

**Taxpayer Communications Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Wednesday, May 7, 2024**

**Designated Federal Officer**

- Susan Jimerson                      TAP West Chief

**Attendance**

- |                       |                 |            |
|-----------------------|-----------------|------------|
| • James (Jim) Wiseman | Brentwood, TN   | Chair      |
| • Melanie Almeida     | Sandpoint, ID   | Vice Chair |
| • Michelle Brookens   | Taylorville, IL | Member     |
| • Howard Choder       | Seattle, WA     | Member     |
| • Daniel Halleman     | Thornton, CO    | Member     |
| • Philip Hwang        | Placentia, CA   | Member     |
| • LaRee Lowman        | Homewood, IL    | Member     |
| • Angela Madison      | Los Angeles, CA | Member     |
| • Candace Smith       | Mustang, OK     | Member     |

**Members Absent**

- |                  |                |        |
|------------------|----------------|--------|
| • Walter Webster | Las Cruces, NM | Member |
|------------------|----------------|--------|

**Staff**

- |                         |                              |
|-------------------------|------------------------------|
| • Jose Cintron Santiago | TAP Program Analyst          |
| • Kelvin Johnson        | TAP Program Analyst          |
| • Matthew O’Sullivan    | TAP Program Analyst          |
| • Annie Gold            | TAP Administrative Assistant |

**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:

- May 16, 2024, the Internal Communications Committee (ICC) will have their monthly meeting beginning at 3:00 PM, EST.
- May 16, 2024, the Outreach Committee will have their monthly meeting beginning at 2:00 PM, EST. The National Vice Chair leads the meeting, and the Vice Chairs from all the Project Committees are in attendance.

- May 23, 2024, the Joint Committee will have their monthly meeting scheduled to begin at 3:00 PM, 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.

### **Chair Report**

James Wiseman provided the following for the Chair Report:

- TCC face to face meeting has been very productive so far. We are making progress on the assigned issues.
- Both Subcommittee 1 and Subcommittee 2 started working on assigned projects.

### **Minutes Approval**

TCC April 11, 2024, Minutes were approved with edits.

### **Public Comments**

No comments

### **Full Committee updates:**

The committee voted on the following issues:

- Issue 48868 response received from IRS, partially accepted will review.
- Issue 63082 will associate with 72106. Move to close.
- Issue 64840 this will be worked my sub-1.
- Issue 66330 associate with 72106 to close.
- 68081 will be worked by sub-2.
- 68633 will be worked by sub-1.
- 68655 will be worked by sub-2.
- 68957 to close.
- 37182 to close.

**Decision: Full Committee Consensus to close issues 63082, 66330, 68957 and 37182**

### **Subcommittee Report**

Subcommittee 1

Halleman provided the following update:

- 72106 prior issue 51108 already has a list that dovetailed into 72106, will be associated. 51108 will be closed.

**Decision: Full Committee consensus to close issue 51108 and associate with issue 72106.**

## Subcommittee 2

Choder shared the following for Subcommittee 2:

- 68081 Relating for Form 911. Working on a referral to IRS.
- 68655 Opt out of IP PIN. Referral drafted.

## Screening Committee

- Brookens stated the Screening Committee scheduled a meeting for May 15, 2024.

## Outreach

Almeida shared the following:

- Outreach info in the TAP Member resources page on TAPSpace.
- Make sure time is being recorded by members.

## Internal Communications Committee

Madison shared the following:

- Working on Speak Up Brochure.
- Next Meeting on the 16<sup>th</sup> she will not attend. Halleman will be in charge.
- Discussed the due date of the newsletter articles.
- If you want to do Facebook admin, inform Matt and he will pass the information to Rebecca Lammers. We are open to any Facebook ideas.

## Action Items

Cintron shared the following Action items:

- Minutes accepted and will be posted to [www.TAPSpace.org](http://www.TAPSpace.org).
- Will review responses from IRS.
- Will update SAMS with the closed and associated issues.
- Subcommittees will work on their assigned issues.

## Roundtable

- Madison mentioned Outreach and getting TAP tablecloths.
- Brookens mentioned we are still looking for volunteers for Tax Forums.

## Close

Susan Jimerson closed the public portion at 3:44 PM EST.

**Next Meeting: June 13, 2024**

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