

**Taxpayer Communications Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Wednesday, August 10, 2022**

**Designated Federal Officer**

- Susan Jimerson                      TAP West Chief

**Attendance**

- |                        |                    |            |
|------------------------|--------------------|------------|
| • Richard Bell         | Corpus Christi, TX | Member     |
| • Denise Besson        | Trufant, MI        | Member     |
| • James “Jim” Buttonow | Summerfield, NC    | Member     |
| • Victoria Ramirez     | Sacramento, CA     | Vice Chair |
| • Joanne Thurston      | Marietta, GA       | Member     |
| • Leigh Ann Wood       | Columbia, SC       | Chair      |

**Members Absent**

- |                       |              |        |
|-----------------------|--------------|--------|
| • Hercules Analitis   | Chicago, IL  | Member |
| • Ruth Guyon          | Bellevue, NE | Member |
| • Jared Lefevre       | Billings, MT | Member |
| • Tracey Randall-York | Ontario, CA  | Member |
| • Candace Smith       | Mustang, OK  | Member |

**Staff**

- |                      |  |
|----------------------|--|
| • Conchata Holloway  | TAP Program Analyst                          |
| • Matthew O’Sullivan | TAP Program Analyst                          |
| • Annie Gold         | TAP Administrative Assistant                 |
| • Michael Odom       | W&I Program Analyst                          |
| • Christopher Duling | NTA, Attorney Advisor                        |
| • Lesley Henley      | W&I Customer Ast-Relationship and Educ(CARE) |
| • Aphilla Hughes     | NTA, TAS Systemic Advocacy                   |
| • Doralisa Saldana   | NTA, TAS Systemic Advocacy                   |

**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:

- Today is the final day for the Joint Committee's Planning Session. There have been good discussions for the 2023 TAP year. Members were encouraged to join the call and listen in
- August 18, 23, and 31, 2022, the MSP Ad Hoc Committee calls are scheduled. Members were encouraged to join and listen in on the calls
- The Ad Hoc Committee meeting for the TAP Chairs and Internal Communications Committee (ICC) has been cancelled for this month
- August 18, 2022, beginning at 12:00 PM, EDT the Outreach Committee will have their meeting
- August 24, 2022, beginning at 12:00 PM, EDT the ICC will have their scheduled monthly meeting
- August 25, 2022, the beginning at 1:30 PM, EDT Joint Committee will have their monthly meeting. The meeting is scheduled for 1.5 hours

### **National Office**

Terrie English could not attend the call on today. She is attending the Joint Committee Planning Session.

### **Chair Report**

Victoria Ramirez provided coverage for today's meeting during Leigh Ann Wood's participation in the Joint Committee's planning session. Wood joined the meeting and shared the following:

- Subcommittee 2 is still writing their recommendation for the Free-File Issue
- Members were encouraged when doing analysis to include Free-File is one of the top ten serious problems
- More information will be coming from the Outreach committee on some things for the National Taxpayers Appreciation Day scheduled for January 14, 2023. The Internal Committee and the Outreach Committee will have more information later this month. Member were advised to be watching the information
- The National Taxpayer Advocate, Erin Collins shares yearly the ten most serious problems within IRS. The information usually comes out in January that says the focus for the year will be on the top ten most serious problems. Jimerson added the National Taxpayer Advocate shares her Annual Report to Congress
- Conchata Holloway was asked to share the Annual Report with the committee

### **Minutes Approval**

TCC Minutes for July 13, 2022, were approved as submitted.  
Jim Buttonow made the motion and Ramirez seconded

## Member of Public

N/A

## Program Owner Report

Michael Odom stated there were no open referrals, reconsiderations, or implementations checks and no SME questions. James Buttonow added Subcommittee 2 submitted questions to be forwarded to W&I. Holloway replied the questions were forwarded to Gilbert Martinez who is attending the Joint Committee's Planning Session. Holloway will follow up with Martinez.

