

**Taxpayer Communications Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Wednesday, July 13, 2022**

Designated Federal Officer

- Susan Jimerson TAP West Chief

Attendance

- | | | |
|------------------------|-----------------|------------|
| • Hercules Analitis | Chicago, IL | Member |
| • James “Jim” Buttonow | Summerfield, NC | Member |
| • Victoria Ramirez | Sacramento, CA | Vice Chair |
| • Candace Smith | Mustang, OK | Member |
| • Joanne Thurston | Marietta, GA | Member |
| • Leigh Ann Wood | Columbia, SC | Chair |

Members Absent

- | | | |
|-----------------------|--------------------|--------|
| • Richard Bell | Corpus Christi, TX | Member |
| • Denise Besson | Trufant, MI | Member |
| • Ruth Guyon | Bellevue, NE | Member |
| • Jared Lefevre | Billings, MT | Member |
| • Tracey Randall-York | Ontario, CA | Member |

Staff

- | | |
|----------------------|------------------------------|
| • Terrie English | TAP Director |
| • Conchata Holloway | TAP Program Analyst |
| • Matthew O’Sullivan | TAP Program Analyst |
| • Rosalind Matherne | TAP Program Analyst |
| • Annie Gold | TAP Administrative Assistant |
| • Michael Odom | W&I Program Analyst |

Quorum

A quorum was met.

Welcome and DFO Report

Susan Jimerson opened the meeting and welcomed everyone to the call. An overview of the agenda was provided and the following DFO Report:

- July 20, 2022, the Ad Hoc Committee for the TAP Chairs and ICC will meet at 2:30 PM, EDT

- July 21, 2022, beginning at 12:00 PM, EDT the Outreach Committee will have their meeting. Dr. Eugene Lillie heads this committee. The project committees' Vice Chairs will be in attendance
- July 27, 2022, beginning at 12:00 PM, EDT the Internal Communications Committee (ICC) will have their scheduled monthly meeting. The ICC works on external and internal communications. They also work on the Handbook
- July 28, 2022, the beginning at 1:30 PM, EDT Joint Committee will have their monthly meeting. TAP National Chair, Martha Lewis heads this committee. The Chairs attend this meeting

National Office

Terrie English welcomed members to the call and provided the following National Office updates:

- Thank you was expressed to members for their 100% participation in the Tax Forums. All the slots are filled
- Recruitment invites have been sent to members asking for their availability to assist with the interviewing of the 2023 applicants
- There will be a face-to-face meeting for the Joint Committee Planning Session this year. The committee Chairs have been invited to attend. The meeting dates are August 09, 2022, and August 10, 2022. There will be time allowed for callers to listen in. Members were encouraged to take advantage of the opportunity to hear what goes on. Members were encouraged to share any information with Leigh Ann Wood to present during the meeting. There will be a surprise visitor for members attending

Chair Report

Leigh Ann Wood provided the following Chair Report:

- Victoria Ramirez will lead the committee's meeting next month. Wood will be attending the Joint Committee Planning Session

Minutes Approval

TCC Minutes for June 08, 2022, were approved as submitted.
Wood motioned and Jim Buttonow seconded

Member of Public

N/A

Program Owner Report

Michael Odom shared the following updates:

- There are no open referrals, no reconsiderations, and no implementations checks
- There were two questions being tracked: One involves E-File rate, Online Accounts, Outreach messages, ID Me, Updates to Where's my Refund,

Forms 1045, 1040X, 1120, 1065, 94X and E-File of 1040X. They are working to get responses to the questions.

- The other question is due on August 01, 2022. It involves a percentage of papers for extensions and demographic breakdowns of 5.6 percent of paper Returns filed. They are working hard to get the information completed and sent to the committee.

