

**Taxpayer Communications Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Thursday, October 10, 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     |
| • Candace Smith       | Mustang, OK     | Member     |
| • Walter Webster      | Las Cruces, NM  | Member     |
| • Angela Madison      | Los Angeles, CA | Member     |

**Members Absent**

- LaRee Lowman                      Homewood, IL                      Member

**Staff**

- Shawn Collins                      TAP Director
- Jose Cintron Santiago              TAP Program Analyst
- Matthew O'Sullivan                TAP Program Analyst
- Conchata Holloway                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:

- IRS has expanded the 2025 Direct File Program. They have increased the number of states to include Alaska, Connecticut, Idaho, Kansas, Maine,

- Maryland, New Jersey, New Mexico, North Carolina, Oregon, and Wisconsin. For the 2025 filing season, Direct File will support 1099's for interest income greater than \$1,500, retirement income and the 1099 for Alaska residents reporting the Alaska Permanent Fund dividend
- October 15, 2024, TAP Informational Session on Being a TAP Chair or Vice Chair Election will begin at 1:00PM, EST
  - October 16, 2024, The Annual Report Team will have their meeting beginning at 3:00PM, EST
  - October 17, 2024, Outreach Committee meeting will have their meeting at 2:00PM, EST
  - October 17, 2024, Internal Communications Committee will have their meeting beginning at 3:00PM, EST
  - October 24, 2024, The Joint Committee monthly meeting begins at 3:00PM, EST
  - There will be one the TAP year remaining after today's meeting

### **Chair Report**

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

- The TAP year end is approaching with one additional full committee meeting remaining after today. Members were encouraged to finish strong and log in their time
- There are a couple of issues to wrap up before the year's end and begin next year with a clean slate

### **Minutes Approval**

TCC September 12, 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 72106, Online Accounts was presented to IRS and currently waiting for their response
- Issue 76132, Taxpayers Service on Authenticated Chatbot, Subcommittee 1 and Subcommittee 2 met on last week and worked together on this issue. Thank you expressed to Candace Smith and Walter Webster for the work they did on the Chatbot. Subcommittee will finish the recommendation in November. Members were encouraged to submit any recommendations they may have by tomorrow. Jose Cintron will forward the referral to SA and the Attorney Advisor on next week.

**Decision: Full Committee Consensus for conditional approval based upon SA and Attorney Advisor feedback then to the Joint Committee for review and on to IRS**

### **Subcommittee Report**

#### Subcommittee 1

Daniel Halleman shared the following updates:

- Issue 64840 Improving Tax Pro Online Account, Subcommittee 1 wrote fourteen recommendations giving Tax professional better use of Online Services. Issue presented to the Full Committee for approval to forward to the Joint Committee

**Melanie Almeida motioned, and Michelle Brookens seconded.**

**Decision: Full Committee Consensus accept motion to forward Issue 64840 to the Joint Committee for review**

- Wiseman will present to the Joint Committee for review and to be forward to IRS

#### Subcommittee 2

Howard Choder shared the following for Subcommittee 2:

Issue #72107, Online Services and Transcripts. Subcommittee 2 made six recommendations dealing with improving appearance and the content of transcripts. OLS is working on the issue. Subcommittee 2 presented the issue to the Full Committee for conditional approval after SA and Attorney Advisor have their input and on to the Joint Committee.

**Wiseman motioned, and Brookens seconded the issue as conditional approval.**

**Decision: Full Committee Consensus conditional approval after SA and Attorney Advisor approval on to the Joint Committee for review and on to IRS**

### **Outreach**

Almeida shared the following:

- Returning members to TAP for next year were encouraged to begin thinking of their Spring calendar. There will be a lot of organizations and events that have been preplanned their dates. Encouragement to begin speaking with the ones they maybe interested in for Outreach events.

### **Screening Committee**

Philip Hwang shared the following Screening report updates:

- There were fifty-seven issues, forty-nine recommended for closing, five were recommended to be placed in the Parking Lot and three for transfer  
**Wiseman motion to accept the Screening Report as presented, and Almeida seconded.**

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

### **Internal Communications Committee**

Matthew O'Sullivan shared the following updates for ICC:

- There is one issue being worked from last year that was originally for an email list. Now ICC is looking to post information from the meetings onto [www.IRS.gov](http://www.IRS.gov)
- Another issue concerning responsiveness to tracking issues and to issues. This issue was recently received and beginning to do the initial steps.
- A Ad Hoc meeting was scheduled for last month with members interested in helping with the Facebook page. Kyle Kipple volunteered to be the Admin for ICC. There will be another meeting next month
- ICC is working on the process of regularly posting information
- October Newsletter was published.
- Members were reminded to submit their articles. Almeida will do the submission for November

### **Action Items**

Cintron Santiago shared the following Action items:

- Forward September 12, 2024, approved minutes to Kevin Brown for posting and post onto [www.TAPSpace.org](http://www.TAPSpace.org)
- Issue 72106 was approved by the Joint Committee and is under IRS consideration
- Issue 76132 approved by the Full Committee pending SA and Attorney Advisor's review with final review in November
- Issue 72107 approved by the Full Committee pending SA and Attorney Advisor's review with final review in November
- Issue 64840 voted to be presented to the Joint Committee this month
- Screening report approved

### **Roundtable**

Wiseman expressed appreciation for member's work being done.

- Hwang appreciated members collaboration. Members asked to reflect on the amount of work completed. He is proud to be alongside members
- Choder appreciation for being on the committee. Proud to be able to have put together recommendations to help Taxpayers
- Appreciation to Smith who will be ending her TAP term. Members were thanked and appreciated for all the work they have done.
- Brookens encouraged members to continue to do Outreach. She has a couple of events planned for November. She expressed well wishes to members and anticipation on seeing some during the Annual Report meeting

Collins thanked members and expressed appreciation for their time and commitment going above and beyond the calls.

- To third-year members a special thank you was extended. Your presence will be missed and encouragement to continue sharing the word about TAP, sharing experiences as a TAP member and inviting them to be a part of TAP. Even though returning to TAP is not allowed until three years have expired, Collins encouraged third-year members to consider rejoining. Bringing different perspectives together in the end is most important
- To first and second-year members encouragement extended to consider putting your names in for the Chair and/or Vice Chair positions. Do not allow anyone to hold you back

Conchata Holloway extended appreciation to all members of TCC. Thank you all for a fantastic job. Encourage someone to vote for the National Chair and Vice Chair. The calendar invite was sent to members.

Jimerson expressed appreciation and thank you to members for amazing work and the efforts contributed to the process making things better for the Taxpayers. When recommendations are not approved or implemented by IRS, it plants a seed. No effort is discounted.

- To third year members, this will be bittersweet moment but continue to share the word about TAP
- To the first- and second-year members, 2024 TAP year ends on November 30, 2024, in the off cycle from committee meetings, Outreach Outreach! Continue to do the work while TAP is not in meetings, tell people about TAP, think of issues that concern Taxpayers and regroup with lots of rest for the new year

### Close

The meeting was officially closed at 1:42PM, EST.

**Next Meeting: Thursday, November 14, 2024  
1:00PM EST, 2:00PM CST, 10:00AM MST, 09:00AM PST**

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