Taxpayer Advocacy Panel
IMPROVING THE IRS

TAP – One Voice for Change

"Citizen Volunteers Valued for Improving IRS Services"

Joint Committee Agenda

Thursday, July 23, 2025

3:00 PM ET; 2:00 PM CT; 1:00 PM MT; 12:00 AM PT

MS Teams – click to join meeting (audio included)

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Topic	Leader
Welcome	John Lipold, Designated Federal Officer, opened meeting.
Roll Call	Rosalind Matherne, Acting Joint Committee Analyst, conducted roll call. TAP member attendees: Melanie Almeida, Michelle Brookens, Tony Earwood, Mitch Gerstein, Steven Hall, Steven Skylar, and Jim Simpson IRS attendees: Melinda Purcell, Martina Coates-Nance, Mejbeen Balsara, and Tammie Eppard Public attendees: none
National Office Update	Saul Hernandez, Acting TAP Director, shared that the Local Taxpayer Advocate (LTA) List, including an International LTA point of contact, which is the Puerto Rico LTA, is ready for sharing with the members through their respective TAP analyst. Saul noted that in the listing, the highlighted fields indicate Acting LTAs and shared the Austin, Texas address field was highlighted due to recent office move. As LTA staffing updates occur, a new list will be distributed.
TAP Update	Fred N. Smith, Jr., Acting TAP Manager, shared updates regarding the Tuesday August 12th and Tuesday August 19th Joint Commitee Planning meeting (virtual). Meeting is open to the chairs and vice chairs. Encouraging the chairs to reach out to their members to solicit ideas and concerns they may have about the program. Also to share out regarding items they'd like to see change for 2026. The National Taxpayer Advocate (NTA), Erin Collins, confirmed she will be in attendance on August 12th during the opening session.

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Approve June 26, 2025, Meeting Minutes Joint Committee Meeting Minutes DRA	Michelle Brookens, TAP 2025 National Chair, asked for comments. No comments. Asked for motion to accept minutes as they stand. Tony Earwood made a motion and seconded by Jim Simpson. No objections. Passed.
TAP Chair Report	Michelle Brookens, TAP 2025 National Chair, asked members to ensure they've reviewed NTA's Objectives Report for fiscal year 2026. The report has nine objectives, which she touched on briefly: 1) Improve automation and metrics to enhance the taxpayer experience; 2) To expand the IRS online account functionality; 3) Reduce the average time to resolve identify theft victim assistance cases from nearly two years to four months; 4) strengthen IRS oversight of unethical tax return preparers; 5) Expedite resolution of centralized authorization file number suspensions to protect tax professionals and taxpayers; 6) Complete processing of all employee retention credit claims and ensure rights are protected; 7) Improve responses to Freedom of Information Request Act requests; 8) Strengthen appeals, independence and operational efficiency; and 9) Improve the IRS's criminal voluntary disclosure practices. And, there are two specific research objectives: 1) Explore ways the IRS can use modern technology to improve taxpayer service in the 2024 filing season. Customer Service Representatives (CSR) answered 32.1% of the calls they received and only 24.4% of the calls received after the filing season through September. Additionally, the wait time to get a CSR to answer more than tripled, increasing from 3.4 minutes to 12.6 minutes. The research will identify opportunities for improvement in the telephone processes, as well as explore uses for automation technology; 2) To improve these metrics, the second research objective is to study the impact of the IRS's Research Applied Analytics and Statistics outreach to increase earned income tax credit participation by eligible taxpayers without children. Thanked Saul for the LTA List and Roz for all she does to help keep the member organized, sharing of the pre-reads and coordinating all communications between the committees. Thanked the chairs for reminding their committees members to keep up the good work with updating their activities in TAP Space. Acknowledged Rob for diligently working providing some summary Activity Reports. Acknowledged the staffing transitions have been challenging but is confident they will not deter the work of the TAP.

