

**Taxpayer Communications Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Thursday, August 8, 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 |
| • Angela Madison | Los Angeles, CA | Member |
| • Walter Webster | Las Cruces, NM | Member |

Members Absent

- | | | |
|-----------------|--------------|--------|
| • LaRee Lowman | Homewood, IL | Member |
| • Candace Smith | Mustang, OK | Member |

Staff

- | | |
|-------------------------|--|
| • 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 |
| • Mejbeen Balsara | Taxpayer Services |
| • Cindy Jones | Taxpayer Services |
| • Benjamin Scheuring | TAS Systemic Advocacy Attorney Advisor |
| • John Manhire | TAS Systemic Advocacy Attorney Advisor |

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:

- TAP Year 2024 will be closing out on November 30, 2024. Members were encouraged to work on completing referrals and sent over to the Joint Committee
- The Recruitment interviews for TAP year 2025 have all been completed. It will go through the Director and moved forward through the process
- The National Tax Forums in Baltimore, MD will be coming up on August 13 - 15, 2024. Dallas, TX is scheduled for August 20 - 22, 2024 and San Diego, CA for September 10- 12, 2024. The forums will be ending on September 12, 2024. The TAP supplies are available and include promotional materials such as TAP Banners, tablecloths, and popup displays
- The Outreach Committee next scheduled meeting will be held on August 15, 2024. Beginning at 2:00PM EDT.
- ICC will have their meeting on August 16, 2024, beginning at 3:00PM, EDT.
- The Joint Committee next meeting will be held on August 22, 2024, beginning at 3:00PM, EDT.
- The Joint Committee Planning Session is scheduled to be held on August 27- 28, 2024. Member with thoughts or concern were encouraged to reach out to their Chair to share with the Joint Committee

Chair Report

James Wiseman provided the following for the Chair Report:

- Subcommittee 2 met on Monday and Subcommittee 1 met on Wednesday
- The Joint Committee approved a couple of Referrals and will go forth as recommendation from TCC. One was related to the EIN Application and the other was the submission of F911
- Members were encouraged to continue to enter their time onto the Activity reports
- TCC members were informed their committee is leading in Outreach reporting

Minutes Approval

TCC July 11, 2024, Minutes were approved as submitted.

Melanie Almeida motioned, and Daniel Halleman seconded.

Public Comments

N/A

IRS Responses

Wiseman shared the following updates:

- Issue 48868 actions have been completed

2606 update to letters CP53A and CP53C informing the Taxpayers deposits were not able to be direct deposited into their account. The committee agreed to accept the response from IRS. Notices are sent out using first class mailing.

Wiseman motioned to accept the partial recommendation. Halleman seconded.

Decision: Full Committee Consensus accepted IRS partial recommendation

- Issue 68633, EIN Application Process and Experience and Issue 68081, Adding an Email Option to Submit F911 was completed and approved by the Joint Committee.

Subcommittee Report

Subcommittee 1

Halleman shared the following updates:

- Subcommittee 1 had a productive meeting on yesterday
- Issue 64840 deals with having a high volume of filings of 941s. Subcommittee 1 discussions on if the issue deals with Tax pro function, online services or both professionals and individuals.
- Issues #72106, Online Account Features is an ongoing issue. Subcommittee 1 are rewriting sections to submit to counsel for their input and on to the Joint Committee by next month. Good progress is being made.

Subcommittee 2

Howard Choder shared the following for Subcommittee 2:

Issue #72107, Online Services and Transcripts. Subcommittee 2 are having discussions on the recommendation. They are gathering information on questions asked by the SME to assist in their discussions.

Outreach

Almeida shared the following:

- Almeida was unable to attend the last Outreach meeting
- The Tax Forums are moving forward and TAP members are attending each forum
- Members were encouraged to enter their time onto their Activity Reports
- Members were reminded there are materials available if posting events, always share business cards while out and about, and take advantage of the interactions and scheduled meetings
- Brookens encouraged members to enter hours as much as possible

Screening Committee

Brookens shared the following for the Screening Report:

A total of 53 issues reviewed, 44 were recommended to close, three transferred, six will be kept in the Parking Lot,

Wiseman motion to accept the Screening Report as submitted. Halleman seconded.

Decision: Full Committee Consensus accept the Screening Report as submitted

Internal Communications Committee

Angela Madison expressed thank you to Jose Cintron and Matthew O'Sullivan for their assistance.

- Members were reminded if responsible for the submission of the Newsletter article within their committee, the submission is due to Matthew O'Sullivan by the twenty-fifth of the month
- The meeting for the Facebook page team has not been scheduled yet. All volunteers have been assigned. Members were encouraged if they have an interest in being a part of the team, there is still room and time to join
- O'Sullivan added he will schedule the meeting. Madison will share the date and time along with the list of volunteers
- Appreciation was expressed to O'Sullivan for his support

Action Items

Cintron shared the following Action items:

- Forward July 11, 2024, approved minutes to Kevin Brown for posting and post onto www.TAPSpace.org
- Update the system with Issue #48868 accepted recommendations
- Follow up on the recommendations for CP53A and CP53C
- Issue 68633 and Issue 68081 forwarded to the Joint Committee
- Issue 64840 Subcommittee continuing to draft the referral
- Issue 72016 rewrite and send the referral form
- Issue 72107 draft the recommendation
- Update the system showing the Screening Report was accepted

Roundtable

Members expressed their appreciations in seeing the referrals being pushed through.

- Jimerson expressed thank you to W&I and members for joining the call and doing a great job on today's meeting
- Cindy Jones expressed thank you to the committee for allowing her to sit in on the call. She enjoyed being a part of and see what goes on. Appreciation for the work the TAP does and the collaboration between TAP and Taxpayer Services.

- Cintron alerted the committee a new project has been received. He will share the information with the members and a response will be anticipated by next week Wednesday as to whether they will accept to volunteer
- Walter Webster asked if Taxpayers are notified of results of the issues submitted on the Screening Report. Madison stated it varies depending on whether it is in the control of the committee. When able respond they will respond. Webster will volunteer to join the Screening Committee
- Almeida ask if it was possible to reach out to taxpayers through social media if there is a public facing and encourage the taxpayers to reach out to Taxpayer Advocate Service. Jimerson cautioned for future increased inquires. Jimerson added appreciation to members for their work being done.

Close

The meeting was officially closed at 1:55PM, EDT.

**Next Meeting: Thursday, September 12, 2024
1:00PM EDT, 2:00PM CDT, 10:00AM MDT, 09:00AM PDT**

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