

**Taxpayer Communications Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Thursday, April 10, 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 |
| • Timothy (TJ) McGinley | Rancho Palos Verdes, CA | Member |
| • Tasha Preisner | Alvarado, TX | Member |
| • Walter Webster | Las Cruces, NM | Member |
| • James (Jim) Wiseman | Brentwood, TN | Member |

Members Absent

- | | | |
|-------------------|--------------|--------|
| • Daniel Halleman | Thornton, CO | Member |
| • Alan Seidman | Bedford, NH | Member |

Staff

- | | |
|---------------------|------------------------------|
| • Shawn Collins | TAP Director |
| • Jose Cintron | TAP Program Analyst |
| • Kelvin Johnson | TAP Program Analyst |
| • Conchata Holloway | TAP Program Analyst |
| • Mathew O'Sullivan | TAP Program Analyst |
| • Annie Gold | TAP Administrative Assistant |

Quorum

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.

National Office Report

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

- Outreach is very important. Members were encouraged to continue to do Outreach.
- 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 of November, February and March will be voted on during this meeting
- A review of today's agenda was emphasized
- Members were asked for any comments on the reviewing of the minutes

Minutes Approval

TCC November 14, 2024, February 20, 2025, and March 13, 2025, Meeting Minutes were approved.

Public Comments

None

Full Committee Updates

Almeida shared the following updates:

- Issue 77882, Communicating with the IRS: Taxpayer and Tax Professional Perspective. On April 3, 2025, TCC joined efforts with Toll Free lines and met with SMEs from the IRS to clarify doubts about the IRS Chatbot and what should be addressed in a potential referral. As a result of the meeting, TCC decided to initiate a referral and start drafting recommendations. TCC members will provide their recommendations and will discuss the referral during the next subcommittee meetings.

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. It was previously decided to request an SME from the Strategy and Solutions division to discuss the project. The IRS agreed to send multiple SMEs to the subcommittee meeting of May 1, 2025.

Subcommittee 2

Walter Webster shared the following updates for Subcommittee 2:

- Issue 77909, Taxpayer understanding of Form 8821 Tax Information Authorization. Subcommittee 2 members decided to start drafting a referral and will complete it and discuss it by the next subcommittee meeting.

Outreach Report

Philip Hwang shared the following Outreach updates:

- Members were encouraged to continue doing outreach and promoting the Panel
- Members were encouraged to log in their activity report to TAPspace

Screening Committee

Webster shared the following updates for the Screening Committee:

- The Screening Committee had 2 screening sessions
- The team reviewed a total of 44 issues and decided that 36 issues should be closed, 7 Parking Lot and 1 issue should be Transfer (to Toll Free Lines)
- The report was approved as presented

Action Items

Cintron stated he will complete the following action items:

- The minutes have been reviewed and will be approved
- Issue 77882 will be worked by the full committee.
- SME meeting scheduled for May 1, 2025, for issue 77910
- Issue 77909 initiate F15214
- Screening Report was approved

Roundtable Comments

Almeida asked for comments for the Roundtable:

- 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
- Jimerson expressed appreciation and thank all members.

Closing

Jimerson officially closed the meeting, at 2:41PM, ET.

**Next Meeting: Thursday, May 8, 2025
2:00PM ET, 1:00PM CT, 12:00PM MT, 11:00AM PT**

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