

**Joint Committee (JC)  
Taxpayer Advocacy Panel (TAP)  
Planning Session Day 2 Meeting Minutes  
August 25, 2021**

**Designated Federal Official (DFO)**

- Terrie English                      TAP Director

**Members Present**

- Laurie Brock                      Chair, Special Projects Committee
- Jim Buttonow                      Chair, Taxpayer Communications Committee
- Bradford Folta                      Chair, Notices and Correspondence Committee
- Martha Lewis                      Chair, Tax Forms and Publications Committee
- Eugene “Gene” Lillie              Chair, Taxpayer Assistant Centers Committee
- Robert “Bob” Moretti              National TAP Chair
- Lacy Rice                              Chair, Toll-Free Phone Lines Committee
- Christine “Chris” Scott              Chair, Internal Communications Committee
- Nina Tross                              National TAP Vice-Chair

**Visiting Members**

- Felecia Dixon                      Vice-Chair, Notices and Correspondence Committee
- Pamela Memmer                      Vice-Chair, Toll Free Phone Lines Committee
- Cynthia “CJ” Mills                      Member, Tax Forms and Publications Committee
- Charlie Simineo                      Vice-Chair, Taxpayer Assistant Centers Committee

**Staff**

- Sheila Andrews                      Deputy Executive Director, Communications, Stakeholder Liaison and Online Services (CSO)
- Kevin Brown                              Management Assistant
- Cedric Jeans                              TAP East Chief
- Susan Jimerson                              TAP West Chief
- Rosalind Matherne                      Program Analyst
- Matthew O’Sullivan                      Program Analyst
- Robert Rosalia                              Program Analyst
- Antoinette ‘Toni’ Ross                      Program Analyst
- Fred Smith                                  Program Analyst
- Kudiratu Usman-Olugunna              Program Analyst
- David Alito                                  Deputy Commissioner Wage and Investments (W&I)
- James Bellinger                              Program Analyst W&I
- Kenneth “Ken” Corbin                      Commissioner W&I
- John Hannas                                  Program Analyst W&I
- Cynthia “Cindy” Jones                      Supervisor W&I



## **Members of The Public**

None

## **Welcome**

English welcomed everyone and opened the call at 1:30pm ET. English thanked the committee for all of the suggestions that were given yesterday on how we can improve TAP.

## **Day 1 Recap**

Andrews spoke to the committee and was delighted to be at the meeting. The committee has done a great job this year and has some good referrals also. Andrews gave heartfelt thanks for all of the efforts the TAP this year. Taxpayer Advocate Services (TAS) has decided to allow employees to work from home for the rest of this year. The IRS will be hiring about 10,000 people to enact the Taxpayer First Act, now called the IRS First. The TAP has been very instrumental in providing feedback for this effort and Andrews thanked the TAP for being willing to share the grassroots perspective.

Moretti welcomed everyone to the call and complimented the committee on the meeting yesterday. Moretti spoke about putting some of the suggestions made yesterday before this TAP year ends by working with the staff.

## **Roll Call/Attendance**

Via Zoom and email by Brown.

## **Acknowledgment of Citizens**

N/A

## **Kenneth Corbin- Wage & Investment Commissioner & Taxpayer Experience Officer**

Corbin thanked the committee and the staff for having him back to speak with the TAP. Corbin gave an update on the Office of Taxpayer Experience since he last spoke with TAP in June of this year. Corbin started by wishing and hoping that everyone on the call along with their friends and family are healthy, safe, and secure during these troubled times.

The IRS has been instrumental in enacting a number of different legislations since March 2020, such as the Coronavirus Aid, Relief and Economic Security (CARES) Act, The American Rescue Plan Act (ARPA), other COVID-19 related laws and three rounds of stimulus payments to the American people. Together the IRS has issued more than eight billion dollars. The IRS has already started disbursing the Advance Child Tax Credit payments. There is also an effort to educate the taxpayer about this credit as well. There is a toolkit with information that the TAP can help spread via social media mediums to further get this information out to taxpayers who could benefit from this information.

The IRS started sending out economic payments using the data that we currently have, which was critical in accomplishing this goal. We expanded our data exchange to accomplish this by partnering

with the Social Security Administration and the Department of Veteran Affairs. Corbin asked the TAP to think of how the data exchange works at helping taxpayers with these experiences. Some communities prefer to work with other agencies or nonprofit organizations to better serves these communities.

Our office had to learn how to expand how we educated and reached out to taxpayers through either other languages or automated options for taxpayers who chose to conduct business that way.

Corbin reported that the IRS always has returns to process year-round. We are trying to get our levels back to pre-pandemic levels because we are getting more individual tax returns to process. In the Taxpayer Experience Office, we are looking at ways to improve our interaction with customers, a commitment to ensure equity and inclusion principles are reflected in our employees in our taxpayer experience programs, decisions, and interactions. Expanding our efforts to get more taxpayer information out in other languages is another goal. We are also skills training to all IRS employees through customer experience foundational skills development program to improve the taxpayer experience.

How can the TAP help us with this strategy?

1. Continue to engage with us about what you are hearing and seeing.
2. Provide insight on ways we can be innovative.
3. Helping us get the word out on ways to reach underserved groups.

Buttonow asked about how the IRS is prioritizing the acceleration of the online account issues.