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	Added that accurate representation of volunteer time is crucial to providing value to the TAP as seen through the eyes of the administration. Calls on all chairs is to lead by example. Be mindful to post your activity in a timely manner and to reach out to any members who you feel may need assistance in quantifying their time spent working on the issues, whether through committee meetings, outreach, email pre-reads or other communications. Cautioned them to refrain from micromanaging their committees and keep in mind that all come from different backgrounds and goal is to help everyone get caught up on their activity reporting. Posting the time is far more productive than pointing out they are lacking activity hours. We do not have a large block of time that we would have had for a face-to-face meeting, we are planning for an all TAP virtual meeting where more time will be available. Stay tuned for more information about this and find ways to spread the message of TAP through outreach. Shared appreciation for all that members do and the work of the analysts and support staff.
TAP Vice Chair Report	Mitch Gerstein, TAP 2025 National Vice Chair, acknowledge Fred, Acting TAP Manager, for his support. Outreach meeting update. We now have a new individual outreach plan template designed to guide and support our advocacy efforts. Resource to help structure the individual outreach activities and encourage engagement more broadly beyond work already happening in our committees. Members should be spending between 200 and 300 hours per year whether that's TAP dancing at community events, volunteering at Volunteer Income Tax Assistance (VITA) or Low Income Tax Clinics (LITC) sites. Posting on social media or simply spreading the word about TAP's mission to improve the IRS as part of that initiative. Encouraged contact with the LTAs and Stakeholder Partnerships Education & Communication (SPEC) partners. Continue to direct people to the improve irs.org site and continue to highlight TAP through use of the member's business cards. Add the new digital version of the TAP Speak Up brochure for download. Shared link previously with members. Highlighted the TAS Roadmap brochure, which is a useful visual illustration of the complexity of our federal tax system. This helps members understand where TAP fits into the larger picture. Printed versions can be ordered online, too.

	The NTA Objectives Report is now posted to our TAP home page under news and events. Encouraged members to use the subscribe feature on the site to stay up to date with the latest TAP news, events and other opportunities. Special thanks to Kyle Kipple for seeking additional TAP members to help create and share content to increase our visibility. TAP social medial presence is entirely driven by the members and we've not seen our full potential in the space. With greater engagement and collaboration, we can change that and we're already making progress. Fred added that the outreach plan was also shared with each TAP analyst with direction to share with their respective committees.
Public Comments	Michelle Brookens, TAP 2025 National Chair. No members of the public.
Project Committee Review/Activities	**Committee Chairs**
Notices and Correspondence	Steven Sklar, TAPstevesklar@gmail.com. Nothing to submit this month to the JC. There are two recommendations he hopes to get out of the committee by August. Shared there's some frustration when dealing with the IRS regarding the revamping of the notices. Specifically, the committee would like to coordinate with the IRS to help them during the review process. Fred shared that, today, he sent several recommendations for Systemic Advocacy (SA) review.
Special Projects	Steven Hall, TAPNYStevenHall@gmail.com Shared that the committee has encountered issues of meeting coordination due to prior exiting TAP staff member. Issue is now resolved. Did not meet quorum so no new issues to share, today. Shared updates on referral 68581, expand VITA and LITC programs for international taxpayers. The referral was rejected by IRS and the committee is in process of rebuttal. Asking how embassies could be a site for international taxpayers for tax issues. Committee sharing a full listing of 27 different federal departments that work within the US embassies, which provides services for all types of issues.

