committee Report. Daniel seconded.**

**Decision: Full Committee Consensus accept the Screening Report as submitted**

### **Outreach**

Almeida shared the following:

- Outreach Committee will have their meeting on April 18, 2024. Their focus is to continue to encourage all TAP members to conduct Outreach and received feedback on events planned. ICC postings to Facebook if interested, should reach out to ICC.

- Almeida shared information where she referred a Taxpayer to the LTA to assist in an issue the Taxpayer was having. Members were encouraged to be involved and other events they have been involved in to share with the committee.

### **Internal Communications Committee**

Angela Madison stated the ICC has not had their meeting yet. O'Sullivan shared the following:

- ICC meeting is scheduled for April 16, 2024, beginning at 4:00PM, EST.
- There will be a ICC Chair and Vice Chair will be elected during the meeting
- Each committee will be asked to write an article for the TAP Newsletter. It is due to the O'Sullivan by the twenty-fifth of the month and due to the publisher by the fifth of the following month.
- Volunteers are needed to submit the article for the Newsletter. Cintron will send members a copy of the Newsletter.
- Brookens suggested to schedule members who will submit the article. She volunteered to submit the article for May.
- Madison volunteered for April.
- Almeida volunteered for the June Newsletter article.
- Candace Smith volunteered for August.
- Halleman volunteered for September.
- Wiseman volunteered for October.
- Almeida volunteered for November.

### **Action Items**

Cintron shared the following Action items:

- Forward March 13, 2024, approved minutes to Kevin Brown for posting and post onto [www.TAPSpace.org](http://www.TAPSpace.org)
- Update the Full Committee Consensus on Issues from Subcommittees 1 and 2
- Consolidate the issues from Subcommittee 1 and 2.
- Close issues as agreed from Subcommittee 1, 2 and the Screening Committee

### **Roundtable**

- Almeida asked for clarification on the Subcommittee 1 meeting during the FTF meeting. Jimerson initiated a discussion to decide. It was agreed to have the subcommittee meetings during the FTF meeting in May.
- Smith stated there is an Outreach meeting on April 18, 2024, at 2:00PM, EST. There will be a leadership meeting directly following that meeting.

- Wiseman thanked members for their service and making quorum. He is looking forward to seeing everyone at the FTF.
- Jimerson thanked everyone for being on the call.

**Close**

The meeting was officially closed at 1:57PM, EST.

**Next Meeting: FTF Meeting May 06 -10, 2024 in OKC**

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