Subcommittees Report

Subcommittee 1

Candace Smith provided the following update for Subcommittee 1:

- They had their meeting on last week but did not have enough attendance to have a full meeting
- **Issue 54248**, Maximizing Outreach for Benefits Subcommittee 1 is working on how to recommend IRS further Outreach to underserved populations improving their awareness of Tax information and benefits with special emphasis on low-income individuals, the elderly, and people with disabilities
- Members were encouraged to share any ideas for recommendations for their next meeting
- Subcommittee 1 members are waiting for the responses to the questions submitted to W&I
- **Issue 52167**, ID.ME involves Authentication concerns with www.IRS.gov The subcommittee is looking into obtaining more research on moving forward. More updates will be shared during next month's meeting

Subcommittee 2

Jim Buttonow shared the following updates for Subcommittee 2:

- Subcommittee 2 worked on two issues. Both issues still have outstanding questions. Victoria Ramirez assisted Buttonow in working on nine recommendations. The E-File issue was sent to members for comments
- **Issue 54250** Increase Electronic Filing of Forms>Returns has seven recommendations being worked. Subcommittee 2 will have the recommendation ready for the next full committee meeting. They were asked to do Outreach on this issue. Ramirez sent a message to members asking for suggestions.
- **Issue 43684** involves the status of amended returns awareness. They have two recommendations being worked for this issue. Members were asked to review form 15214 recommendation the subcommittee shared
- The subcommittee did not get to the new issue on Identity verification process. They will begin work on this issue during their next meeting

Screening Committee

Buttonow shared the following updates:

- The Screening Committee had their meeting on June 17, 2022.

- A total of 87 issues were reviewed, 62 issues closed, 0 new issues, 25 issues were placed into five buckets. Some have been assigned to subcommittees.
 - Subcommittee 1 has been assigned Issue 52167, ID.ME
 - Seven issues related to giving Taxpayers the ability and capability to email IRS with Q&A has been placed in the Parking Lot
 - Eleven issues were related to the ID verification
 - Two isolated issues: one was making recommendations to third parties was placed in the Parking Lot and the other one was related to technical areas of the Tax forms that was sent to Tax Forms and Publications Committee (TFP)
- Jim Buttonow motioned to accept the Screening Report and Ramirez seconded**
- Decision: Full Committee Consensus accept the Screening Report as submitted**
- Buttonow added the next Screening Committee meeting will be held on July 29, 2022. Members were encouraged to attend

Outreach

Victoria Ramirez shared the following updates:

- Outreach committee is working on social media updates. They are looking into creating new assets onto the website to make it more helpful
- There is an issue with having two pages. An Administrator will be reaching out to a prior TAP volunteer member who still has administrative rights. Updates will be shared on where they are with this later
- The Tax Forums booths will be starting next week. Volunteers are providing coverage in one-hour increments

Internal Communications Committee (ICC)

Ramirez shared the following updates for ICC:

- ICC members are working on the Newsletter template for all TAP committees to look more consistent
- They are looking at the TAP Handbook to revamp areas to make sure everything is current

Action Items

Holloway shared the following Action items:

- Forward TCC approved June 08, 2022, minutes to Kevin Brown for posting
- Post the Screening report by Friday July 11, 2022, and send a copy to each member
- Follow up with Odom and Gilbert Martinez on the responses to all questions. She will share with each member upon receipt

- Reminder to complete the Activity Reports on www.TAPSpace.org

Roundtable

Wood asked for any comments from members:

- Thank you to Buttonow for volunteering to do the article for the Newsletter for the month of July
- Holloway will send information to members and request a SME for the subcommittee to proceed on the new issue
- Smith asked if Buttonow would share information on ID.ME with the committee and he agreed to do so
- Hercules Analitis asked who was in charge for Issue 54248, Benefits and Barriers. Send information to Holloway and she will get it out to each member
- Ramirez asked for the date she will cover the full committee's next meeting while Wood attends the Joint Committee's Planning Session. It is the scheduled meeting on August 10, 2022
- Ramirez needed direction on where to forward the draft she prepared. Holloway encouraged members to review and provide feedback to be discussed during the next subcommittee's meeting
- Joanne Thurston expressed she was glad to be back
- Buttonow encouraged members to review his report and share any feedback. He also asked if all members are invited to the subcommittee meetings. Holloway added any member wanting to attend contact her and she will share the invite

Close

Jimerson thanked members and the meeting was officially closed.

**Next Meeting: Wednesday, August 10, 2022
12:00 PM EDT, 11:00 AM CDT, 10:00 AM MDT, 9:00 AM PDT**

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