



**Taxpayer Communications Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Wednesday, November 9, 2022**

Designated Federal Officer

- Susan Jimerson TAP West Chief

Attendance

- Hercules Analitis Chicago, IL Member
- Denise Besson Trufant, MI Member
- James “Jim” Buttonow Summerfield, NC Member
- Tracey Randall-York Ontario, CA Member
- Joanne Thurston Marietta, GA Member
- Leigh Ann Wood Columbia, SC Chair

Members Absent

- Richard Bell Corpus Christi, TX Member
- Ruth Guyon Bellevue, NE Member
- Jared Lefevre Billings, MT Member
- Victoria Ramirez Sacramento, CA Vice Chair
- Candace Smith Mustang, OK Member

Visiting Member

- Martha Lewis TAP National Office Chair
- Eugene Lillie TAP National Office Vice Chair

Staff

- Terrie English TAP Director
- Conchata Holloway TAP Program Analyst
- Rosalind Matherne TAP Program Analyst
- Matthew O’Sullivan TAP Program Analyst
- Annie Gold TAP Administrative Assistant
- James Bellinger 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:

- Thank you to the Full Committee for having quorum all year



- Leigh Ann Wood, James Buttonow, and Hercules Analitis thank you for your service to the TAP
- Retiring members will have a graduation ceremony on November 18, 2022, beginning at 12:00 PM, EDT. Members were encouraged to attend in support of the members completing their 3-year term
- Returning members were encouraged to continue to do Outreach. Committee meetings will begin again in 2023. It is important to get the word out about TAP
- The email request for members to submit their committee preference is due by November 18, 2022. If there is no response, committee assignment will be where there is a program need
- Members were encouraged to consider being a mentor for the new members coming on board. Additional information will be shared on the mentoring program and training will be provided
- Thank you to all Veterans on the call. November 11, 2022, is Veterans Day
- November 15, 2022, ICC will have their final meeting for the year beginning at 12:00 PM, EDT
- November 16, 2022, Ad Hoc Chair meeting begins at 2:30 PM, EDT
- November 17, 2022, Outreach meeting begins at 12:00 PM, EDT
- November 17, 2022, The Joint Committee will have their final meeting for the year beginning at 1:30 PM, EDT
- November 18, 2022, TAP 2022 Member Graduation Ceremony begins at 12:00 PM, EDT

National Office

Terrie English thanked and welcomed everyone to the call. She provided the following National Office updates:

- The 2022 TAP year is coming to a close and appreciation was expressed to members for all of the hard work they have done
- IRS is hiring. A flyer was emailed to members to share with anyone they may know who may be interested in a full or part time position with IRS
- Members were encouraged to continue to do Outreach through December and into the new year. The Staff will be available to assist if needed. If members need to request mileage for travel, they were encouraged to get their request in to Jimerson
- Members were advised there will be a celebratory coffee party for having quorum all year

Chair Report

Leigh Ann Wood provided the following update:

- Members were thanked for their dedication and hard work
- Hercules and Jim were thanked for their 3 years of service to TAP



- Congratulations to the 2023 National TAP Chair and Vice Chair.

Minutes Approval

TCC Minutes for October 12, 2022, were approved as submitted. Jim Buttonow made the motion and Hercules Analitis seconded.

Member of Public

N/A

Program Owner Report

James Bellinger is filling in for Michael Odom. He shared the following:

- W&I is continuing to work through outstanding referrals
- Members are appreciated for all the work being done
- Jim Buttonow inquired on the response to the E-File balance due filers. Bellinger stated he will follow up with Michael Odom on the response for **Issue #54250**
- Conchata Holloway will send an email to Bellinger with the information

Subcommittees Report

Subcommittee 1

Jim Buttonow provided the following update for Subcommittee 1:

- Subcommittee 1 have a total of seven recommendations to approve on the ID.ME where they are trying to increase Taxpayers' access to the online ID.ME account:
 1. IRS should educate Taxpayers on security and privacy features
 2. IRS should add the login.gov authentication platform as a connected platform to gain access
 3. IRS should allow Taxpayers to sign up for an online account when filing their Tax Returns
 4. IRS should allow Certified Acceptance Agents to set up client's online accounts
 5. IRS should allow trusted provided to set up online accounts
 6. IRS should allow customer service representative to set up an online account
 7. IRS should fund ID.ME support to have additional representatives to reduce wait time

Wood motioned to approve and Buttonow seconded

Decision: Full Committee Consensus approve Subcommittee 1 recommendations

- **Issue #48868**, Updating Contact/Banking Information after Returns are filed. Subcommittee recommended this issue be closed

Jim motioned and Joanne Thurston seconded

Decision: Full Committee Consensus approve to close Issue #48868



Subcommittee 2

Buttonow shared the following update:

- Issue #54250, Increasing E-Filing Rate; Subcommittee 2 is waiting on responses to some follow up questions and recommended this Issue be pushed forward to be work next year.

