

**Taxpayer Communications Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Thursday, June 13, 2024**

**Designated Federal Officer**

- Susan Jimerson                      TAP West Chief

**Attendance**

- |                     |                 |            |
|---------------------|-----------------|------------|
| • Melanie Almeida   | Sandpoint, ID   | Vice Chair |
| • Michelle Brookens | Taylorville, IL | Member     |
| • Philip Hwang      | Placentia, CA   | Member     |
| • LaRee Lowman      | Homewood, IL    | Member     |
| • Candace Smith     | Mustang, OK     | Member     |
| • Walter Webster    | Las Cruces, NM  | Member     |

**Members Absent**

- |                       |                 |        |
|-----------------------|-----------------|--------|
| • Howard Choder       | Seattle, WA     | Member |
| • Daniel Halleman     | Thornton, CO    | Member |
| • Angela Madison      | Los Angeles, CA | Member |
| • James (Jim) Wiseman | Brentwood, TN   | Chair  |

**Staff**

- |                         |                              |
|-------------------------|------------------------------|
| • Shawn Collins         | Acting TAP Director          |
| • Jose Cintron Santiago | TAP Program Analyst          |
| • Kelvin Johnson        | TAP Program Analyst          |
| • Matthew O'Sullivan    | 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. The following DFO Report was shared:

- Jimerson has completed all interviews on her list. There are a lot of good candidates interested. The Staff is working to get the package rolling to get the applicants approved

- The Outreach Committee will have their monthly meeting on June 20, 2024, beginning at 2:00PM, EST and is lead by Michelle Brookens
- June 20, 2024, the Internal Communications Committee (ICC) will have their first monthly meeting beginning at 3:00PM, EST
- June 27, 2024, the Joint Committee will have their first monthly meeting scheduled to begin at 3:00PM, EST. The referrals are forwarded to the Joint Committee for approval prior to sending to IRS
- Philip Hwang asked the timeframe for submitting issues ahead of the Joint Committee's meeting. Jimerson shared once the referrals are ready for review by the Joint Committee, five business day is preferred

### **National Office Update**

Shawn Collins welcomed and thanked everyone for taking time out of their schedules to a part of the TAP and for being on the call. The following National Office updates were shared:

- Members were encouraged to enter all time spent on TAP onto their Activity Reports. Tracking time could mean talking with someone about TAP, to a meeting or Outreach. Any questions members were advised to reach out to their Analyst for assistance
- TAX Forums begin on July 08, 2024, is the first one in Chicago, IL. There are a few members who will be participating at the forums. Members with issues were encouraged to contact their Analyst
- The Staff is making preparations for the Joint Committee's FTF planning session beginning in August 26, 2024 through August 29, 2024, in Jacksonville, FL
- Members who have not received their travel reimbursements from the FTF meetings were encouraged to reach out to Annie Gold, or Kevin Brown. Reimbursements are anticipated to be deposited as quickly as possible
- Members who have not received their business cards were advised to reach out to their Analyst to check where we are in the process
- July 10, 2024, at 1:00PM, EST begins TAP Quarterly Virtual meeting. Members should have received the invites but were advised the invites will be going out shortly. The meeting will be held virtually for all members

### **Chair Report**

Melanie Almeida provided the following for the Chair Report:

- Suggestions were offered concerning the May minutes to change the Issue 68081 to Form 911 not 941. This will be brought back to the full committee
- Included in the Pre-reads for this meeting were duplicate copies of the response for Issue #48868. The documents were identical but named differently

- A review of the Pre-reads was provided. Jose Santiago has been reaching out to IRS for their response on the first three items in time for the next meeting

### **Minutes Approval**

TCC May 07, 2024, Minutes were approved with corrections. Michelle Brookens motioned, and Candace Smith seconded.

