

**Taxpayer Communications Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Thursday, July 10, 2025**

Designated Federal Officer (DFO)

- John A. Lipold Supervisory Management and Program Analyst

Attendance

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

- **Staff**

- | | |
|---------------------------|---------------------|
| • Jose Cintron | TAP Program Analyst |
| • Saul Hernandez | TAP Director |
| • Robert Rosalia | TAP Program Analyst |
| • Fred N. Smith Jr. | TAP Manager |
| • Ann Tabat | TAP Program Analyst |
| • Kudiratu Usman-Olugunna | TAP program Analyst |

IRS Staff

- Mejbeen Balsara Taxpayer Services Program Analyst

Public

- Vicki Urbanik-Randall (TAP) Alternate- Indiana

Welcome/Opening Meeting

Lipold opened the meeting and greeting everyone on the call.

Roll Call

Quorum was met.

National Office Report/ DFO Report

Saul Hernandez welcomed everyone to the call. The Speak Up Brochure will be published soon. The June Objectives Report has been completed and

hardcopies will be available. Smith advised that the Joint Committee training will be in August and members should advise their Chairs and Vice Chairs will attend, please let them know any topics they want discussed.

Chair Report

Almeida welcomed everyone and thanked everyone for all the work done outside of these meetings. Hwang reminded everyone to log your hours.

Approval of Meeting Minutes

June 12, 2025, minutes were reviewed for accuracy or grammatical errors.

Seidman motioned; Hwang seconded

Action: Minutes accepted as presented.

Public Comments

Ms. Urbanik- Randall said it's a pleasure to be sitting in on the committee and was thankful for the access.

Committee Updates

Response received

Project 72106- Asynchronous communication: Evaluating a centralized communication experience

Almeida indicated that this issue is being considered for a rebuttal and a Subject Matter Expert (SME) has been requested. We are looking for more information to determine why all suggestions were denied.

Issue 72107 (*Taxpayer-requested data: Why they need it and how we can help them achieve their goals*). We are looking for more information from IRS concerning the reasons for the denial of the recommendations

Issue 77909 (*Taxpayer understanding of Form 8821 Tax Information Authorization*) The committee voted to combine this with the referral from Tax Forms and Pubs concerning this issue (77867)

Subcommittee 1 Updates

Tasha Preisner reported:

- Issue 77882 (*Communicating with the IRS: Taxpayer and Tax Professional Perspective*)

This was going to be combined with an issue from Tax Forms and Pubs. However, they decided to forward with their issue alone. We need to decide what we want to do with this issue. This issue will be closed and associated with the issue from Forms and Pubs.

- Issue 77695 (*Keep taxpayers informed*)

We are looking to add more self-service and automation for taxpayers by attaching an “Upload Document” tool to online account and add meaningful status updates. The committee is awaiting additional information from the SME to make a determination.

- Issue 65342 (*IRS have a DLN number*). Awaiting more information from the SME.
- Issue 68815 (*Is there a way to digitally make multiple years of tax returns*) Committee voted to close this issue.
- Issue 70987 Streamlining the Tax Preparation Process. Hwang recommended the issue be kept and offered to write up the recommendations. This will be kept and worked in Sub Committee 2.
- Issue 72107 (*Taxpayer-requested data: Why they need it and how we can help them achieve their goals*). Reviewing IRS Response. Recommending a rebuttal of the IRS determination. This will be discussed with an SME.

Subcommittee 2 Updates

Jose Cintron reported:

- Issue 67401 (*Resubmit a direct deposit refund*)

Will keep for additional research.

Issue 69847 (*Copy of IA letter and terms*) Will keep for additional research.

- Issue 71020 (*When paying taxes online*) Will keep for additional research
- Issue 71114 (*Option to print online Form 14039*) To be closed

Outreach Committee Report

Hwang reported on the remaining Tax Forums. He posted the dates on the chat. Individual outreach plans will be sent to individual TAP members. Asking for volunteers for October and November Newsletters. Almeida will do October; Hwang will take November. Hwang also asked for volunteers to help write posts for the TAP Facebook page. Preisner will to October.

Screening Team Report

Halleman reported 32 Issues were reviewed, 26 were closed, 4 placed in Parking Lot and 2 transferred. The report was accepted.

Action Items

Cintron will complete the following actions:

- June 12, 2025, minutes to be sent for posting

- Project 72106 accepted for rebuttal; SME requested.
- Project 72107 accepted for rebuttal; SME requested.
- Project 77695 issue being worked; SME requested
- Project 77909 elevated to JC subject to consolidation possibility.
- Screening and Parking lot report accepted.

Roundtable

Almeida reminded the members that when sending e mails to make sure the TAP e-mail box is copied so that activities are properly tracked

Closing

Lipold closed the meeting at 2:54 PM Eastern time.

**Next Meeting: Thursday, August 14, 2025
2:00PM ET, 1:00PM CT, 12:00PM MT, 11:00AM PT**