

**Taxpayer Communications Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Thursday, June 12, 2025**

Designated Federal Officer (DFO)

- Fred N Smith Jr. TAP Special Analyst

Attendance

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

Staff

- Kevin Brown TAP Administrative Assistant
- Jose Cintron TAP Program Analyst
- Rosalind Matherne TAP Program Analyst
- Robert Rosalia TAP Program Analyst
- Kudiratu Usman-Olugunna TAP program Analyst

IRS Staff

- Mejbreen Balsara Taxpayer Services Program Analyst

Public

- Vicki Urbanik-Randall (TAP) Alternate- Indiana

Welcome/Opening Meeting

Smith opened the meeting and greeting everyone on the call.

Roll Call

Quorum was met.

National Office Report/ DFO Report

Smith welcomed everyone to the call introduced Saul as the Acting Director. Hernandez introduced himself and is looking forward to a good meeting.

Hernandez also reminded the committee that an updated list of Local Taxpayer Advocates (LTAs) will be shared as soon as we receive it.

Chair Report

Hwang 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

May 8, 2025, minutes were reviewed for accuracy or grammatical errors. Brookens motioned; Halleman 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

Hwang indicated that this issue is being considered for a rebuttal and a Subject Matter Expert (SME) has been requested. Wiseman and Brookens pointed out that with many of the recommendations on the "project list" they really are adopted. Hwang indicated the review will still take place.

Subcommittee 1 Updates

Tasha Preisner reported:

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

This issue is being worked in conjunction with the Toll-Free Phone Lines committee. An SME has been requested and research continues with this issue.

Preisner discussed some of the thoughts or ideas to be discussed during the upcoming research and meeting with the SME for this issue.

- 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. An ambitious recommendation would be to try to bridge the

internal databases to the online account to have access via online instead of needing to make a phone call for this information. This is to allow self-service to lessen the impact of people having to call in by phone and the phone systems being jammed up. An SME has been requested.

Subcommittee 2 Updates

Walter Webster reported:

Issue 77909- Taxpayer understanding of Form 8821 Tax Information Authorization

Webster indicated the project appears to have been completed and inquired about the next steps. Jose Cintron and Robert Rosalia indicated that management is deciding whether this will be consolidated with the Taxpayer Assistance Center Improvements committee and the Tax Forms & Publications committee or remain a standalone project. Webster motioned; Hwang seconded.

Action: Project approved to the JC pending possible consolidation.

Outreach Committee Report

Hwang thanked Wiseman for this month's newsletter article and noted that Brookens will write the one for July. Halleman indicated there was discussion with Alan Seidman for either the October or November slot. Hwang will take the remaining month. Hwang encouraged everyone to reach out to their community for meaningful issues; like and share Facebook page; use LinkedIn for outreach; and to log all of your TAP related hours on www.tapspace.org.

Screening Team Report

Halleman reported 105 issues screened: 21 Parking Lot; three transferred to other committees; and 81 closed. The Parking Lot was worked and of the 20 issues, seven were assigned and 13 were closed. Four went to Subcommittee 1 and three went to Subcommittee 2. Brookens motioned; Halleman seconded

Action: Screening and Parking Lot reports unanimously accepted as updated.

Action Items

Cintron will complete the following actions:

- May 8, 2025, minutes to be sent for posting
- Project 72106 accepted for rebuttal; SME requested.
- Project 77882 to be worked in conjunction the Toll-Free Phone Lines committee; 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

Preisner going to the San Diego tax forum and requested outreach guidance for this event. Hwang may join her with this event. Wiseman asked for more information from Hernandez. Hernandez gave a detailed background of what he has done with the IRS, so the committee had more of an idea about his career. Hernandez gave a brief biography of his IRS service.

Closing

Hwang spoke of being excited to see issues being worked and thinks they are meaningful for the taxpayer. Smith thanked everyone for participating today and officially closed the meeting, at 3:45PM, EST.

**Next Meeting: Thursday, July 10, 2025
2:00PM ET, 1:00PM CT, 12:00PM MT, 11:00AM PT**