

**Joint Committee (JC)  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
March 14, 2025**

**Designated Federal Official (DFO)**

- Cedric Jeans Acting TAP Director

**Members Present**

- Melanie Almeida Chair, Taxpayer Communications Committee
- Michelle Brookens TAP National Chair
- Jason Crispin Chair, Tax Forms and Publications Committee
- Quan Doan Vice-Chair, Taxpayer Assistance Center Committee (TAC)
- Anthony Earwood Chair, Toll-Free Phone Lines Committee
- Mitchell Gerstein TAP National Vice-Chair
- Steven Hall Chair, Special Projects Committee
- Steven Sklar Chair, Notices and Correspondence Committee
- Jim Simpson Chair, TAC (Absent)

**Staff**

- Kevin Brown TAP Management Assistant
- Conchata Holloway TAP Program Analyst
- Susan Jimerson TAP West Chief
- Kelvin Johnson TAP Program Analyst
- Ann Tabat TAP Program Analyst

**Members of The Public**

None

**Welcome**

Jeans welcomed everyone and opened the call at 12:00 pm ET. Jeans reported the federal register notices were not allowed to be posted, meaning this meeting is not open to the public and nothing can be voted on. The next meeting will be open to the public.

**Roll Call**

Brown completed roll call.

**Review Agenda**

Brookens reviewed the agenda.

**National Office Update/ TAP East Manager Update**

Jeans reported the TAP bylaws were approved on a bilateral basis. The review process can be done every two years on the even years moving forward. Jeans reminded the committee to make every effort to make quorum and allow committee business to be advanced timely. Jeans suggested visiting other committee meetings to find out what they are working on. You never

know what you might find out attending different meetings. There will be chair training probably next month to better prepare chairs to run their meetings.

Jeans reported due to travel restrictions there will be no face-to-face meeting. The hope is something changes for the JC planning session. The 2025 tax forums have been announced, Gerstein inquired if we could travel to this. Jeans indicated there is no decision at this time, but the staff will notify the committee if this changes. Local outreach is still allowed but has to be approved five to ten business days beforehand.

An email will go out introducing the TAP members to their Local Taxpayer Advocates (LTA) and Local Income Tax Clinic (LITC) for outreach opportunities for TAP members, per Jeans. Jeans indicated that meeting minutes can be used for JC meeting report, the newsletter and for outreach. Share this with your committee members. If there is a government shutdown, all TAP activities will have to cease until the government reopens.

### **TAP West Manager Update**

Jimerson reported launching the 2024 Annual Report on [www.improveirs.org](http://www.improveirs.org) for your viewing. Hard copies are being printed soon. Jimerson reported the staff is sending Speak-Up brochure to be delivered soon. Jimerson said please ask if you need any more brochures at any time in the TAP year. Kelvin Johnson is now with TAP East and over the Special Projects committee.

### **Review of November JC Meeting Minutes**

November 21, 2024, meeting minutes tabled to next month.

### **TAP Chair Report**

Brookens thanked everyone who stepped up for a leadership role. We are working with leadership on a full virtual meeting possibly in July.

Schedule Recurring JC Meeting  
Fourth Thursday 2pm ET

The November meeting will take place on November 20, 2025, due to Thanksgiving.

### **TAP Vice-Chair Report**

Gerstein report the first ICC meeting will be next Thursday, March 20, 2025. Gerstein wants each member to tailor their outreach to what works best for them. Please find your own path with outreach activity. Please like and follow the TAP Facebook page and complete your activity reports with all TAP activities on [www.tapSPACE.org](http://www.tapSPACE.org). The resource tab has been updated in the outreach toolkit, so it is easily located. This helps with outreach according to Gerstein.

## **Project Committee Review/Activities**

### **Notices and Correspondence**

Sklar reported for outreach, there is a new member doing outreach on a TV format soon.

Sklar reported the committee has three projects ready for JC. We are looking forward to a new year, per Sklar.

### **Special Projects**

Steven Hall is looking forward to a good year and he hopes to continue the success of previous years. A Subject Matter Expert (SME) was requested on two issues, with one other referral being worked.

### **Tax Forms and Publications**

Jason Crispin reported subcommittee working on two projects form 8821 and form 1040x. Subcommittee 2 form 8936 and Instructions and form 1099 NEC and form 1099 IS Systems. They have one issue awaiting response from last year. Crispin reported two issues that are back after Attorney Advisors (AA) and Systemic Advocacy (SA) review, with the subcommittees.

### **Taxpayer Assistance Center Improvements**

Quan Doan reported working three projects: reviewing the Volunteer Income Tax Assistance (VITA) handbook; Reviewing authorizing people to access a taxpayer's information.

### **Taxpayer Communications**

Melanie Almeida reported working with Forms and Pubs and TAC in a collaboration on form 8821. Each committee has a different focus area with this form, per Almeida. Almeida is looking forward to a good year. Jeans indicated one committee will be the lead when the project is ready to go to JC. The lead committee will be determined at the next JC meeting.

### **Toll-Free**

Anthony Earwood has six new members and working to get them acclimated with how TAP works and focusing on ways to bring everyone up to speed. Issue 78148 Live Chat Technology from Electronic Product and services; Issue 74653 Streamline Phone Service; and Issue 78239 which is communication with the IRS, Taxpayer and Tax professional perspective, per Earwood. Earwood reported having a joint subcommittee meeting with an SME next month to get a better understand of how to fix this issue.

### **ICC/Outreach**

None

### **Action Items**

- November 21, 2024 minutes tabled to next month
- Meetings set for Fourth Thursday 2pm ET (Invite to be sent by Holloway)
- Form 8821 collaboration discussion (Communication, Forms & Pub and TAC)
- ICC March 20, 2025
- Annual report live
- Post Annual Report to Facebook
- Respond to the National Taxpayer Advocate (NTA) request for Most Serious Problems (MSP) email by Tuesday March 18, 2025.
- Ask for speak up brochures if you need them

**Roundtable**

Gerstein inquired about the date the last report was pulled.

**Closing**

Jeans thanked the committee for a very productive meeting. Let us know if something should be changed. Brookens appreciates everyone's time for the TAP activities. Jeans spoke of how important it is to respond to the NTA's inquiry about MSPs.

Jeans spoke of how important the work that TAP does is to the American public. Speak about the importance of TAP while you are doing your outreach as TAP has a faster impact with our work because the IRS responds quickly to TAP recommendations in addressing taxpayer issues. This is faster than most other federal advisory committees. Speak of how we are a very effective advisory committee that gets things done in real time. Jeans closed the call at 1:12pm ET.

**Next Joint Committee Meeting: April 21, 2025, at 2:00pm ET/CT/MT/WC**

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