Screening Committee

Buttonow shared the following updates:

- The Screening Committee met at the end of October and reviewed 150 New Issues:
 - 5 Issues were related ID.ME
 - 134 were complaints
 - 11 New Issues placed in the Parking Lot for next year
- A total of 139 Issues were closed and 11 placed in the Parking Lot

Thurston motioned and Buttonow seconded

Decision: Full Committee Consensus approve the Screening Committee's Report as submitted

Outreach

Buttonow shared the following updates:

- The Outreach Committee met on October 20, 2022
- Member were reminded to update their Activity Reports
- Appreciation expressed for the Online tool for submitting the Outreach Reports
- Discussions were held on using the Dooly application. There will be more information coming on this
- Discussions on using Social Media accounts. Outreach by E-Filing is good
- Members encouraged to do Outreach on IRS hiring

Internal Communications Committee (ICC)

Buttonow shared the following updates for ICC:

- Discussed the Social Media plan
- Members encouraged to attend the November 18, 2022, Graduation Ceremony
- Buttonow volunteered to submit the final Newsletter article month
- Encouragement to members to consider taking this on from the beginning to end

Action Items

Holloway expressed thank you to members for attending the meetings all year. Buttonow, Wood and Analitis congratulations on their graduation and shared the following Action items:

- Forward TCC approved October 12, 2022, minutes to Kevin Brown for posting onto www.ImproveIRS.org

- Encouraged members to submit their Activity Reports. Holloway is available for assistance when needed
- Forward Issue #52167 to Matthew O'Sullivan to be added to the Joint Committee's Agenda
- Close Issue #48868, update the Screening Report with the closed Issues, place the 11 Issues in the Parking Lot
- Follow up on Issue #54250 questions responses

Roundtable

Wood asked for any comments from members:

- TAP National Chair, Martha Lewis extended appreciation and thanked members for making quorum all year. Members were reminded to submit the Issue that will be going to the Joint Committee by Monday, which is the deadline. Tuesday will be too late. The Joint Committee will be having their last meeting for the year. Members were encouraged to join in on the Graduation Ceremony for the members retiring from TAP. Being the TAP Chair has been enjoyable and a great year!
- Eugene Lillie, TAP National Vice Chair stated he is looking forward to next year but encouraged members to close out 2022 with Outreach. There are a lot of things going on in November, December, and January. Members were encouraged to continue filling out the Activity reports. Departing members were encouraged to consider being ambassadors for TAP Mentors will be needed for the new members coming on board in 2023. Returning members were encouraged to consider becoming a mentor. He shared a reminder for members to respond to the Email requesting 2023 committee preferences. Lillie added it has been a pleasure working as the Vice Chair of Outreach all year. Appreciation and thank you expressed to the Staff and members for showing support all year
- Hercules Analitis expressed appreciation and thanked you to all. He will try and be an ambassador for TAP
- Buttonow shared his appreciation and thanked you to everyone. Working on this committee has been the voice of the Taxpayers. TAP is important and members were advised to translate that in their efforts to get the word out. Thank you expressed to Conchata Holloway for all of her support. Encouraged members to take on leadership roles
- Joanne Thurston added she has enjoy working on this committee and thanks to all
- Tracey Randall-York expressed thank you everyone for a great year
- Holloway expressed gratitude to all with a Happy Thanksgiving slide
- English expressed the committee has done a great job

Jimerson thanked members and her appreciation for the great job the entire team has done. Best wished to all the graduates. Reminder extended to all the Returning Members, the Staff is here and available to you.



Happy Thanksgiving and have a wonderful Holiday Season.

Jimerson thanked everyone for being on the call.

Close

The meeting was officially closed

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