	Another issue relates to IRS customer service inefficiencies. Finalizing the referral that'll have several suggestions. One of the referrals recommends the IRS improve their YouTube channel. Referral 66912, there were some minor word adjustments and the TAP analyst is continuing to research into any kind of references of the electric tax administration.
Tax Forms and Publications TFP TCC TAC Referral #77867_Taxpayer unc	Jason Crispin, jdcafsp@gmail.com Brings to the committee referral 77867, which is a joint project between tax forms and publications, taxpayer Assistance Centers, and Taxpayer Communications. Referral involves Form 8821, Tax Authorization, and the related instructions. A total of 15 recommendations in the referral. Key recommendations are: Adding a QR code to the form; put a clear warning on the form that the form remains in effect until it's revoked. Recommend a three-year twilight of the authorization be automatic. Some pushback from SA and the Attorney Advisor Group (AAG) because some complex tax issues may last beyond the three-year period. The goal of the recommendation is to avoid back-actors or inadvertent disclosure of taxpayer information. Also recommending there be an online revocation option through taxpayer's account. Final recommendation is asking IRS to send out an annual reminder the 8821 is still in effect. Goal is to enhance communication transparency. Michelle acknowledged the excellent job of all three committees then asked for motion to elevate referral to IRS. Tony Earwood made a motion and seconded by Jason Crispin. No opposed. Passed.
Taxpayer Assistance Center Improvements	Jim Simpson tapazjimsimpson@gmail.com Acknowledged collaboration on 8821. Shared that project 66143 came back from IRS as non-adopt. Committee reviewing for next action. Committee has a referral regarding the IRS transcripts, which is with SA and AAG for review. Shared they've been doing a VITA product review.
Taxpayer Communications	Melanie Almeida, TAPIdahoMAlmeida@gmail.com Nothing new for this meeting but anticipates there might be one or two referrals for next month's meeting and one for the September meeting. Working primarily on communication strategies between the IRS and taxpayers through individual

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	online accounts and worked a few items involving the chatbot. One issue that will be referred next month involves the Form 1095A, which is a report of eligibility for health insurance or enrollment in the health exchange. There's not an easy access to the information by the taxpayer in their online account or a way to share with their preparer.
Toll Free Phone Lines Committee Issue 78148 Chatbot and Live Chat Technol Issue #78239 Improving IRS Comm	Anthony Earwood, **taptexasanthonyearwood@gmail.com** Appreciates the members and Roz for support. Back in March, began putting a lot of data together regarding the electronic products and services. Referral 78148, the chatbot and live chat technology. Committee had a subject matter expert (SME) share information with the committee and there are eight recommendations. Michelle asked for motion to accept as written. Steven Sklar motioned and seconded by Tony Earwood. No opposed. Passed. Referral 78239, involves modernization and reduce dependency on phone support. Michelle asked for motion to accept as written. Melanie Almeida motioned and seconded by Steven Sklar. No opposed. Passed.
Action Items	Rosalind Matherne, Acting Joint Committee Analyst. Meeting minutes for June 26th were approved and posted on improveirs.org site. Issues being elevated to IRS are: Issue 77867, Taxpayers Understanding of Form 8821 Tax Information Authorization; Issue 78148, Chatbot and live chat; and Issue 78239 Improving IRS Communications. Asked members to decline the prior Teams meeting invite series because a new series being issued.
Roundtable	Michelle Brookens, 2025 National Chair. Opened for discussion. Melanie, asked if possible to rename TAP. Shared that in Idaho, the State set up a new site named, taxpayer access point (TAP), which takes the user to the Idaho Tax Commission. Fred agreed of need to explore renaming. Saul shared that he'd elevate issue to Chief Counsel for guidance. Melanie asked about a face-to-face training. Michelle shared there are plans to have some training for members, which could be mentor training. Asked for attendees to go back to their committees to ask for training topics.

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	Tony asked about the TAP poster displayed behind Roz, which is available to members upon request.
Closing	John Lipold, Designated Federal Officer, closed meeting.

Pre-Reads:

- June 26, 2025, Joint Committee Meeting Minutes
- TFP, TCC & TAC Issue 77867 Taxpayer Understanding Form 8821
- TFPL Issue 78148 Chatbot and Live Chat Technology
- TFPL Issue 78239 Improving IRS Improving IRS Communication: Understanding the Taxpayer and Tax Professional Experience

Next Joint Committee Meeting will be August 28, 2025, at 2:00 pm ET