

**Taxpayer Communications Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Thursday, July 11, 2024**

Designated Federal Officer

- Susan Jimerson TAP West Chief

Attendance

- James (Jim) Wiseman Brentwood, TN Chair
- Michelle Brookens Taylorville, IL Member
- Daniel Halleman Thornton, CO Member
- Philip Hwang Placentia, CA Member
- Candace Smith Mustang, OK Member
- Walter Webster Las Cruces, NM Member

Members Absent

- Melanie Almeida Sandpoint, ID Vice Chair
- Howard Choder Seattle, WA Member
- LaRee Lowman Homewood, IL Member
- Angela Madison Los Angeles, CA Member

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:

- The National Taxpayer Advocate, Erin Collins released two reports. The first one is the Annual Report to Congress and the second one is the Midyear Objective Report. It outlines the objectives for the year. It was delivered on June 26, 2024, it highlights delays in resolving ID Theft

- cases, and impact to burden to Taxpayers. Another area of interest is where the National Taxpayer Advocate, Erin Collins talks about how IRS measure its level of service regarding the Toll-Free phone lines. Members were encouraged to look over the report
- The National Tax Forums have begun. Currently a forum is being held in Chicago and is scheduled to run July 09, 2024, through July 11, 2024. Members will be attending the other forums that will be held in Orlando, Baltimore, Dallas and San Diego There will be TAP Staff and members attending the forums
 - There are four full Committee meetings remaining for this year. There is lots of work to be done in getting referrals completed and forwarded to the Joint Committee for approval prior to forwarding to IRS. Appreciation was express to members for the work being done
 - On July 10, 2024, TAP Annual Quarterly Meeting was. There were speakers from Direct File available to speak with members and provided good information
 - The Outreach Committee will have their meeting on July 18, 2024, beginning at 2:00PM, EST and is led by TAP National Vice Chair, Michelle Brookens and attended by the Vice Chairs
 - On July 18, 2024, ICC will have their monthly meeting beginning at 3:00PM, EST. Discussion on the internal and external communications and messaging for TAP
 - The Joint Committee will have their monthly meeting on July 25, 2024, beginning at 3:00PM, EST. This is a meeting with the TAP Chairs to review the referrals that have been submitted for approval and forward to the IRS. They also discuss other topics relative to TAP

Chair Report

James Wiseman provided the following for the Chair Report:

- Members were thanked for making quorum and encouraged the momentum going forward
- There are three meetings left to move forward
- Members were encouraged to enter their time into the Activity Reports
- Appreciation was expressed to members for the productive meetings held
- Encouragement expressed to continue the work in progress, be informed, make sure efforts are used and productive. Continue to try and connect and keep communications lines open to assist the teams in their efforts

Minutes Approval

TCC June 13, 2024, Minutes were approved with corrections.

Michelle Brookens motioned, and Philip Hwang seconded.

Public Comments

N/A

IRS Responses

Wiseman shared three committee updates where feedback was received and two issues will be presented during the July 25, 2024, Joint Committee meeting.

- Issue 48868 the response has been accepted by the committee and will be presented to the Joint Committee on July 25, 2025. There are eight recommendations: five adopted, one partially adopted, and two are under considerations:

2601 IRS response to Taxpayers with clear instructions on what to expect when if direct deposit refund was rejected by their financial institution was adopted with implementation next month and add additional instructions

2602 IRS to update get your refund faster was adopted

2603 increase search terms on www.IRS.gov was adopted

2604 allow Taxpayers to update their online account was adopted

2605 IRS to include information on the instructions for F8822, Change mailing address was adopted. Implementation to be determined

2606 update to letters CP53A and CP53C was partially adopted. Jose Santiago will follow up on the response and share findings with members

2607 allow Taxpayers to make update to their financial institution information online account is under consideration

2608 has the same instructions as 2607

Halleman motioned to accept and monitor the ones under consideration. Michell Brookens seconded

Decision: Full Committee Consensus accepted

- Issue 68633, Approve EIN Online Application Experience for Taxpayers has three recommendations. Request approval to elevate to the Joint Committee.

