

**Taxpayer Communications Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Thursday, September 12, 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 |
| • Matthew O'Sullivan | TAP Program Analyst |
| • Annie Gold | TAP Administrative Assistant |
| • Mejbeen Balsara | Taxpayer Services |

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:

- A solicitation letter was sent to the first- and second-year members to be a part of the 2024 TAP Annual Report Team. Responses are due by September 20, 2024. Members were encouraged to reach out to Jimerson and or Conchata Holloway if interested
- A calendar invite was sent to members for the Stakeholders Partnership Education and Communications (SPEC) Outreach event beginning on September 26, 2024, at 2:00PM, EST. This event will be focused on preventing scams with a targeted audience involving the elderly, English

- language proficiency population. Members were encouraged to attend. The Staff will assist members attending with topics to speak about
- Today, September 12, 2024, wraps up the last of the Tax Forums in San Diego, CA
 - On September 19, 2024, the Outreach Committee will have their monthly meeting beginning at 2:00PM, EST
 - ICC will have their meeting on September 19, 2024, beginning at 3:00PM, EST
 - On September 26, 2024, the Joint Committee will have their meeting beginning at 3:00PM, EST

Chair Report

James Wiseman expressed appreciation to everyone attending the meeting and provided the following for the Chair Report:

- The Chairs were able to get together at the Joint Committee Planning Session a couple of weeks ago in Jacksonville, FL. It was a very productive meeting
- Members were reminded of the importance of getting issues out. Quality is better than quantity stressed ensuring good quality referrals
- The By Laws are being redone
- Members were encouraged to become a Chair of a committee to learn a lot and to get their hours in. There will be an award given for volunteering of service commitment

Minutes Approval

TCC August 08, 2024, Minutes were approved as submitted. Wiseman motioned, and Melanie Almeida seconded.

Public Comments

N/A

IRS Responses

Wiseman shared the following updates:

- 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
Both issues were approved by the Joint committee. There are no comments that have been issued back but the issues are with IRS
- Issue 76132, Taxpayers Service on Authenticated Chatbot, TAC members have been working on this issue. There will be a Joint Committee meeting in October. They will be writing up the issue. Information will be shared with members. Members who may be interested in being a part of the volunteer committee

Subcommittee Report

Subcommittee 1

Daniel Halleman shared the following updates:

- Issue 64840 Improving Tax Pro Online Account, Subcommittee 1 has done excellent work on this issue. They have seventeen recommendations. It was submitted to SA and the Attorney Advisor and should be ready for the Joint Committee in October
- Issues #72106, Online Account Features is an ongoing issue. Subcommittee 1 recommended forwarding the issue to the Joint Committee for approval

Michelle Brookens motioned, and Howard Choder seconded

Decision: Full Committee Consensus forward to the Joint Committee for consideration

- Wiseman will present Issue 72106 to the Joint Committee on September 26, 2024

Subcommittee 2

Howard Choder shared the following for Subcommittee 2:

Issue #72107, Online Services and Transcripts. Subcommittee 2 found a lot of changes had been made and updated. Brookens explained the suggestions on how the information is presented would need to be included. Subcommittee 2 will gather additional information and send a revision for changes. They will have a report out for next month's meeting. Members were asked to share any input they may have

Outreach

Almeida shared the following:

- The Tax Forums are concluding and thank you to members who participated
- Debra Kurita, National TAP Chair and Joseph Parampathu participated Super Senior day event posted by their LTAs. Members were encouraged to reach out to their LTA and find out what is available
- The current members administering the Facebook page are third year members. Encouragement for first- and second-year members who may be interested, to write content and do postings. Angela Madison will speak on this
- Members were encouraged to enter their time onto their Activity Reports
- Encouragement to continue to do small activities and account for the time. As time approach to the new Tax year, there will be local Rotary and CPE, library posts onsite, and community Tax breaks. Reach out to some of these events to share some of the SpeakUp Brochures
- The Annual Report Committee can be as much time as a member would like to participate. Almeida participated on last year. Some volunteers who participated were proofreaders. Members were encouraged to consider

- being a part of the Annual Report Committee. Members with questions were encouraged to reach out
- Jimerson added Philip Hwang participated in the San Diego Tax Forum. Hwang shared some of his experience with the committee: It was a great event paired up with the LTA, there were a lot of practitioners, exciting filters potential issues and referral for the future, the biggest was finding out the TAP exists, the appreciation from Taxpayers and IRS employees. There were a lot of focus groups and Hwang added he would do it again. There were twenty-two-hundred people, lots of exposure and lots of education. They ran out of referral sheets and flyers
 - Brookens mentioned Fred Smith had provided a list to the SPEC Indiana and Illinois. They are interested in finding out where there are no TAP members to assist.
 - June hours 373.5, July 445.25, August 1141 hours. Members were thanked for their work

Screening Committee

Brookens asked for a volunteer to assume the role and report out for the Screening Report. Philip Hwang volunteered, and Howard Choder volunteered to assist. Jose Cintron Santiago shared the following updates for the Screening Committee:

- A total of twenty-one issues reviewed, 18 were recommended to close, three will be kept in the Parking Lot
- Madison shared there is no one size fits all in closing issues. Issues are closed that are not in the scope of TAP. Issues are forwarded to the right place if possible. This depends on Cintron to compile the notes and share with Shawn Collins, TAP Director. Issues are discussed and the best action is determined the best option available. Members shared their experience in closing issues in their discussions

Wiseman motion to accept the Screening Report as submitted.

Brookens seconded.

Decision: Full Committee Consensus accept the Screening Report as submitted

Internal Communications Committee

Angela Madison shared the following updates for ICC:

- ICC spoke on bringing in projects to ICC during the Joint Committee Planning Session
- Members with ideas on referrals were asked to forward them to the ICC
- The Facebook page does have some members who are not the third-year members.
- O'Sullivan added one of the issues inadvertently was sent to the TAC Committee on the Screening process. It was sent the members.
- The email list is being looked at to leverage the sources available to get them on the www.IRS.org webpage

- O'Sullivan is currently working on the ICC agenda and prereads
- He will set up a meeting with the Facebook page volunteers
- Discussion will be held on ICC News article for September
- Madison assured O'Sullivan was heard during the Joint Committee meeting and will develop a solution and will discuss during the ICC meeting
- Hwang pointed out there are two TAP Facebook groups. This issue is being worked to delete the one. O'Sullivan added the older is a Facebook group and the current one is the Facebook page
- Members were encouraged that have not volunteered to attend the ICC meetings

Action Items

Cintron Santiago shared the following Action items:

- Forward August 08, 2024, approved minutes to Kevin Brown for posting and post onto www.TAPSpace.org
- Update the system with Issue 68633 and 68081 forwarded to IRS and still waiting for responses
- Update Issue 76132 on the Chatbot
- Joint meeting scheduled of October 01, 2024, working meeting to discuss
- Issue 72106 forwarded and looking forward to the Joint Committee meeting
- Issue 64840 update forwarded to SA and Attorney Advisor
- Issue 72107 update to be revisited next during next month meeting
- Update the system showing the Screening Report was accepted

Roundtable

Wiseman expressed appreciation for member's work being done.

- Members were reminded September 25, 2024 is the due date for the Newsletter Article submission
- Members were encouraged to log hours on their Activity Reports

Jimerson added appreciation to members for their attendance.

Close

The meeting was officially closed at 1:58PM, EST.

**Next Meeting: Thursday, October 10, 2024
1:00PM EST, 2:00PM CST, 10:00AM MST, 09:00AM PST**

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