

**Taxpayer Communications Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Thursday, March 13, 2025**

Designated Federal Officer

- Susan Jimerson TAP West Chief

Attendance

- Melanie Almeida Sandpoint, ID Chair
- Philip Hwang Placentia, CA Vice Chair
- Michelle Brookens Taylorville, IL Member
- Daniel Halleman Thornton, CO Member
- Tasha Preisner Alvarado, TX Member
- Alan Seidman Bedford NH Member
- Walter Webster Las Cruces, NM Member
- James (Jim) Wiseman Brentwood, TN Member
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Members Absent

- Timothy (TJ) McGinley Rancho Palos Verdes, CA Member

Staff

- Shawn Collins TAP Director
- Jose Cintron TAP Program Analyst
- Kelvin Johnson TAP Program Analyst
- Conchata Holloway TAP Program Analyst
- Annie Gold TAP Administrative Assistant

Quorum

Quorum was not needed for today's administrative meeting.

Welcome and DFO Report

Susan Jimerson opened the meeting and welcomed all new and returning members to the call. She provided an introduction of her role as the DFO/Manager for the TCC committee along with the Staff who will be available for their support. A brief overview of the TAP process and the agenda was shared.

- Members were encouraged to continue doing Outreach

- Outreach materials are in the process of being mailed out to each member by Annie Gold

National Office Report

Shawn Collins thanked and welcomed members to the call and for being a part of TAP. The following updates were shared:

- Members were advised to clear their calendars for April 21, 2025, through April 25, 2025. There will not be a Face-to-Face meeting this year due to the budget constraints
- Management, TAP National Chair and Vice Chair will be working to schedule a virtual FTF meeting. Additional information will be shared
- Outreach is very important. Members were encouraged to continue to do Outreach. Mileage reimbursement may be approved locally with management approval prior to participating. Members should contact their Analyst for information pertaining to their mileage approval before traveling to an event
- The TAP Staff is back in the office working
- The National Taxpayer Advocate, Erin Collins sent an email message requesting a response from TAP. Members were asked to provide topics with feedback on the most serious problems Taxpayers are facing. Make sure to provide a topic and a blurb in the response to Conchata Holloway. Members responses are due to Conchata Holloway on Tuesday, March 18, 2025
- Appreciation was expressed to members for all the work they are doing

Chair Report

Melanie Almeida welcomed members to the call and shared the following updates:

- Members learn by working together. This is a team project
- The Minutes will not be voted on during this meeting, but a review will be conducted
- A review of today's agenda was emphasized
- A review of the November Minutes was done during last month's meeting
- Members were asked for any comments on the reviewing of the minutes

Minutes Approval

TCC February 20, 2025, Minutes were reviewed for accuracy and grammar. They will be approved during next month's full committee meeting.

Public Comments

None

Full Committee Updates

Almeida shared the following updates:

- Issue 77882, Communicating with the IRS: Taxpayer and Tax Professional Perspective. This issue is an invitation from IRS and both Subcommittees are working this issue. Additional information to come. The following Issues are an update on the Issues submitted to IRS last November 2024 to not lose track of these Issues. The committee is still waiting for IRS response:
- Issue 72107, Taxpayer Requested Data
- Issue 64840, Tax Pro Online Account
- Issue 76132, Taxpayer Service on Authenticated Chatbot

Subcommittee Reports

Subcommittee 1

Tasha Priesner shared the following updates for Subcommittee 1:

- Issue 77910- Leveraging Social Media Data to Improve Taxpayer Service and Compliance. Subcommittee 1 discussed this issue and came up with a list of questions they need answers to. They requested to have a SME attend their next meeting. They are looking to know if the Issue will be in house or outsourced, data analytic software, are a just a few of the questions they need answers to

Subcommittee 2

Philip Hwang shared the following updates for Subcommittee 2:

- Issue 77909, Taxpayer understanding of Form 8821 Tax Information Authorization. Subcommittee 2 had questions and will be working through this issue together. They decided to start drafting a referral and then determine if a SME would be requested

Outreach Report

Hwang shared the following Outreach updates:

- The Outreach Committee will have their meeting on March 20, 2025
- They are consolidating with the Internal Communications Committee

Screening Committee

Alan Seidman shared the following updates for the Screening Committee:

- The Screening Committee had their meeting
- There were thirty-two issues, fifteen were reviewed, eleven were closed, four were placed in the Parking Lot
- Cintron posted the report
- Almeida added the report will be approved during next month's meeting

Internal Communications Committee (ICC)

Daniel Halleman shared the following updates for ICC:

- ICC will be working with the Outreach Committee
- They will have their meeting on next week
- Members were asked to volunteer to do the Newsletter articles going forward. The articles are due by the 25th of each month. Fred Smith is the Lead Analyst covering the Newsletter
- Halleman volunteered to do the article for April
- Hwang volunteered to do the article for May
- Jim Wiseman volunteered to do the article for June
- Michelle Brookens volunteered to do the article for July
- Walter Webster volunteered to do the article for August
- Almeida volunteered to do the article for September
- A volunteer will be needed for October and November during next month's meeting
- Preisner volunteered to do the article for December
- The TAP Newsletter is available in www.TAPSpace.org for members to view

Action Items

Cintron stated he will complete the following action items:

- The minutes have been reviewed and will be approved during next month's meeting
- Issue 77882 will be worked by the full committee. TFPL is working this issue as well
- Request a SME for subcommittees issues 77910
- Issue 77909 initiate F15214
- Outreach meeting on next week
- Review of the Screening Report

Roundtable Comments

Almeida asked for comments for the Roundtable:

- Michelle Brookens, TAP National Chair stated not having the FTF is a bummer. She is looking forward to the combined virtual meeting and having the leadership meeting. Mitch Gerstein is working with Fred Smith on the Outreach. There is a lot of Outreach to do. Members were encouraged to do Outreach by talking to neighbors, churches, children schools.
- Hwang encouraged members to reach out to local VITA sites and partner with the site coordinators, and the LTAs. Remember to log in all hours in the Activity Reports

- Wiseman added he is disappointed not having a FTF. He will be reaching out to his LTA. He will also be contacting his Representatives to support IRS

Collins added management along with the TAP National Chair and Vice Chair are working on the Joint Committee's FTF around the months of June or July 2025. She is waiting to hear information on the Tax Forums. Additional information will be shared

Jimerson expressed appreciation and thank you members. The purpose of F8821 is to give a person access not a representation. Members who may be interested were encouraged to reach out to Cintron.

Closing

Jimerson officially closed the meeting, at 2:40PM, EDT.

**Next Meeting: Thursday, April 10, 2025
1:00PM EDT, 2:00PM CDT, 10:00AM MDT, 09:00AM PDT**

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