

**Taxpayer Communications Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Thursday, November 14, 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     |
| • LaRee Lowman        | Homewood, IL    | Member     |
| • Angela Madison      | Los Angeles, CA | Member     |
| • Candace Smith       | Mustang, OK     | Member     |
| • Walter Webster      | Las Cruces, NM  | Member     |

**Members Absent**

- |                 |             |        |
|-----------------|-------------|--------|
| • Howard Choder | Seattle, WA | Member |
|-----------------|-------------|--------|

**Staff**

- |                         |                              |
|-------------------------|------------------------------|
| • Shawn Collins         | TAP Director                 |
| • Jose Cintron Santiago | TAP Program Analyst          |
| • Matthew O'Sullivan    | TAP Program Analyst          |
| • Annie Gold            | TAP Administrative Assistant |

**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:

- Tonight, at midnight will be the last day to place your votes for the 2025 TAP National Chair and Vice Chair. It is open to all members
- November 15, 2024, TAP Graduation Ceremony will be held beginning at 1:00PM, EST

- Congratulations to Angela Madison, Candace Smith on the completion of their three-year term with TAP
- The announcement for TCC Chair and Vice Chair will be announced during the ceremony
- First and second-year members were reminded to submit their committee preferences with three choices for the 2025 committee to be on by November 22, 2024
- November 14, 2024, Internal Communications Committee will have their final meeting for the year beginning at 3:00PM, EST
- November 21, 2024, Outreach Committee meeting will have their meeting at 2:00PM, EST
- November 21, 2024, The Joint Committee monthly meeting begins at 3:00PM, EST
- This has been a great year. Continuing members were encouraged to continue doing Outreach and submitting issues

### **National Office Report**

Shawn Collins expressed appreciation and thanked members for their commitment to TAP.

- The TAP would not be the program it is without each member who have been so passionate and by putting your hearts into it
- Congratulations to the third-year members on their graduation tomorrow. They will be missed
- Collins is looking forward to working with the first and second-year members during TAP year 2025

### **Chair Report**

Melanie Almeida, acting for Jim Wiseman expressed appreciation to everyone attending the meeting and provided the following Chair Report:

- Thank you expressed to the Staff for all the work they do
- Tomorrow graduation ceremony will be a special time to hear what the graduates have experienced and some of the wisdom they will share
- Returning members were encouraged to begin to think of becoming a committee Chair or Vice Chair
- The Activity Report will be available to members who will still be an active member during the down time
- Members who will be hosting events, responding to emails, reaching out to your communities were advised to report the activity. Members will be able to report the activity to the Internal Communications Committee
- The TAP Staff will continue to work. Members having problems with [www.TAPSpace.org](http://www.TAPSpace.org) were encouraged to reach out to the staff. They will be available to assist

### Minutes Approval

TCC October 10, 2024, Minutes were approved with update.  
Michelle Brookens motioned, and Daniel Halleman seconded.

### Public Comments

N/A

### IRS Responses

Almeida shared the following updates:

- Issue 72107, Taxpayers Requested Data has been approved and is with IRS. Currently waiting on their response
- Issue 64840, Tax Pro Online Account was approved by the Joint Committee and is now waiting on IRS response
- Issue 76132, Taxpayers Service on Authenticated Chatbot has been approved by the Joint Committee and is with the IRS. The committee is waiting for their response
- A total of six issues were accomplished this year

### Subcommittee Report

Halleman shared the following for the Subcommittee 1 Screening Report for October 23, 2024:

- There were fifty-one issues. The majority were recommended for closing. One issue was assigned to the Parking Lot, and one was transferred
- Halleman motioned to accept the Screening Report and Almeida seconded**

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

Subcommittee 2

Jose Cintron shared the following for Subcommittee 2 Screening Report:

- Subcommittee 2 met on November 05, 2024
- They reviewed fifty-three issues: forty-two were for closing, three were for transfer and eight issues for the Parking Lot

**Brookens motioned to accept the Subcommittee 2 Screening Report and Angela Madison seconded**

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

### Outreach

Almeida shared the following:

- It is always good and interesting to sit in on the Outreach Committee and hear what members are doing
- Members were encouraged to continue to send activity events to O'Sullivan and Cintron to get the information onto the Facebook page

- Information will continue to be posting during the TAP down time when the committees are not meeting
- The TAP Staff will continue working. Members needing Outreach materials should reach out to Kevin Brown

### **Screening Committee**

Philip Hwang shared the following Screening report updates:

- The Screening Committee reviewed one hundred-sixty issues: fourteen were recommended for the Parking Lot, and six for transfers
- The Screening Committee has adopted a new process of reviewing the report offline. This process has made the review time during the meeting more productive when reviewing a large volume of issue during the meeting time. Currently the are caught up until August 07, 2024
- During their meeting, there was a lot of feedback on ID ME. The Screening Committee consolidated and created issue to find liaison between IRS and ID ME to funnel the users feedback help with improvement

**Almeida motioned to accept the Screening Report and Madison seconded.**

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

### **Internal Communications Committee**

Madison shared the following updates for ICC:

- There is still time to increase awareness through Outreach
- Madison shared an interaction she had where the individual was having a hard time getting in touch with the LTA in Georgia. She directed the individual to the [www.ImproveIRS.org](http://www.ImproveIRS.org) for information. Emphasis on how important the work being done by TAP was stressed not to make light of it. There are opportunities right in your backyards to increase awareness and to let them know the National Taxpayers Advocate, Erin Collins office exists in the Commissioner's office
- Most of the items with ICC are continuations. They are waiting for information. Continuing members will be able to follow through
- Adding [www.ImproveIRS.org](http://www.ImproveIRS.org) to the IRS web page is moving forward
- ICC will have a meeting on today
- Thank you to everyone was expressed and encouragement to remember there is always opportunity to do Outreach

### **Action Items**

Cintron Santiago shared the following Action items:

- Forward October 10, 2024, approved minutes to Kevin Brown for posting and post onto [www.TAPSpace.org](http://www.TAPSpace.org)

- Update the system with Issues 72107, 64801, and 76132 as approved to go to the Joint Committee
- Update the Screening Reports for September 30, 2024; October 04, 2024; October 22, 2024; October 23, 2024
- Thank you to members for their commitment and the work done throughout the year. To Madison and Candace Smith thank you
- Almeida added the total hours for the committee is one thousand six hundred seventy-six. Averaged out over ten members would be one hundred sixty-seven hours
- Thank you to members who have reported their time and who volunteered and did not report their time

O'Sullivan reminded members a volunteer is needed to do the December Newsletter submission. Hwang volunteered to do the submission

### **Roundtable**

Almeida expressed appreciation for member's work being done.

- Hwang expressed appreciated members and working together
- Almeida had to leave but expressed thank you and appreciation to members. She is looking forward to seeing everyone at the graduation ceremony
- Brookens shared she has an additional forty hours in. She attended the University of Illinois Tax School where three hundred people participated. She sat with LTA for Chicago and Springfield area. Members were encouraged to continue to do Outreach

Jimerson expressed appreciation and thank you to members for a great year and meeting. She has enjoyed working with each member. To the graduating members a special thank you extended.

- Candace Smith expressed thank you to all for all the work that has been done. Best wishes moving forward
- Madison expressed thank you to everyone.

### **Close**

The meeting was officially closed at 1:38PM, EST.

**See everyone at the Graduation Ceremony on tomorrow!**

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