Corbin responded that increasing expanded digital services is one of his priorities for taxpayers and tax professionals. In response to this priority, we have launched Tax Pro Account for professionals. This can help better serve our taxpayers and we continue to increase the functionality of this account for more access. The document upload tool is one of the features we added to accomplish this. This feature has been expanded to the Form 911 for the TAS. Corbin mentioned a new way to authenticate through a trusted partner from secure access. This allows for a broader opportunity for taxpayers to be able to pass authentication.

Corbin is advocating for us to introduce Secure Access Digital identity (SADI) to more of our programs. I am pushing for this in our Taxpayer Protection Program (TPP), a program where people are delayed from processing their return because it is suspected of identity theft. Increasing digital access is a priority of this office.

M. Lewis thanked Corbin for coming and answering our questions upfront in this meeting. Corbin indicated that multi-year funding can help with level of servicing. It takes 16 weeks after funding to hire and train new people to answer the phones.

Rice asked how are we serving communities (towns/counties/areas) who do not have very many tax professionals? And how is the IRS getting this information out to the public?

Corbin responded with increasing the number of partners we have in those areas. We are relooking at the Taxpayer Assistant Centers Committee (TAC) office imprints to see where we do not have support in those areas. We are looking at areas where we used to have offices to try and put coverage in these areas, such as pop-up services for these communities. Taxpayer experience days are planned for the future to those areas who don't have tax help. Our goals are:

- Identify new partners who need our help.
- Get them the training and tools.
- Pop-up in areas we cannot do this at.
- We are accepting ideas from the TAP.
- We are looking for employees in many TACs that we do not have coverage for. Go to [usajobs.gov](https://usajobs.gov) for the coverage.
- We work with Operation Hope, congressional offices, and local news media (we often ask for this to be put on Twitter or Facebook).

CJ Mills suggested that we empower employees to do their jobs by addressing the issue in an effort to think customer first. Corbin spoke of focusing on service for any IRS employee so they can focus on valuing the taxpayers. We should stop focusing on the length of the call for the assistors on the phones and focus more on serving the taxpayers.

Buttonow suggested sending an executive level of encouragement, a thank you, to those employees who are overwhelmed while helping the taxpayers.

Rice asked, are you considering hiring more personnel who have tax professional and customer service experience? Corbin responded, yes, they are looking for new employees with this level of experience. They are working with the Office of Personnel and Management (OPM) to make this change in our service.

Memmer presented the question; I, and other practitioners with whom I have discussed, have some concerns about how the online account access is structured in regard to practitioners. Corbin responded, yes, that has been raised by the practitioner community. We are looking for ways to improve this experience. Corbin would like to set up a separate meeting for this issue.

### **Annual Report Template**

Rosalia reviewed what to expect for the template and how it should be completed by each committee chair. Rosalia displayed the template form and discussed how it should be completed for the entire committee. Rosalia answered all questions that were brought up by the committee members.

### **Annual Report Template**

Rosalia showed the template and explained how the Chairs were supposed to complete it in great detail. Chairs are also encouraged to review the annual report from last year and make it flow. Chairs

should also seek assistance from committee members who wrote referrals and reference the newsletters as reference guides to complete this template.

Jeans suggested looking at this as telling a story to get the reader to understand how this will impact the public. In reference to those not adopted, you can refer to the IRS' position and speak more on the TAP's position about the referral. Andrews suggested speaking to the work that the TAP went through in putting these referrals together with the understanding that the Commissioner, National Taxpayer Advocate, and others will be reviewing this report.

### **Chair Election Planning**

Rosalia reviewed this process and encouraged members to work with their committees to get this process started. The following individuals volunteered to be the Election Official:

- Felecia Dixon
- CJ Mills
- Lacy Rice

Please send your vote for Election Official by tomorrow, August 26, 12:00pm ET, to Rosalia.

### **TAP Member Survey Results**

Jeans explained the purpose of the survey and asked the committee to encourage their members to take the survey so we can improve the TAP. Jeans reviewed the current survey and accepted feedback and suggestions from the committee to improve the TAP experience. Working virtually presented a huge challenge with regards to doing TAP business. This was a challenge in the training as well as members learning their job. There was also an improvement in members getting in touch with their Local Taxpayer Advocates (LTAs).

Suggestions were considered on how to continue to work the planning sessions within the virtual environment by English. Rice suggested a stipend during this process. Rice suggested extending the training time for these events from two to four hours. M. Lewis suggested considering a break in between the four-hour training sessions. M. Lewis suggested utilizing the committee meetings for continued training or using the mentor program to accomplish this.

Dixon also believes that four hours would be too much for members who have other commitments. Dixon highlighted the fact that the virtual environment reduces not only the training, but it also takes away from the overall hours that members are required to complete for the TAP commitments. Lillie suggested doing some procedural things outside of normal business hours in preparation for the TAP meetings.

Jeans noted that many of the responses received from the last survey are affected by the IRS responses to issues and recommendations that we have elevated to them. M. Lewis thanked the staff for all they have done during the virtual environment, which is hard to do. English let Lewis and the committee know the staff appreciates the committee recognizing their efforts.

Moretti thanked Usman-Olugunna for the hard work she does for the TAP.

### **Action Items**

- Send votes for election official to Rosalia.
- Encourage members to take the survey.
- The staff will put together an action plan for the suggestion raised during the meeting.

### **Public Input/Closing**

Moretti thanked everyone for attending, thanked Rosalia for organizing this meeting, and said he appreciates how better we are in this virtual environment.

English thanked everyone for their participation and Moretti for keeping us on schedule. English reminded the committee there will be something for the retiring members at the end of the TAP year. English closed the meeting at 3:26pm ET.

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