

**Joint Committee (JC)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
April 24, 2025**

Designated Federal Official (DFO)

- Shawn Collins TAP Director

Members Present

- Melanie Almeida Chair, Taxpayer Communications Committee
- Michelle Brookens TAP National Chair
- Jason Crispin Chair, Tax Forms and Publications Committee
- 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, Taxpayer Assistance Center Committee (TAC)

Staff

- Kevin Brown TAP Management Assistant
- Jose Cintron TAP Program Analyst
- Conchata Holloway TAP Program Analyst
- Cedric Jeans TAP East Chief
- Susan Jimerson TAP West Chief
- Kelvin Johnson TAP Program Analyst
- Rosalind Matherne TAP Program Analyst
- Matthew O'Sullivan TAP Program Analyst
- Robert Rosalia TAP Program Analyst
- Fred Smith TAP Program Analyst
- Ann Tabat TAP Program Analyst

IRS Staff

- Martina Coats-Nance Taxpayer Services Supervisor
- Dale Hawkins Taxpayer Services Tax Analyst

Members of The Public

None

Welcome

Collins welcomed everyone and opened the call at 12:00 pm ET.

Roll Call

Brown completed roll call.

Review Agenda

Brookens reviewed the agenda.

National Office Update

Collins was glad the meeting was open to the public and reported the staff is still waiting to see what happens as the administration continues to make changes, but there is nothing new to report as this time. The staff is putting together something for TAP since we were unable to have a face-to-face meeting this year.

TAP West Manager Update

Jimerson reported having good subcommittee calls in April and the work is coming together quite well. Jimerson is looking forward to the collaboration with TAP program.

TAP East Manager Update

Jeans had nothing until round table.

Review of November JC Meeting Minutes

November 21, 2024. Sklar motioned; Earwood seconded.

Action: Minutes accepted as corrected.

March 14, 2025. Hall motioned; Sklar seconded.

Action: Minutes accepted as corrected.

TAP Chair Report

Brookens reminded everyone to attend as many meetings as possible since one committee did not make quorum last month. The tax forums are starting up and some members are visiting and going on their own. Reach out to Brookens or the analyst for information about them. Record your TAP activity on the activity report please.

TAP Vice-Chair Report

Gerstein deferred to Fred Smith for the Outlook committee report later.

Public Comments

None

Project Committee Review/Activities

Notices and Correspondence

Sklar reported on Issue 73865 CP04 Military Dates of Service.

This issue seeks to help the taxpayer understand better what is expected to for more efficiency. Hall inquired about Quick Response (QR) and whether it should read QRC or QR code. "QR code" will be the final version.

Earwood inquired if this should be on an Armed Forces tax guide? Sklar agreed and thought it could be added as a suggestion in the future. Almeida motioned; Earwood seconded.

Action: Issue elevated to the IRS for consideration.

Issue 71594 LTR 38 Reminder Balance Due

This issue seeks to help the taxpayer understand what is being asked. Some suggestions are to mention the tax year; share the tax form number; add a phone number to contact an office so they don't have to search for one; and make the formatting for easier to read. Gerstein indicated we want to create a standardize account for such issues. Earwood motioned; Hall seconded.

Action: Issue elevated to IRS for consideration.

Tax Forms and Publications

Jason Crispin reported Issue 70105, F1098 Mortgage Interest Statement and Instructions Crispin indicated there were 26 recommendations to the form and the instructions to improve clarity, completeness and ease of use for the taxpayer. Sklar motioned; Simpson seconded.

Action: Issue elevated to IRS for consideration.

Issue 69638, F1098 Entity Classification

This issue seeks to simplify some of the wording on the form; to condense addresses to cut down on sending forms in places it doesn't belong; make it easier for businesses to change the address; add links and tips on who must file, and timeline for when IRS while report out to taxpayers. There was a total of 18 recommendations. Earwood motioned; Sklar seconded.

Action: Issue elevated to IRS for consideration

Special Projects

Steven Hall spoke about Issue 78238 Protecting taxpayer information. This issue is still being worked since it conflicts with the Taxpayer Bill of Rights. The committee is trying to be as objective as possible on this issue. The committee dropped the issue on non-custodial parents filing using their children. Hall said they hope to have a referral for next month.

Taxpayer Assistance Center Improvements

Simpson reported screening issues with 25 being out of scope; five were sent to other committees; and several issues concerning, disabled, homeless and elderly taxpayers are being researched. The subcommittees are working with Stakeholder Partnerships, Education & Communication (SPEC) to review some Volunteer Income Tax Assistance (VITA) center materials.

Subcommittee 2 is looking to unmask Employee Identification Numbers (EINs) on transcripts, so taxpayers have easier access to this information.

Taxpayer Communications

Melanie Almeida reported meeting with Toll Free on April 1, 2025, to discuss Chat Bot and Voice Bot features. This led to an issue currently being worked by the committee. We hope to have a referral related to this very soon.

Toll-Free

Anthony Earwood working on several issues such as Issue 78148 chat bot and live chat, and Issue 74653. The committee will have another timeline on surveys this year also. The reports the committee is looking for are from customer satisfaction surveys, burden surveys and focus

groups surveys also. The committee is doing outreach with Local Taxpayer Advocates (LTAs), SCORE San Antonio, other local small business groups and SPEC.

The meeting time will be changed to be more sensitive to the large time zones this meeting covers. Earwood continues to remind everyone to do outreach reports.

ICC/Outreach

Smith reported cancelling this month's meeting and will resume next month. Everyone should have received TAP outreach materials. We will have no attendees at this year's tax forums. We can provide outreach materials if you need them for this event. Keep an eye out as they may cancel the tax forums, but more to come.

Action Items

- November 21, 2024, March 14, 2025, minutes accepted
- Issues 73865, 71594, Notices, approved to elevate to IRS
- Issue 69638; 70105, Forms & Pubs., approved to elevate to IRS

Roundtable

Brookens reported working with the Springfield, IL LTA on outreach events. Simpson spoke about looking for program regarding the American Opportunity tax credit that was expected from IRS, but he cannot find it. Also, the callback feature was unavailable when he called for help. Jeans said it could be checked if it is the 800 number, we can check on it.

Earwood, Personally Identifiable Information (PII) is tightly controlled so doesn't know how it is getting out to the public regarding issue 78238. Gerstein spoke on goals to improve the IRS and all the efforts we are a part of to accomplish this goal. We have to keep pushing forward to achieve these goals.

Almeida reminded everyone not to sponsor pet projects and stay in line with our Charter and its focus. Almeida inquired about this process and if she is seeing it correctly relating to the Charter and the committee focus.

Jeans reported the deferred program and noted several staff members accepted it and will leave us with a smaller staff to support the TAP program. Jeans encouraged everyone to use the Annual Report to show what the TAP has done. Jeans thanked the staff and the members for all their work. Brookens offered thoughts and prayers to those going through a lot at this time.

Closing

Collins reiterated the job is to improve the IRS, keep the momentum going, keep pushing forward and thanked everyone for their dedication to the program and keep letting taxpayers know how we are helping them. Jimerson thanked everyone for all they do and reflected how TAP is the voice of the voiceless. Thanked everyone for all they do. Collins closed the call at 2:56pm ET.

Next Joint Committee Meeting: May 22, 2025, at 2:00pm ET/CT/MT/WC

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