### **Public Comments**

N/A

### **Subcommittee Report**

Subcommittee 1

Philip Hwang stated Subcommittee 1:

- Issue #64840 a Taxpayer was having issues making changes post submission on F941, additional information was requested from the Taxpayer to make the most informed recommendation. It is similar to Issue #72106 dealing with the Online Account Features. The issue being drafted and is in the early stages. Santiago added, Conchata Holloway has reach out to SA for a response on Issue #64840 and awaiting their response
- Issues #72106, Online Account Features a meeting has been scheduled for next week with the SME before finalizing the recommendation
- The EIN Application is with Quality Review and has been finalize. It is now ready for the Joint Committee. Santiago informed the committee, there will be a meeting on July 02, 2024, with the SME

Subcommittee 2

Santiago shared the following for Subcommittee 2:

- Issue #68081, Alternate Method to Submit Form 911. This issue has been reviewed by QR and has been forwarded to SA and the Attorney Advisor. Subcommittee 2 anticipates a response by June 21, 2024, and ready for the full committee vote in July
- Issue #68655, Taxpayer has the right to option out of the program. There was an update on July 16, 2024, Subcommittee 2 has certain issues and decided to place this issue in the Parking Lot for now
- Issue #72107, Online Services will have and SME discussion on July 06, 2024. Hwang asked if the turnaround time will be quicker by going through TAS or IRS. Jimerson shared the issue is owned by TAS and will go through TAS instead of IRS

### **Outreach**

Almeida shared the following:

- Members were reminded to record all activities on their Activity Reports

- Michelle Brookens provided an update email showing four percent of activity being recorded associated with Outreach. The year is still early and the Tax Forums will add to those hours for the year. Members encouraged to record their activity hours to take credit for the time and taking responsibility and ownership sharing with people who TAP is
- Members were encouraged to reach out to Kevin Brown for any Outreach supplies needed such as brochures, tablecloths, and materials
- Any scheduled events to be advertised can be sent to the Internal Communications Committee to be advertised

### **Screening Committee**

Michelle Brookens shared the following for the Screening Report:

- A total of thirty-one issues were reviewed. Two were transferred to TAC, two were keep with TCC, and the rest of the issues were determined to be closed.
- Issue #66371, IRS to go Ap, Brookens asked if combining this issue with the Online Accounts issue wouldn't be better keep this as a separate item to work rather than combining. Committee held a discussion
- Almeida asked a question on IRS accountability was asked for clarification on the scope for TAP to work. Matthew O'Sullivan shared the following list of who keeps IRS under a governing authority: Congress, Treasury Inspector General, The Government Accounting Offices and several others. Jimerson added the scope of TAP work is to improve customer service for Taxpayers that aligns with the six project committees

**Almeida motion to accept the Screening Report as submitted. Hwang seconded**

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

### **Internal Communications Committee**

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

- ICC meeting next scheduled meeting will be held on next week Thursday, June 20, 2024, beginning at 3:00PM, EST
- Members were encouraged to join in
- The Newsletter was published on last week. Some articles were long. It was expanded to cover all of the information
- Members wanting to submit content to be included in the Newsletter were advised to send the information to Santiago who will share with O'Sullivan to take care of
- O'Sullivan is looking forward to receiving the Newsletter articles from members by the twenty-fifth of each month
- Almeida volunteered for the June Newsletter article and Smith will do July

### **Action Items**

Santiago shared the following Action items:

- Forward May 07, 2024, approved minutes to Kevin Brown for posting and post onto [www.TAPSpace.org](http://www.TAPSpace.org)
- Update the system with Issue #48868 waiting for response on recommendation
- Issue #68633 forward to SA and AA for review
- Issue #72016 is pending response, meeting on July 02, 2024, with SME
- Issue #64840 waiting for response from SA
- Issue # 68081 waiting for response from SA, meeting on June 21, 2024
- Issue #68655 place in Parking Lot
- Issue #72107 waiting for response, meeting with SME by July 02, 2024
- Update Screening Committee approved report with corrections

### **Roundtable**

Jimerson expressed appreciation for the being at the Face-to-Face meetings on last month. There was a lot accomplished. Jose Santiago will provide members with oversight of information on the oversight of IRS for the level of TAP and Taxpayers having input.

### **Close**

The meeting was officially closed at 1:48PM, EST.

**Next Meeting: Thursday, July 11, 2024  
1:00PM EDT, 2:00PM CDT, 10:00AM MDT, 09:00AM PDT**

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