

**Taxpayer Communications Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Thursday, May 8, 2025**

Designated Federal Officer (DFO)

- Rosalind Matherne Acting, TAP West Chief

Attendance

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

Staff

- | | |
|----------------------|-------------------------------------|
| • Jose Cintron | TAP Program Analyst |
| • Conchata Holloway | TAP Program Analyst |
| • Annie Gold | TAP Administrative Assistant |
| • Kelvin Johnson | TAP Program Analyst |
| • Matthew O'Sullivan | TAP Program Analyst |
| • Fred Smith | TAP Program Analyst |
| • Lisa Hunter | TAS Legal Administrative Specialist |
| • John Manhire | TAS Legal Administrative Specialist |

IRS Staff

- Mejbeen Balsara Taxpayer Services Program Analyst

Public

- Vicki Urbanik-Randall (TAP) Alternate- Indiana

Welcome/Opening Meeting

Matherne opened the meeting and greeting everyone on the call.

Roll Call

Brown completed the roll call. Quorum was met.

Review Agenda

Matherne reviewed the agenda

National Office Report

Collins recognized Public Service Recognition week and thanked the members and the staff for their work. Collins is thankful that Treasury saw fit to keep TAP as an acknowledgment of its value. Collins reminded members to complete their activity reports.

DFO Report

Matherne reminded everyone the Outreach committee meeting will be on Thursday, May 15, 2025, at 1:00pm ET. The Joint Committee (JC) will meet on May 22, 2025, at 2:00pm ET, and Matherne encouraged other members to join.

Chair Report

Almeida gave thanks to the TAP staff and for Treasury for keeping TAP around. Almeida reiterated the purpose of the committee is to review areas of concern where taxpayers and tax professionals feel that communication is not affective between them and the IRS. Almeida thanked everyone for the participation in all of the committee actions.

Approval of Meeting Minutes

April 10, 2025, minutes were reviewed for accuracy or grammatical errors. Seidman motioned; Hwang seconded

Action: Minutes accepted as presented.

Public Comments

Alternate (Indiana) wanted to sit in on TAP meetings and is happy TAP is staying.

Committee Updates

Response received

Issue 72106- Asynchronous communication: Evaluating a centralized communication experience

This issue was not adopted so Almeida inquired about what the next steps are and what the typical response can be from the IRS. Cintron indicated responses could be adopted; non-adopted; partial adopt; under consideration; or resolved before to submission.

Hwang and Seidman think this can be rebutted. The committee inquired about what the next steps should be. The response will be sent to both subcommittees for further consideration.

Subcommittee 1 Updates

Tasha Preisner reported:

Issue 77910- Leveraging Social Media Data to Improve Taxpayer Service and Compliance

After discussing this issue, the timing is not good for such an issue. This issue will be placed into the Parking Lot. Seidman motioned; Almeida seconded.

Action: Issue placed in the Parking Lot

Subcommittee 2 Updates

Philip Hwang reported:

Issue 77909- Taxpayer understanding of Form 8821 Tax Information Authorization

Issue is still being researched; a report will come out soon.

Outreach Committee Report

Hwang indicated that outreach being completed because of the can-do attitude of the members of this committee. Hwang has setup office hours for employees to share experiences with the IRS for possible issue. Hwang encouraged everyone to reach out to your Local Taxpayer advocates (LTA) and your Stakeholder Partnerships, Education & Communication (SPEC) representative for outreach opportunities. Log your hours in your activity reports. Hwang is glad TAP is safe.

Screening Team Report

Halleman reported 23 issues were screened, with 17 closed; four put in the Parking Lot; and two were transferred to other committees.

Almeida tasked Subcommittee 1 to take on issue 77695.

Webster motioned; Hwang seconded

Action: Screening report unanimously accepted as amended.

Action Items

Cintron will complete the following actions:

- April minutes to be sent for posting.
- Response to Issue 72106 to be reviewed by both subcommittees for possible rebuttal.
- Issue 77910 moved to Parking Lot.
- Issue 77909 in progress should be ready by June.
- Issue 77695 assigned to Subcommittee 1.

- Screening Report accepted

Roundtable

Collins congratulated the committee for doing a good job in how they operate. Collins announced she will be retiring at the end of this month. It has been a great journey and Collins is happy for the opportunity to work with each and everyone. Collins indicated we may hear from her again. Holloway recalled starting with this committee when she first joined TAP. Holloway announced she would be retiring at the end of this month. Kelvin Johnson announced he would be retiring on May 30, 2025, also and thanked everyone for their service.

Preisner shared her success doing outreach via LinkedIn as it has been the most successful for her. Everyone congratulated all the staff who is retiring and wished the best for them.

Closing

Matherne officially closed the meeting, at 2:47PM, EST.

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