## Subcommittees Report

### Subcommittee 1

Conchata Holloway provided the following update for Subcommittee 1:

- **Issue 54248**, Maximizing Outreach for Benefits has been forwarded to Legal for review and approval. Once it is received back, it will be forwarded to Quality Review and the Full Committee for their approval at the next meeting
- **Issue 52167**, ID.ME Subcommittee 1 members decided to create their own ID.ME to see what issues they would experience. They will begin to work on the referral based on real life experiences. Once feedback is received, the subcommittee will began work on the referral

### Subcommittee 2

Jim Buttonow shared the following updates:

- Subcommittee 2 came up with three recommendations for issue **43684**:  
The first one where is my amended return; their recommendation is for IRS to provide the timeframe to process  
The second one is general communication of the processing time  
The last one was on the lowest E-Filing rate; allow E-Filing of amended 94X Tax Returns  
**Buttonow motioned to approve all three recommendations. Ramirez seconded.**  
**Decision: Consensus Full Committee approve all three recommendations**
- **Issue 43684**, Improve Awareness of Amended Tax Returns  
Buttonow shared updates on E-File status. Holloway sent the flyer with information to Legal and after both subcommittees approval of the flyer it will be shared with Ramirez who will share with the Outreach Committee  
**Buttonow motioned to approve Subcommittee 2 report and Ramirez seconded**  
**Decision: Consensus Full Committee approve Subcommittee 2 report**
- Buttonow stated the ID Theft issue will be picked up next month

### Screening Committee

Buttonow shared the following updates:

- A total of 110 New issues were reviewed
  - Getting in contact with IRS and processing time are their biggest issues
  - There were issues on ID.ME and ID verification to validate returns
  - They continue to see Taxpayers digital communications requests
  - Subcommittee 1 and Subcommittee 2 are working Issue 52167, ID.ME
  - There were no new issues assigned to the subcommittees
  - Holloway added the Screening Report was posted on [www.TAPSpace.org](http://www.TAPSpace.org)
- Jim Buttonow motioned to accept the Screening Report and Denise Besson seconded**  
**Decision: Full Committee Consensus accept the Screening Report as submitted**

### Outreach

Victoria Ramirez shared the following updates:

- Members were encouraged to continue to do Outreach and submit the Activity Reports timely
- There is a list available for the LTAs for members who do not know their LTA
- Members looking for opportunities for Outreach were encouraged to reach out to the IRS Stakeholder Liaison
- Articles and/or events completed should be sent to Holloway to be included in the Newsletter
- Helpful information is on the Outreach Toolkit available on [www.TAPSpace.org](http://www.TAPSpace.org)
- Ramirez received the E-Filing message and will share it at their next meeting
- Jimerson encouraged members to reach out to Holloway if they were having problems contacting their LTA

### Internal Communications Committee (ICC)

Ramirez shared the following updates for ICC:

- ICC members are continuing work on the TAP website enhancements. Members were encouraged to review the web page on [www.ImproveIRS.org](http://www.ImproveIRS.org) and share any comments or suggestions
- They are continuing to work on updating the Handbook
- Thoughts and discussions are being considered for the National Taxpayer Appreciation Day

### Action Items

Holloway shared the following Action items:

- Thank you to Ramirez for a job well done and to Wood who joined the call.

- Forward TCC approved July 13, 2022, minutes to Kevin Brown for posting onto [www.ImproveIRS.org](http://www.ImproveIRS.org)
- Forward Issue 43684 to Gilbert Martinez to be added to the Joint Committee's Agenda
- Close Issues off the Screening send a copy to each member
- Transfer four to other committees
- Issue 54250, the Outreach flyer was approved, send to Ramirez to share with the Outreach committee for postings after their approval and post on social media
- Follow up with Odom and Gilbert Martinez on the responses to two questions from Subcommittee 2
- Ramirez will present the referral for Issue 43684 to the Joint Committee. Leigh Ann Wood will do the presenting in Ramirez's absence

### **Roundtable**

Wood asked for any comments from members:

- Buttonow will submit the article for the Newsletter for the month. He thanked Joanne Thurston for pointing out on the TAS website and informed the committee the National Office fax number has been corrected on the website

Jimerson thanked guests and members for attending the call and reminded members to report their time by using [www.TAPSpace.org](http://www.TAPSpace.org)

### **Close**

The meeting was officially closed at 12:48 PM, EDT.

**Next Meeting: Wednesday, September 14, 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.**