



**Taxpayer Communications Committee  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Wednesday, October 12, 2022**

**Designated Federal Officer**

- Susan Jimerson                      TAP West Chief

**Attendance**

- James “Jim” Buttonow              Summerfield, NC                      Member
- Ruth Guyon                              Bellevue, NE                              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**

- Hercules Analitis                      Chicago, IL                              Member
- Richard Bell                              Corpus Christi, TX                      Member
- Denise Besson                            Trufant, MI                              Member
- Jared Lefevre                            Billings, MT                              Member
- Tracey Randall-York                    Ontario, CA                              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
- 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:

- Changes have been made with Staffing duties: Rosalind Matherne is the Analyst leading the Internal Communications Committee while Matthew O’Sullivan has been temporarily assigned to the Lead Analyst over the



- Joint Committee. The assignments will last until November 30, 2022, the end of the TAP year
- Information from the Activity Reports is used for the Annual Report. It is made available to the public. Members were encouraged to take time to do their reports and add all their information to receive credit for their hours. Susan Jimerson is the Lead for the Annual Report
  - October 13, 2022, is the deadline to volunteer to be a part of the Annual Report Team. Members in their first or second year are eligible to participate
  - October 19, 2022, the Annual Report Committee will have their first meeting. Their goal is to have the report completed the end of January 2023
  - October 19, 2022, the Ad Hoc Chair meeting will begin at 2:30 PM, EDT. The Chairs will discuss issues for the TAP
  - October 20, 2022, the Outreach Committee will have their scheduled meeting beginning at 12:00 PM, EDT. Eugene Lillie is the Lead
  - October 26, 2022, the ICC will have their meeting starting at 12:00 PM, EDT. Matherne is the analyst and Angela Madison is the Chair
  - October 27, 2022, the Joint Committee will have their scheduled meeting beginning at 1:30 PM, EDT

### **National Office**

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

- TAP year 2022 is wrapping up
- Members were encouraged to visit the website [www.ImproveIRS.org](http://www.ImproveIRS.org) for new postings related to TAP 20<sup>th</sup> year Anniversary
- The nominations for TAP Chair and Vice Chair have been made. There are some strong candidates with strong leadership skills. Members were encouraged to place their votes during the voting session
- The Ad Hoc Teams meetings have been very good. Information obtained from the meetings will be rolled in the Annual Report for Erin Collins, National Taxpayer Advocate

### **Chair Report**

Leigh Ann Wood provided the following update:

Members were encouraged to volunteer and assist with the completion of a section in the Annual Report

### **Minutes Approval**

TCC Minutes for September 14, 2022, were approved as submitted.

Jim Buttonow made the motion and Joanne Thurston seconded.



## Member of Public

N/A

## Program Owner Report

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

- He expressed their appreciation to members for all of the work being done. W&I is working through the committee's referrals.
- 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**

Candace Smith provided the following update for Subcommittee 1:

- Subcommittee 1 met on last week
- **Issue #52167**, ID.ME for Taxpayers to authenticate themselves for access to their online account. Subcommittee 1 identified seven recommendations completing the referral. Holloway has sent the referral to the Attorney Advisor for review. Subcommittee 1 anticipates having the referral ready for the full committee's review and approval by next month to move forward to the Joint Committee
- **Issue #48868**, Updating Contact/Banking Information after Returns are filed. Subcommittee is waiting for feedback from members to continue work on this issue

### **Subcommittee 2**

Jim Buttonow shared the following update:

- **Issue #52736**, Verifying Dependents' Social Security numbers is difficult. Subcommittee 2 recommended this issue be closed  
**Buttonow motioned and Victoria Ramirez seconded**  
**Decision: Full Committee Consensus Close Issue 52736**
- **Issue #51071** involves sending emails to IRS. Subcommittee 2 is placing this issue in the Parking Lot for next year
- Subcommittee 2 will continue to work with Subcommittee 1 on finishing up their work for the remainder of the year

## Screening Committee

Buttonow shared the following updates:

- The Screening Committee reviewed one hundred-fourteen new issues, three were placed in the Parking Lot, seven were on ID.Me, and there were one hundred-three other issues
- Some issues in the Parking Lot were closed; the TAC issue and four others



- Two issues were related to the phone lines for Subcommittee 2 to work next year
- Some involve elderly Tax preparations with ninety-five percent simply can not get a hold of IRS  
Buttonow motioned and Joanne Thurston seconded  
Decision: Full Committee Consensus accept the Screening Committee's Report

### **Outreach**

Victoria Ramirez shared the following updates:

- Members were encouraged to complete and submit their Activity Reports timely
- There are some members who have not completed their reports with information accounting for meetings they may have had
- Third year members were encouraged to enter all hours to be included in the award determination they will be receiving at the end of their term with TAP
- The Outreach committee will have their meeting on next week. Ramirez will share more information
- Overall input has been low for Outreach
- Buttonow added the audience has been ranging around five to six hundred per month
- Jimerson stressed reporting of hours on the Activity Reports are not just for the awards but it goes into the Annual Report
- Members were encouraged to reach out to their LTAs for possible Outreach events
- Eugene Lillie and the TAP Staff are available for assistance if needed

### **Internal Communications Committee (ICC)**

Ramirez shared the following updates for ICC:

- Social Media is an ongoing topic
- Approval is needed prior to postings
- Postings are allowed on the Facebook account and social media. Members were reminded the Staff will review prior to any postings
- Work on the TAP Handbook has been completed

### **Action Items**

Holloway shared the following Action items:

- Forward TCC approved September 14, 2022, minutes to Kevin Brown for posting onto [www.ImproveIRS.org](http://www.ImproveIRS.org) and on [www.TAPSpace.org](http://www.TAPSpace.org)
- Close Issue #52736 out in the system
- Update system with approved Screening Report and close one hundred-eleven issues
- Follow up on the Screening Committee meeting for November



- Reminder notification to members needing assistance getting in touch with their LTA to contact Holloway

### **Roundtable**

Wood asked for any comments from members:

- Buttonow requested:
  1. The Newsletter content be shared for the Annual Report assistance.
  2. Dates be shared for the last Full Committee is November 09, 2022, Subcommittee 1 is November 1, 2022, and Subcommittee 2 is November 2, 2022
  3. Outreach on E-Filing be completed
  4. Send more information to Taxpayers on balance due link to online payment method
- Thurston stated her LTA has been reassigned. Holloway will follow up and get back with Thurston
- Martha Lewis extended appreciation and thanked members for doing a great job and to continue the good work. TCC has one month remaining. Congratulations to TCC third year member
- Lillie shared he along with Anthony Jackson, Ken Corbin, Erin Collins the National Taxpayer Advocate and Brian Thomas will be attending an Outreach event in New Orleans. He will also be attending an Outreach in Las Vegas. David Newingham will also be in attendance
- Members were encouraged to continue to complete their Activity Reports and contact the Analysts for assistance if needed.
- Lillie shared a brief overview of the new [www.ImproveIRS.org](http://www.ImproveIRS.org) website. There is a lot of information about TAP added

Jimerson thanked everyone for being on the call.

### **Close**

The meeting was officially closed at 12:43 PM, EDT.

**Next Meeting: Wednesday, November 9, 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.**