Brookens motioned to accept, and Daniel Halleman seconded

Decision: Full Committee Consensus to accept

- Issue 68081, F911 submit online, fax or in person

Brookens motioned to accept for submission in two weeks to the Joint Committee and Daniel Halleman seconded

Decision: Full Committee Consensus accept

Subcommittee Report

Subcommittee 1

Halleman shared the following updates for Subcommittee 1:

- Issue 64840 a Taxpayer was having issues making changes post submission on F941, this issue is still under consideration. Conchata

Holloway informed the committee discussions will be forthcoming during next month's meeting

- Issues #72106, Online Account Features is an ongoing issue. Variations of the same issues continues to be presented in the Screening Committee. Halleman suggested the committee stay involved with the possibility of anticipated focus groups to come or reach out for further involvement

Subcommittee 2

Santiago shared the following for Subcommittee 2:

Issue #72107, Online Services will have and SME discussion was held within the committee. Taxpayer-requested data: Why they need it and how we can help them achieve their goals. Howard was not available Wiseman spoke to this, indicated that we may not be able to do this as a referral, however more research can be done, and we can see is anything new comes from screening that may address this. Susan suggested to look on irs.gov for how the IRS presents information on how taxpayers can request this data.

Outreach

Brookens shared the following:

- The Outreach committee is focusing on Activity hours and Outreach
- Great responses were received from the committees Vice Chairs to make the information about the need and the importance of activity reporting, it has doubled from one month to the next
- Efforts are being pushed to encouraged members to go to the Facebook page and repost what is already posted. This would help encouraged and make aware of job posting when available
- Encouraged the use of Outreach materials. Although some of the materials did not arrive for Chicago forums, anticipation of having some of the materials available for the upcoming Forums is hopeful
- Members were encouraged to use their business cards and have them available wherever they go. They should also utilize the SpeakUp Brochures to direct attention to www.ImproveIRS.org website
- Thank you expressed to members for making TCC the top contributor in activities for this month
- There are six members from TCC with over a hundred hours and congratulations expressed
- The issue with the online portal has been resolved in reporting hours

Screening Committee

Michelle Brookens shared the following for the Screening Report:

- A total of sixty-four issues reviewed, sixty-one were recommended to close, two transferred, one will be kept in the Parking Lot, eight were recommended to contact TAS for the Taxpayers, nine were recommended

information to be sent to the Taxpayers. two were recommended to be sent to Shawn Collins with complaints, and one additional to Collins with compliments

Brookens motion to accept the Screening Report as submitted. Halleman seconded. Brookens motioned to accept the decision from last month's meeting to close the five issues presented by the Screening Committee and Halleman seconded.

Decision: Full Committee Consensus accept the Screening Report as submitted for today and last month

Internal Communications Committee

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

- The edits to the SpeakUp Brochures have been completed and the issue has been closed out. ICC was informed IRS will be making available copies of the brochures at the VITA Sites beginning next year
- The issue generated during last year on having an email listing for Taxpayers who wanted to be in on the TAP meetings has some difficulties that may not be workable. Members mentioned other avenues IRS has in reaching Taxpayers with a possible revision. Members are still working on a better way.
- Members were invited to join in on ICC members' next meeting

Action Items

Santiago shared the following Action items:

- Forward June 13, 2024, approved minutes to Kevin Brown for posting and post onto www.TAPSpace.org
- Update the system with Issue #48868 waiting for response on recommendation and close accepted recommendations
- Follow up on the recommendations for CP53A and CP53C
- Issue 68633 and Issue 68081 will be forwarded to the Joint Committee
- Issue 64840 follow up on SME for next committee meeting
- Issue 72016 and Issue 72107 follow up on receiving information for next Subcommittee meetings

Roundtable

Jimerson expressed thank you for doing a great job on today's meeting. Appreciation was expressed to members for the work being done.

Close

The meeting was officially closed at 1:56PM, EST.

**Next Meeting: Thursday, August 08, 2024
1:00PM EDT, 2:00PM CDT, 10:00AM MDT, 09:00AM PDT**

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